Nov. 13th CORE Xchange Notes

Goals of the gathering were to cultivate relationships and facilitate reflection to continue to build the CORE network, while test-driving and getting feedback on some of the core questions we’re proposing to use in the pilot application and learning conversations.

Summary: This was a very lively meeting with lots of good feedback for our process. People found the process of having a deliberate learning conversation about a specific organizational capacity building need to be a good practice, and suggested it was worth doing in other contexts too, for the relationship building and reflection and learning it can bring, rather than just as a one-time exercise to help us craft the pilot. This is a way for people to experience the core practices and methods of CORE.

Agenda (as it actually played out, times are approximate):

10:00 Gather, sit

10:10 Becca’s limerick; AB introductions and quick overview:

* Pilot concept
* “Connector” concept
* “Test drive” plan for today – Handout with roles and questions (see attached)
* Q&A
* Ask for volunteers with a real issue they might want consulting about

10:30 Get into 4 groups of three, work through questions, stop and reflect every so often on how process is going, switch Connector A & B roles

11:15 Debrief – write 3 main points on post-its

11:20 Debrief with full group

* How was that for you?
* What worked well? What would you do differently?
* How could the guide be improved?

11:55-ish Go-round – name, organization, something you’re looking forward to later today

12:05 Thanks and next steps – looking for Founders, Connectors, feedback on draft application materials

Attendees:

Mary Stelletello, Mary Girard, Janis Senungetuk, Bert Stitt, Kent Yan, Marianne Morton, Anne Forbes, Laura V. Page, Robert Merrill, John Quinlan, Chris Petit, Becca Krantz, A.B. Orlik (Facilitator) Betsy Liotus (late)

AB’s Reflections:

Surprises:

DEPTH -- Both how participants dove into learning conversations and how thoughtfully they reflected on their experience. I noticed people commenting on the value of body language, listening more than talking, etc.

ENTHUSIASM -- Sometimes I worry that we're weird; that we've got this idea others won't appreciate. That worry was put to bed. We didn't need to "sell" the idea of these conversations at all; people just wanted to understand better how to balance their personal knowledge and skills with CORE's need for information. Delightful.

USEFULNESS to CORE -- From specific adjustments to certain questions to a broad wish for appreciative approaches before diving into "problems," the feedback we got was clear and valuable. I'm particularly interested in how best to work out the issues of confidentiality and recusing ourselves. We've collected ideas so far, but haven't taken a deep enough dive to answer the specific questions raised.

VALUE for PARTICIPANTS -- While we didn't ask for a show of hands, I did get the sense that the group appreciated being at the front edge, being asked to bring their full selves to a new process, being able to experiment and provide feedback, and being able to learn more about one another.

Input from evaluations:

**What parts of the event worked particularly well?**

Good flow for the discussions; exercises were well-designed and inspired our engagement.

Small group conversation

Small group work, post-it format

Well planned. Spacious.

**What suggestions do you have to make this kind of meeting more powerful in the future?**

Perhaps initial introductions or encouraging people to introduce themselves in preceding social time. Good-sized group for this; larger group may be more challenging.

Introduction at beginning of session, “check in”.

Introduction early on ☺.

Provide application form so we don’t spend time asking for info that we will have in hand when this goes live.

**What new ideas are you walking away with?**

Came in my consulting role: now may be looking for a consultant in my role as board president. Heightened awareness of good interview/listening skills.

Nice to see the progress being made!

Walking away feeling encouraged and affirmed, rather than with new ideas at this time.

Amazing to meet a room full of people (w/ a couple of exceptions) with related interests.

**What new actions, if any, are you committed to taking as a result of today’s meeting?**

Possible retention of a consultant. Desire to become re-engaged with CORE.

Staying engage with the process

Getting more involved; helping CORE succeed

I’m still excited about being a connector – need to understand time commitment

**What additional comments or suggestions do you have about the CORE Pilot Project?**

More focus group or role play situations such as this one; both to learn more for CORE; but also w/a networking component built in. Strategizing ways to engage a younger generation; possibly in context of fun, social settings initially.

It will be a challenge to have connections not start consulting. Perhaps tap into the coaching community to do the interviews. Int’l Coaching Federation has a chapter in Madison.

Off to a great start – impressed & excited about the leadership abilities of A.B. & Rebecca!

Go for it!

**Input from discussion:**

What underlying issues are there that would affect outcomes?

NVC folks could do interviews as listening practice

Elasticity in time is needed for learning conversation

Emphasize positive first/appreciative inquiry

Role of interviewee in organization will define what happens

Don’t seek solutions during conversation

“What is off the table” question could come sooner

Q 8 assumes Q7 answered “capacity building”

Q2 too easy (problem focus), need to start with Appreciative Inquiry, support reason for organization, passion

Culture/personality problem/elephant in room – what should connectors do about sensing that?

What if connectors have sense of what the “Real” problem is being different ? how to balance Connector’s opinions vs. what organization thinks.

Interview at least ED & board chair (separately or together depending on their relationship) – or whole executive committee if all-volunteer org

Listening skills are key – summarize, eye contact

Q4 – level of confidentiality needs to be established; cut question about personal impact; maybe ask instead “how does it affect day-to-day functioning of org?”

Do this again with application process done – not a fair test of the learning conversation

Wording not appropriate for all orgs – e.g. Faith-based, pastor instead of ED, elders instead of board.

Include way to assess values/principles – that would make a good match? E.g. if the organization advocates for X, is that okay with consultant?

Role of 2nd Connector is critical – write down occasional flash of insight that the interviewee has, give it to them

Keep roles “A” & “B” separate – primary and notetaker

Faith experience as deep well

Opportunity for reframing /assessing assets at outset

Kind of consultant question, wanted someone with affinity for our mission, experience in our type of organization (statewide vs. local); understanding our culture.

Consultant, view from several steps away, can remind people why they’re there

Q1 confusing – vision? Or measurement of impact?

Q5 is corollary to Q2 – redundant?

What’s needed now vs. a proposed/new initiative – wording and questions might be different, e.g. not what’s stuck, but what’s needed to move it forward, who’s got buy-in, etc.

Start with appreciation

Less structured

Nature/culture of Board –functioning – need more questions abou this

Who fills out application makes a difference

**Additional input from people’s /small groups’ notes**

Interviewer: personal contact, listen, summarize, natural feel

Prepare to name differences among staff/board if apparent

What is off the table –might want to ask either explicitly (written) or implicitly (cultural)

Board/Staff relationship, including founders

Confidentiality ? (Q4)

Reaction: “muzzled” by the structured questions

+!! Two people – notetaker e.g - wisdom – “can’t see yourself”

Stay longer w/spcific concern

Aware of questions – leading q “Have you thought of…”

Before questions explain organization, maybe mission?

Solution jumping – don’t’ become the consultant

Affirmations – register emplathy

POU of interviewee (availability) – exec. Com vs. board Prez/ED

Start with positive – wording – [human nature to go to prob]

Easier when interviewee is very verbal

#7 – Results

-- formulating a strategic question (antennae up)

? – “Do you know what kind of consultant you need” – reflect characteristics

-Record it

-Solutions -- no + and –

-Conversational – therefore tangents

**Input from individuals’ notes:**

Ask specifically about Founders of org?

Q1 – replace “out to cause” with “seeking.”

Betsy Liotus’ notes on test drive questions:

Q2 – rewording –“Are there ways in which your organization’s work is slowed own or stopped?”

Q5 – rewording – How do you see these challenges affecting the organization as a whole?

Q7 – challenges or issues

Q8 – define “succeeding?” – “moving forward”?

Add questions:

11. Fundraising / resource challenges? Real problem or symptom of other problems?

12. Does your board serve primarily in an advisory or governance role?