

Getting Started with SELF-ORGANIZING TOOLKIT

August 2018

Definition of SELF - ORGANIZATION

Self-organizing happens when any individual or group...

- **sees an opportunity** to make a change or try something out
- feels like they can **initiate action**
- finds **diverse others** from **a large network** to join with them or **collaborate**
- **experiments with small actions**
- accesses **the resources** they need to act
- spends a lot of time **paying attention** to what is happening, debriefing, learning from the experience, and **analyzing** what they did -- all to enable them to take a **better next step**
- **shares what is learned** with the larger network



Seeding Networks Through SELF-ORGANIZATION

The most important ingredient of a network is that it is self-organized. Through **self-organization**, people experiment in ways that help them better understand the system they are shifting.

This means that the primary purpose of network leadership is to **help many others initiate experiments and action**. This builds lots of new leadership as many different people start projects.

How Do You Start with Self-organized Projects?

Start with Clustering - helping people find others with similar interests and move to action

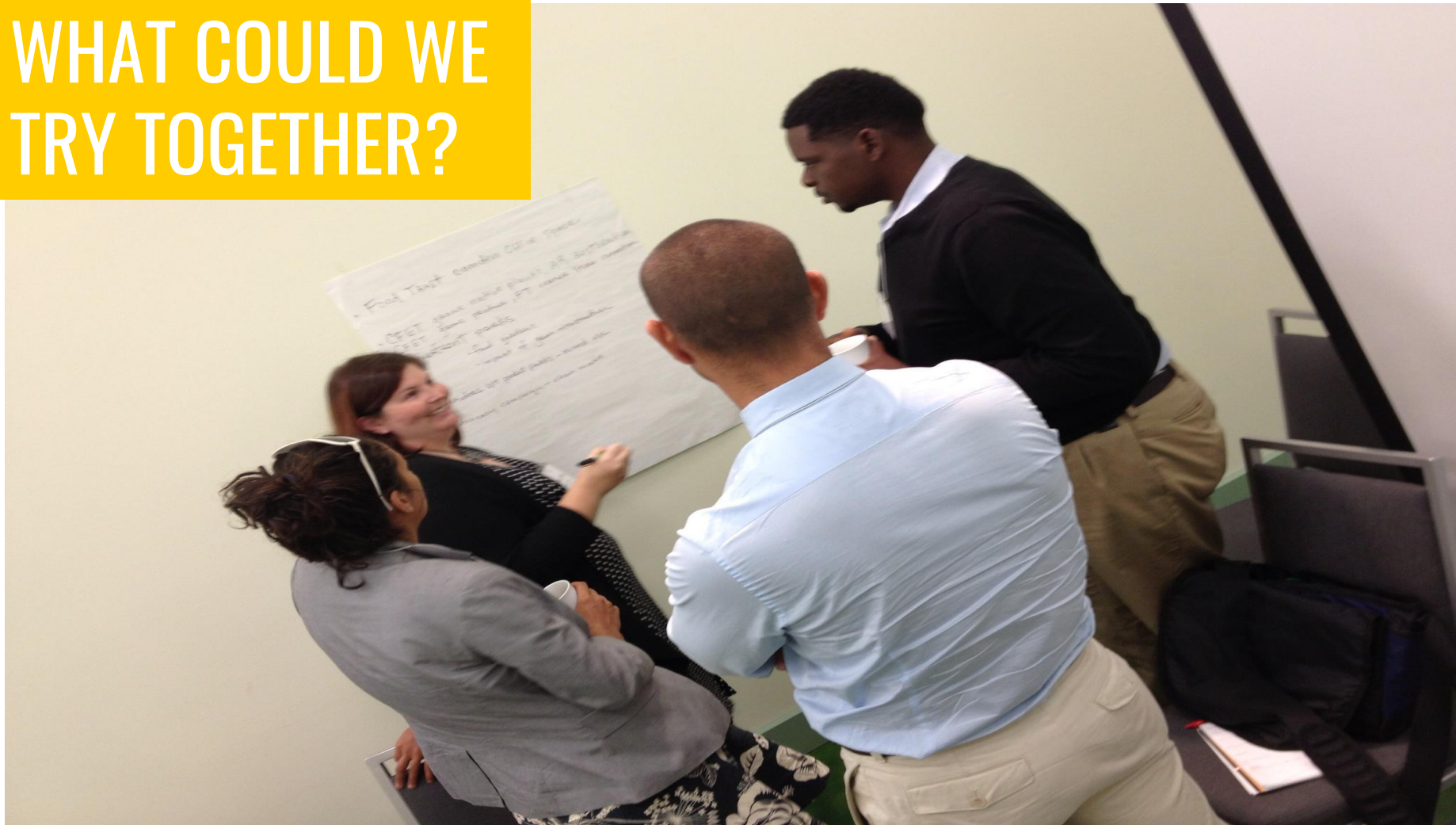


Post-It Note Clustering

1. Have people put their name on a PostIt
2. Add, in a few words answer: “What are you most interested in learning or doing with others in the coming months?”
3. Put a Star if you would be willing to convene group on this topic after our session.
4. Have people take a break & get volunteers to sort the PostIt notes into topic areas, see example.
5. After the break, have people form groups based on the clusters and discuss the topic they selected.

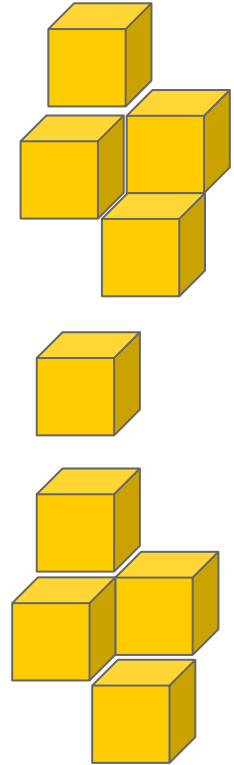


WHAT COULD WE TRY TOGETHER?



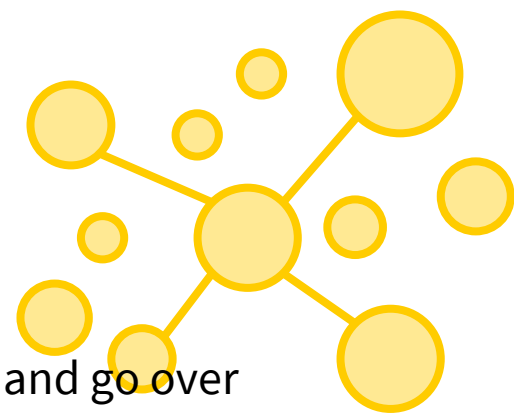
CLUSTERING AGENDA (30-60 minutes)

1. Have someone volunteer to be notetaker (preferably in a google doc), facilitator (make sure no one talks too much) and timekeeper
2. Have people fill out google spreadsheet or paper with name and email
3. Go round: Introductions and briefly why you picked this topic 5-10
4. What do you think could really make a difference around this topic? 15
5. Are some patterns emerging? A possible small action? What does it seem like might be a next step?
6. Do we want to get together to learn more? During gathering? After? Who else should we invite?
7. Will someone volunteer to set up a zoom call?



After a clustering session

1. Conference staff collect email sheets (if using paper)
2. If possible, contact coordinators during gathering (at lunch) and go over next steps such as
 - If they will meet virtually, do a quick introduction to using zoom.us
 - Show how to use doodle to determine a meeting date
 - Go over potential agenda for first session
 - Show [google doc templates](#) for taking notes, keeping track of participants, listing tasks and timeline

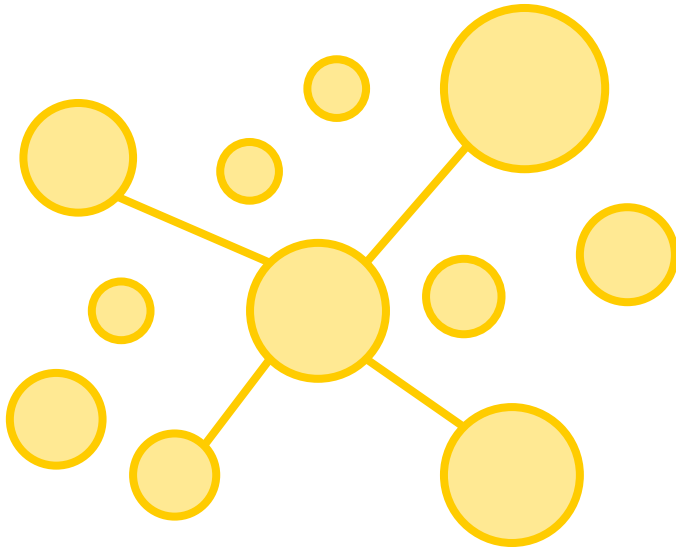


FOLLOW-UP

- Check in the following week to see if the cluster coordinators need help setting up call, etc
- Work with them on agenda
- Do another training on zoom if needed
- Have a zoom call with people from all the clusters to share what they are doing and do a peer assist (See following slide) for those with challenges

ANOTHER WAY TO CLUSTER

- **Survey using google forms:** help people find each other and move to action



Survey Using Google Forms or Polling

On which of the following are you most interested in working during the next 3 months?

- a. Option 1
- b. Option 2
- c. Option 3

How willing are you to organize that activity?

- a. Very willing
- b. Somewhat willing
- c. Not willing

What Projects Need to Know



Project Coordinators - Helping your Project be Effective

Notes

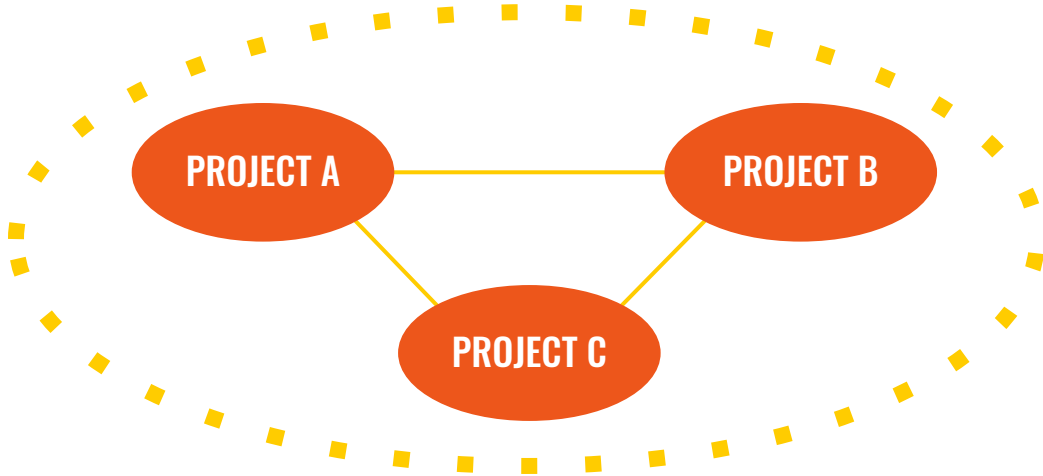
1. Have the project develop a set of Ground Rules (see: Activity 1).
2. Learn facilitation skills and effective meeting processes.
3. Develop agendas for meetings ahead of time, preferably in a Google Doc.
4. Make sure meetings engage everyone in the group (see: Activity 2).
5. Make sure you have a [system for tracking](#) meeting minutes, tasks, budget and participants contact information. Use this system to send reminders to people (see: Activity 5).
6. Make sure that part of each session includes deep reflection where you make sense of what is happening, capture insights, figure out what is working, stop what is not working (see: Activity 7).



Roles and Activities for Supporting Self-organized Projects

- Coach
- Set up a Community of Practice
- Create support system: communications, Innovation Fund, tracking and learning system

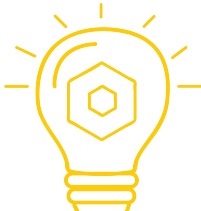
Coach: Coach each project



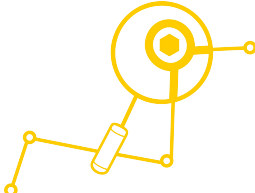
Community or Practice: Group to learn skills together, support each other and share what they learn



COMMUNICATION



RESOURCES



TRACKING

Support System Developers: Develop the Support System of communications, resources and tracking progress

How You Can Support a Self-organized Project: Coach

- Once people form projects, help coordinators of the projects learn skills and processes needed for effective collaboration.
- Coach project coordinators and help them deal with challenges. (see: [Activity 41](#)).



Setting Up a Support System Available to All Projects

Self-organized projects need support:

1. Set up communications systems for collaborative projects (see: Activity 6).
2. Set up a Communities of Practice (CoP) for people in self-organized projects. A CoP is a group that meets regularly to build skills, support each other and share what is happening in their projects. See SLIDE 22
3. Set up seed funds for self-organized projects (see: Activity 5).
4. Embed reflection practices in all aspects of the practice group (see: Activity 6).

Notes

How You Can Support a Self-organized Project: Set up a Community of Practice

- A Community of Practice usually meets once a month, often virtually using zoom (having cameras is a necessity), for 1 ½ hours
- Typical agenda is
 - a chat report out of activities during previous month
 - 1-2 short skill, concept building or peer assist sessions or 10-15 minutes
 - 1-2 breakout room sessions of 15-20 minutes each
 - Quick surveys (the results are often discussed in breakout rooms)
 - Reflection session and/or reflection survey

Notes

Setting Up a Communications System & Using Technology

- People in self-organized projects can save time and money using virtual technologies such as zoom and google docs. Spend time during convenings identifying local “tech stewards” who can help others and in sessions introduce the use of new technologies.
- Fill out the Communications Ecosystem chart outlining tools and platforms you will use: usually a group email, a Google Docs folder, and a videoconferencing platform (see: Activity 6).

Notes

Setting Up a Communications System & Using Technology - Cont'd

- Set up a Google Docs folder and include:
 - a spreadsheet which includes people's names, organizations, email addresses, and interests
 - a meeting agendas and notes document where people can make suggestions about items for each meeting agenda and can take notes during the meeting
 - A Task Chart
- Use zoom.us for videoconference meetings. Even if most of you meet face to face others can attend. Zoom.us can be downloaded to smart phones so anyone with a cell phone signal can attend.

SHARE AND SPREAD

Create a way to track and share what is happening

How will you capture stories and share them?

Who can take short videos using phones at your convenings and share?

Who will take notes and share?

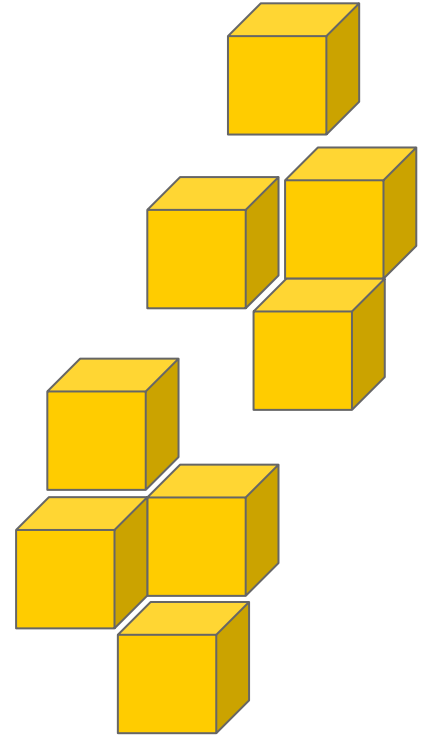
Notes



Setting up a Seed Fund

1. A seed fund can be small - perhaps only \$15,000 the first year - with grants from \$250 - \$2,000.
2. Find two to three people to make decisions who are trusted by all, know the network, and will not apply for funds.
3. Develop guidelines (projects need to involve more than one organization, you may want to emphasize youth involvement, etc.) and a short application, preferably less than one page.
4. Publicize the fund. Set a time when applications will be accepted. Most funds have a “first come, first served” policy.
5. If you have time, have the funding team ask questions and suggest ways to improve the proposal.
6. Try to tell the collaboratives quickly (within 1 month of application) if they have been approved.
7. Make sure all the approved projects agree to be part of a Community of Practice - monthly meetings, be they virtual or in-person, to help each other with challenges and share what they are learning.

ACTIVITY SHEETS



ACTIVITY 1: Setting up Ground Rules for a Project

Explain that ground rules are basic guidelines that all self-organized group participants need to agree to for the effective working of the group.

List some examples on a chart paper, such as:

- We are all responsible for the effectiveness and success of this working group.
- We will listen to each other with respect and an open mind.
- We take turns speaking and will not dominate the conversation.
- We need to ask questions to make sure we understand what others are saying.
- We will appreciate the work of others.
- If we have an issue or conflict, we will get help dealing with it.
 - Have the group break up into dyads or small groups.
 - Ask participants to modify any of these guidelines and then add additional ones.
 - Have the small groups report back on modifications or new guidelines.
 - Ask a small group to take all the suggestions, combine and edit them and bring them back to the next meeting.

ACTIVITY 2: Meeting Processes

There are several processes that are useful to engage participants in the project group:

Go round: Starting with one group member, go around the table in order, letting each person respond to a question or issue you have raised. Make sure that people understand they are to listen to all perspectives without responding. After the group has gone around once, ask people to summarize what they heard or suggest the sense of the group.

Dyads: When you sense that people need some time and space to get out their best thinking on a topic, have them pair up with another person. Remind the dyads that each person needs to get about half the time to speak. Remind people of the importance of listening carefully to what the other has to say and asking clarifying questions. After 5 minutes, ask for insights or new ideas that came up in the discussion.

Forming Small Groups: If a group remains as a whole group during the entire meeting, many introverts will not usually contribute and the meeting will tend to be dominated by more extroverted types. Having at least part of the meeting in small groups will provide an opportunity for many more people to verbalize their thinking. For example, if the group needs to come up with ideas for an event, break the group into smaller group of 3 to 5 people. Each group can do a quick summary of their best thinking and the group can synthesize these suggestions.

ACTIVITY 3: Task Worksheet for Projects

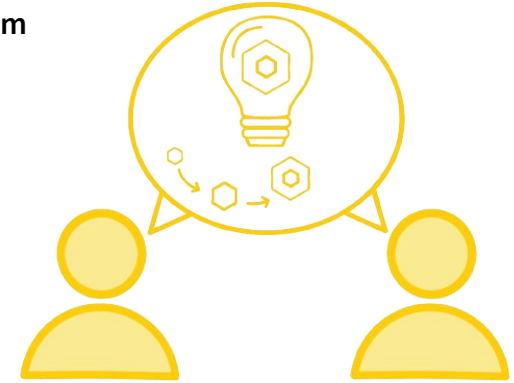
One of the most difficult aspects of practice groups is that there is no boss, so the group must find other ways to hold each other accountable. In addition, the practice group is only a small part of each member's work and so it is hard to remember what they said they would do. There are several things the group can do to remediate the situation. First, having an easy-to-find project management system that tracks all the tasks and who is responsible for what is essential. Google Sheets are perfect for this. Reminders that are automatically sent out before meetings (from an event set up in Google Calendar or Outlook) should include a link to the Google Sheet and encourage people to check what they were supposed to do. Here is a [set of templates](#) you can use for meeting notes, participants names, budgets, and tasks and timelines. Please make a copy and move to your google folders.

Task	Person Responsible	Others Involved	Date Due	Progress Notes

ACTIVITY 4: Coaching New Project Coordinators

A Network Weaver Coach is someone who checks in with new project coordinators to help them

- Notice what is going well (*this is most important!*)
- Make sense of what is happening
- Identify challenges and strategies for overcoming them
- Identify and solve problems that arise
- Articulate what they are learning
- Garner insights and reflections



Coaching Session

1. Start coaching sessions by asking the person what has been going well in his or her project coordination or network weaving.
2. Ask, “What do you want to work on today?” or “What are issues or concerns you would like to talk about today?”
3. People often just need someone to listen to them think through solutions or approaches. After they describe the issue, ask them what ideas they have about dealing with it.
4. If you have suggestions, go ahead and make them if you feel ideas are still needed. Suggest others they might talk to about this.
5. As you close the session have a discussion about what to focus on during the next time period. Record that somewhere so both of you can be reminded of it at the beginning of the next session.
6. After you have had several calls, ask the person being coached if he or she is feeling comfortable with the network weaving role or if another call or two would help.

ACTIVITY 5: Peer Assist Process

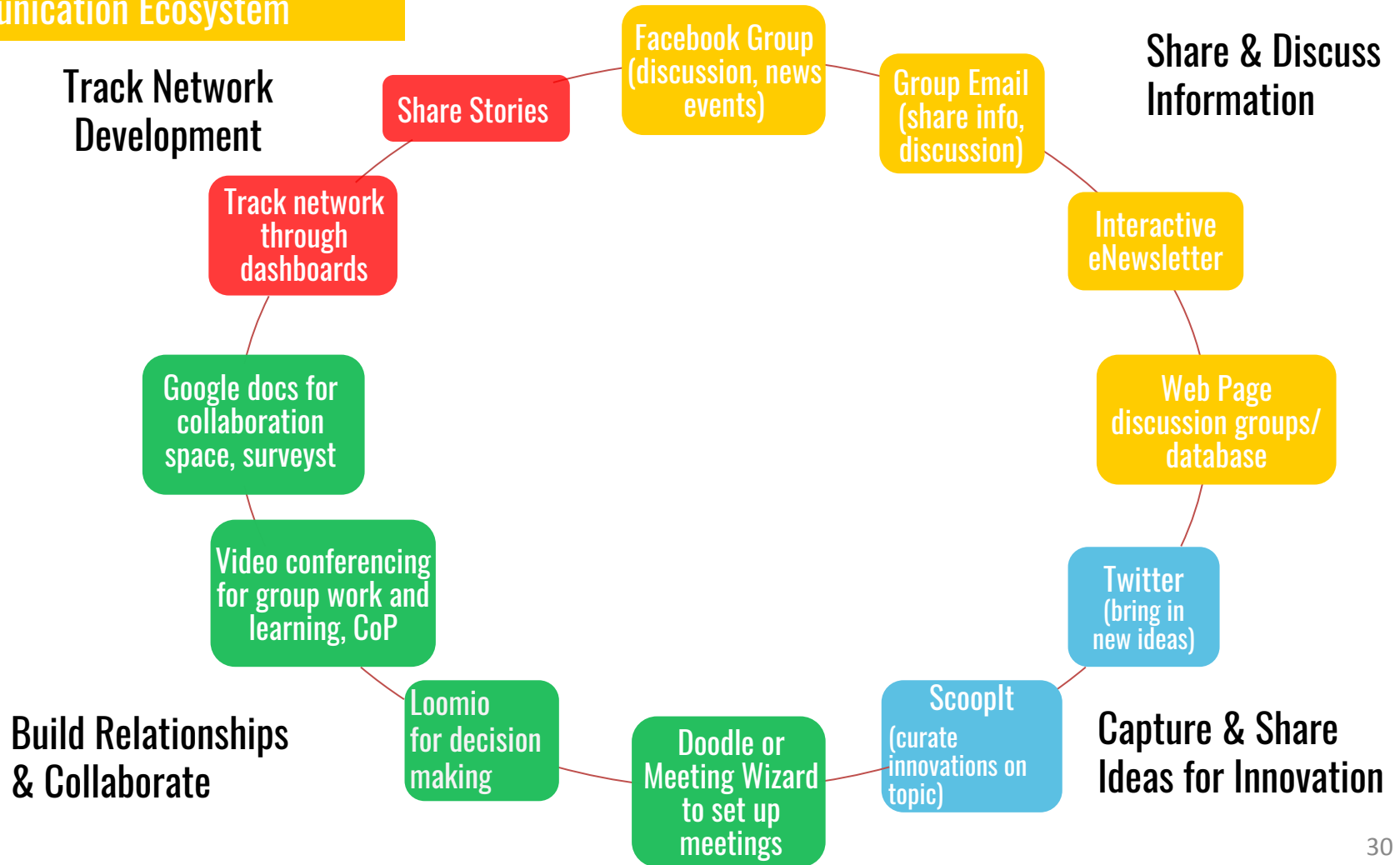
1. What is my challenge? 5
2. Clarifying questions?(Assisting group) What did you mean... Tell us more about... 5
3. Advice, resources, thoughts 10 (assisting group)
4. Person replies 5
5. Go-round: what did I learn from this discussion? (assisting group) 5

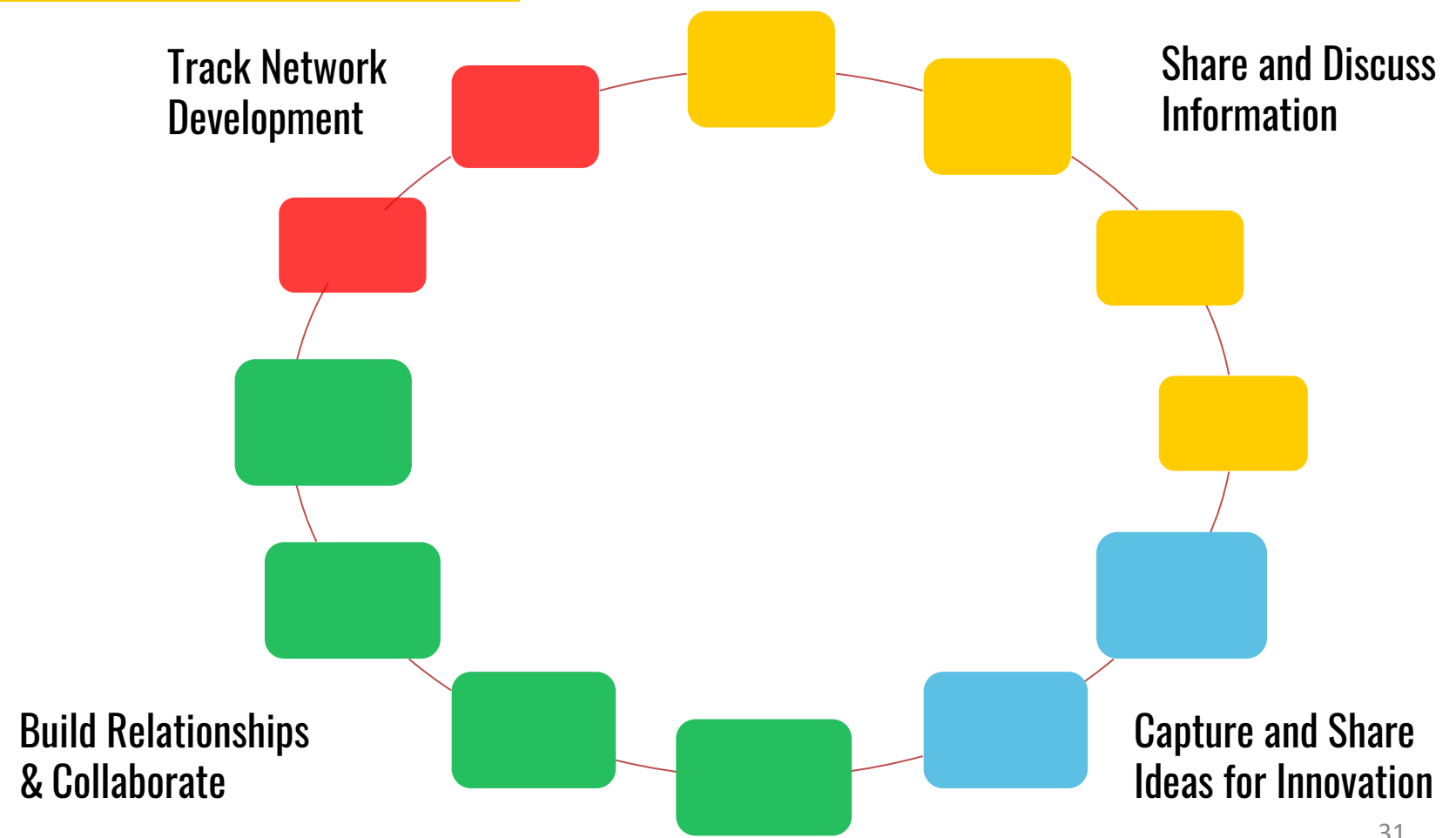
ACTIVITY 6: Setting up a Communication Ecosystem



1. Look at the chart on the following page to identify possible elements of your communication system.
2. Then fill in the Communications Ecosystem Worksheet with the platforms and tools you will use.
3. Identify who needs help with the tools you have selected.
4. Identify tech stewards willing to buddy up with people who need to learn and have them set up small group or one-on-one sessions with people.
5. Check in with people in the self-organized projects to see if the platforms/tools are working and which need to be changed or replaced.

Communication Ecosystem





ACTIVITY 7: Deep reflection

At the end of every meeting, phone call, or videoconference, the group should answer one to three of these questions to get people in the habit of reflecting on their work and discovering insights and new ideas about action.

1. What worked really well in this project?
2. Did it accomplish goals or outcomes? In what ways?
3. Did it fall short? Why?
4. What would you do differently?
5. What surprises came up during the project? What unexpected happened? What could you learn or capture from that?
6. What insights did you get during the project?
7. What processes did you use that worked well? Which didn't work so well? Why do you think that was?
8. How did people work together? Were there conflicts? How were they handled? Did people get any new insights or perspectives as a result?
9. Were there people or perspectives missing from this project that you would include next time?
10. What skills and processes did you help people learn as part of this project? What skills and processes would you spend time on if you did this over again?
11. What were the most innovative aspects of the project? How did they work?
12. What did you do in this project that you could transfer to other projects?
13. What is the most troubling aspect of the project? What might you do to deal with it differently?
14. What skills came in most handy during this project? What skills did this project make you realize you need to acquire?
15. What did you do in this project that wasn't really necessary? What turned out to be a waste of time? What activity contributed the least to the project success?



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