

**Guidebook**

# **Are we on the same page?** TOOLKIT

A tool that enables social innovators &  
their stakeholders reach common ground  
using fruitful friction.

Guidebook - Are we on the same page? Toolkit

This guidebook is part of the "Are we on the same page?" toolkit developed by Maria Belén Buckenmayer as part of her Strategic Product Design master thesis 'Fruitful friction as a strategy to scale social innovations' at the Delft University of Technology

This toolkit was designed for and with social innovators selected by the EU Designscapes program. (For more information visit: <https://designscapes.eu/>)

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For more details on the thesis & the toolkit visit: <https://reposit-ory.tudelft.nl/>

*"There's nothing physical or expensive or even slow in the process of paradigm change. In a single individual it can happen in a millisecond. All it takes is a click in the mind, a falling of scales from the eyes, a new way of seeing." – Donella Meadows*

**THIS TOOLKIT** for social innovators provides a process and set of components to develop an online workshop to reach common ground with stakeholders by using the concept of fruitful friction.

Inspired by the power of shifting mindset as a lever for system change by Donella Meadows combined with a scaling strategy that focuses on changing cultural routes like mindset, values and beliefs the workshop helps to become aware of peoples way of thinking, uncover similarities and differences which will enable the creation of a shared understanding. This foundation of productive collaborations aims to increase the impact of social innovations on a deeper level.

# Table of content

## The toolkit

- Overview 12
- Components 14

## Background

- Scaling social innovations 18
- Scaling deep 20
- Fruitful friction process 24

## Using the toolkit

- Introduction 28
- Prepare 30
- Plan 38
- Build 40
- Conduct 72

# How to read this guide?

This guidebook is one part of the 'Are we on the same page?' Toolkit. It should be used together with the preparation board (Miro) and the workshop template (Miro) which complete the toolkit.

Link to the Miro workshop template:  
[https://miro.com/app/board/o9J-INlpZo=/  
board/o9J-INlpZo=/  
board/](https://miro.com/app/board/o9J-INlpZo=/)

The first part of this guidebook gives an overview of the toolkit as a whole and outlines its' relevance, benefits, goal and application.

Link to the Miro preparation board:  
[https://miro.com/app/board/  
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board/](https://miro.com/app/board/o9J-IPQMMo8=/)

Next, a brief introduction about the concept of scaling social innovations, more specifically about scaling deep and fruitful friction as a catalyst of change will be given. The framework on which this toolkit is based will be presented which provides the overall process of fruitful friction to reach common ground.

To apply fruitful friction as a scaling strategy in a social innovation project, a co-creative alignment workshop format is created. This guidebook helps in planning, setting up and conducting this workshop to build common ground between stakeholders. It provides a step-by-step explanation prepare the workshop.

The toolkit is designed to build a co-creative (online) workshop with stakeholders and therefore a facilitator with some experience in facilitating (online) co-creative sessions is needed. However, in the last part of this guidebook tips for the facilitator can be found.

# **THE TOOLKIT**

Elements & purpose of the tool

# Toolkit context

## The goal of the toolkit

The goal of the tool is to co-create common ground between social innovators and their long-term collaboration partners to facilitate a deep mutual understanding as a basis for productive collaboration. The toolkit provides structure and guidance to use the concept of fruitful friction and enables innovators to create a customised alignment workshop to embark on a scaling deep towards the common ground journey.

## The goal of the workshop

The goal of the workshop is to make people aware of their own and others way of thinking to identify similarities and differences in perspectives and co-create a common understanding. It's a tool to connect and communicate with stakeholders on a deeper level that leads to meaningful relationship and impacts each individuals way of thinking.

## For whom is it?

The toolkit is developed for social innovators that need or want to engage new stakeholders in their project. It is designed for collaborations where alignment on a fundamental level is important.

## When will it be used?

This toolkit is designed for social innovations that move into a new context or transfer their idea to a new organisation. Primarily, the alignment should happen at the beginning of a new collaboration, hence this is when the toolkit is first used. Beyond that, there are other scenarios in this toolkit that can be used. For example, when there is a sense of conflict between the partners or throughout the process to reevaluate and reassure that people are still on the same page and that there is a shared understanding about important project topics.

## Why is it useful?

The process allows social innovators to understand their stakeholders' implicit perspectives (how people think, what they value and consider important) and creates a space for fruitful discussions of the different point of views. Similarities and differences of individuals perspectives are made explicit and the creation of a shared understanding (regarding the project goal and vision is created). This process builds trust and co-ownership between partners and prevents misunderstandings about basic concepts of the collaboration that otherwise, might emerge unnoticed in later stages of the project and cause troubles. Therefore, it builds the base for productive collaboration.

### Benefits

Using this toolkit and conducting an alignment workshop can help you to uncover if you and your stakeholder have the same **perspective** on the project if you have had similar **experiences**, if you use the same **language** and if you have the same **path** in mind to tackle the project objective (see Figure 1).



Figure 1: Possible benefits when doing the workshop.

# Toolkit overview

The toolkit consists of three parts: (1) guidebook, (2) preparation board (Miro), (3) Miro workshop template and is an addition to an initial training session where you learn and practice the application of the process. After the training, this toolkit can be used to recall information from the training and get support in building your workshop.

## 1. Guidebook

This guidebook is especially useful when using the toolkit for the first time as it gives a more detailed explanation about the background theory this toolkit is based on as well as information about the set-wise application of the toolkit.

## 2. Preparation board (Miro)

The preparation board is for you and your team to prepare and build the workshop. This document is not meant to be shared with the stakeholder. See Figure 2 to get an impression of the board.

The facilitator/ social innovator who takes the lead in the session can use the preparation board before every session to identify who should participate, what the focus of the workshop should be and prepare the different components of the workshop. In the preparation board, the different elements of the workshop will be explained in detail and ways to adjust and build them are given.

## 3. Workshop template (Miro)

The last part of the toolkit is a (Miro) template for an online workshop where you and your stakeholders can co-create a shared understanding. The template provides a basic structure and outline for the online workshop and can be used right away with little adjustments. See Figure 3 to get an impression of the board.



Figure 2: Image of the Miro preparation board for the alignment session.



Figure 3: Image of the Miro workshop template for the alignment session.

# **BACKGROUND**

Scaling Social Innovations Deep

# Scaling Social Innovations

This toolkit is designed for social innovations that are in the scaling phase of their project.

Social innovations bring value to people and society, to do so innovators need to scale their innovation. What makes social innovation particular in regards to other fields of innovation is that its' focus lies on impact. The social innovation process plays a critical role in the success of innovation and its ability to reach a large-scale impact.

## The social innovation process

Murray et al. (2010) introduce a six-stage social innovation process (see Figure 4) that starts with identifying the actual problem, developing and testing an idea that meets societal and individual needs, till its' implementation and scaling to achieve systemic change. The stages provide a framework and give orientation about the different aspects to consider when aiming for societal impact but do not necessarily follow a linear practice, hence, they can be iterative and dynamic. The stages, one to three are about (1) finding and framing the right problem, (2) generating ideas and (3) test these solutions in practice, using prototypes. The fourth stage is about securing viability, so, ensuring financial and resource sustainabil-

ity. In the fifth stage, the focus is on growing and spreading the innovation, to reach the final goal of systemic change, stage six (Ibid.). Systemic change is the transformation of the system, that involves laws and regulation, business models on a private and public sector level.

A lot of tools, methods and practical knowledge is available about the first four stages of the process. But little is known and available to facilitate social innovators in their scaling journey in a very practical and actionable way (Mulder & Kun, 2019). But only when social innovations master the scaling can they reach systemic change and have a lasting societal impact.

For this reason, this toolkit provides innovators with one way to scale their innovation and presents actionable steps innovators can take and apply in their work.

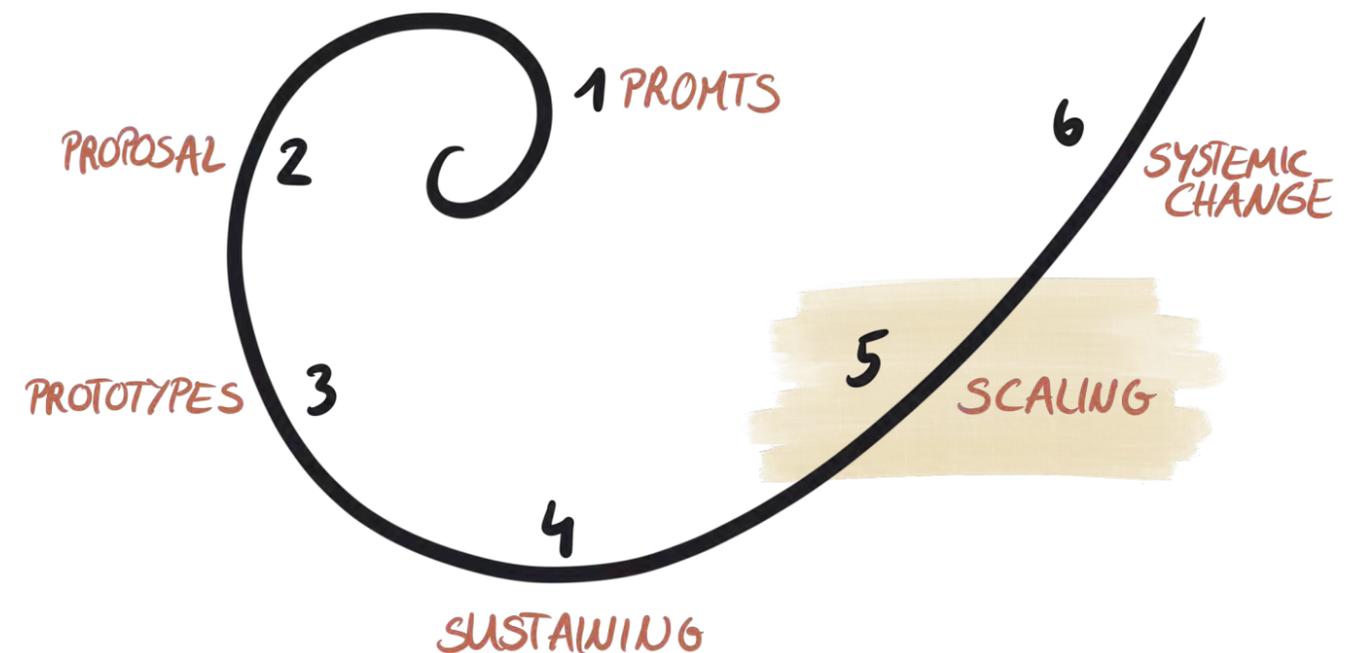


Figure 4: The process of social innovations after Murray et al. (2010). This toolkit focuses on facilitating social innovators in stage 5, scaling social innovations.

# Scaling deep as a lever of change

Scaling does not necessarily mean having a directly visible impact. Sometimes a deeper change can happen by addressing peoples way of thinking.

In this toolkit, the scaling is addressed on a deep mental level realising that transforming peoples way of thinking can be a great lever of change that is often neglected and is difficult to act upon (Meadows, 2015); Angheloiu, 2018, October 18).

This toolkit is based on the scaling deep strategy that is one of three main strategies to scale social innovations (Riddell & Moore, 2015).

**Three scaling strategies** (see Figure 5) Scaling out refers to scaling from one context to another and multiplying the idea in different contexts, like spreading seeds to grow a tree. Scaling up means

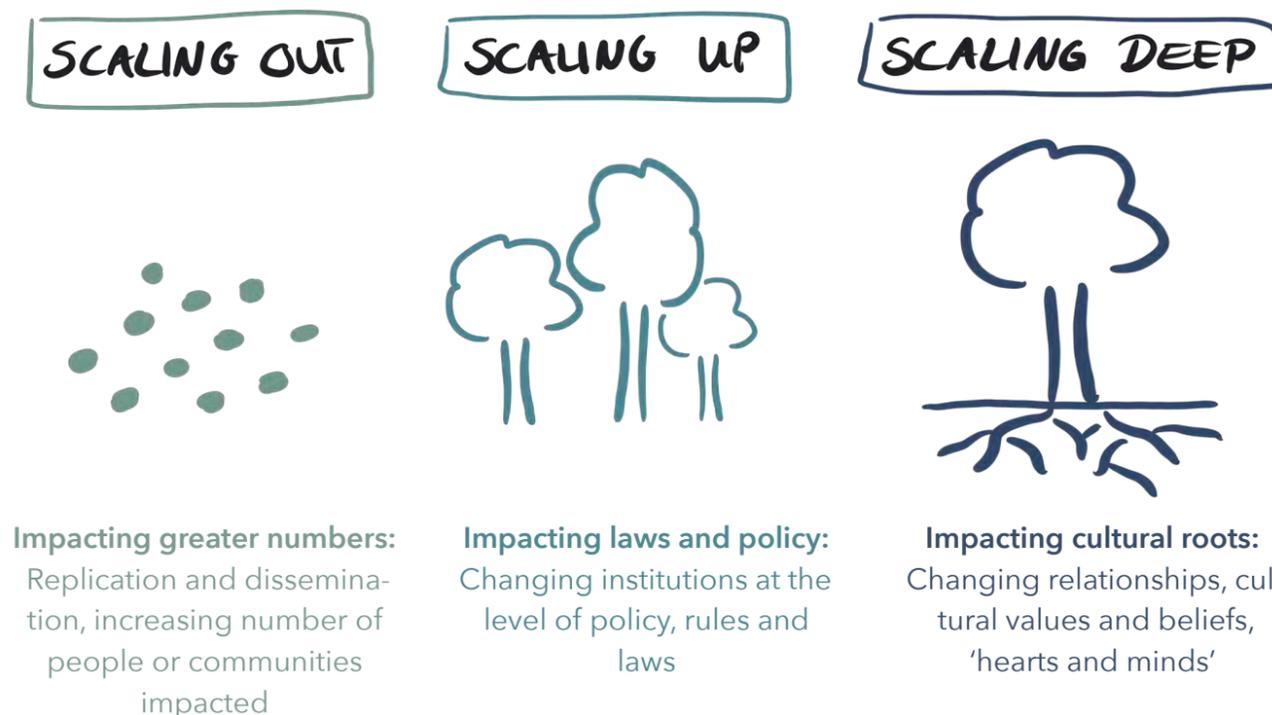


Figure 5: Three scaling strategies after Riddell & Moore (2015). This toolkit focuses on scaling deep.

impacting laws and regulations and can be seen as the grown trees that all grew after the same biological structure, referring to institutional laws and regulation that set the boundaries and provide the frame for a tree to grow. Scaling deep means changing cultural roots, values, mind and beliefs. This can be projected as the roots of a tree. The roots are what grounds the tree in the soil and create deep connections with other trees (Riddell & Moore, 2015). They are invisible from the surface but built the basic structure that let the tree grow, makes it strong and resilient. Scaling out and scaling up are more known and estab-

lished strategies, they happen at the surface, so are visible and tangible for the actors involved. Whereas, scaling deep is a process that is intangible and invisible and hard to grasp. The strategy of scaling deep targets the underlying structure within a person and of a system. Those deep leverage points can have a big transformative impact and enable innovation to reach systemic change (Meadows, 2015) (see Figure 6). This strategy is often not deliberately addressed by innovators. This toolkit facilitates social innovators to address this lever of change and scale their innovation deep.

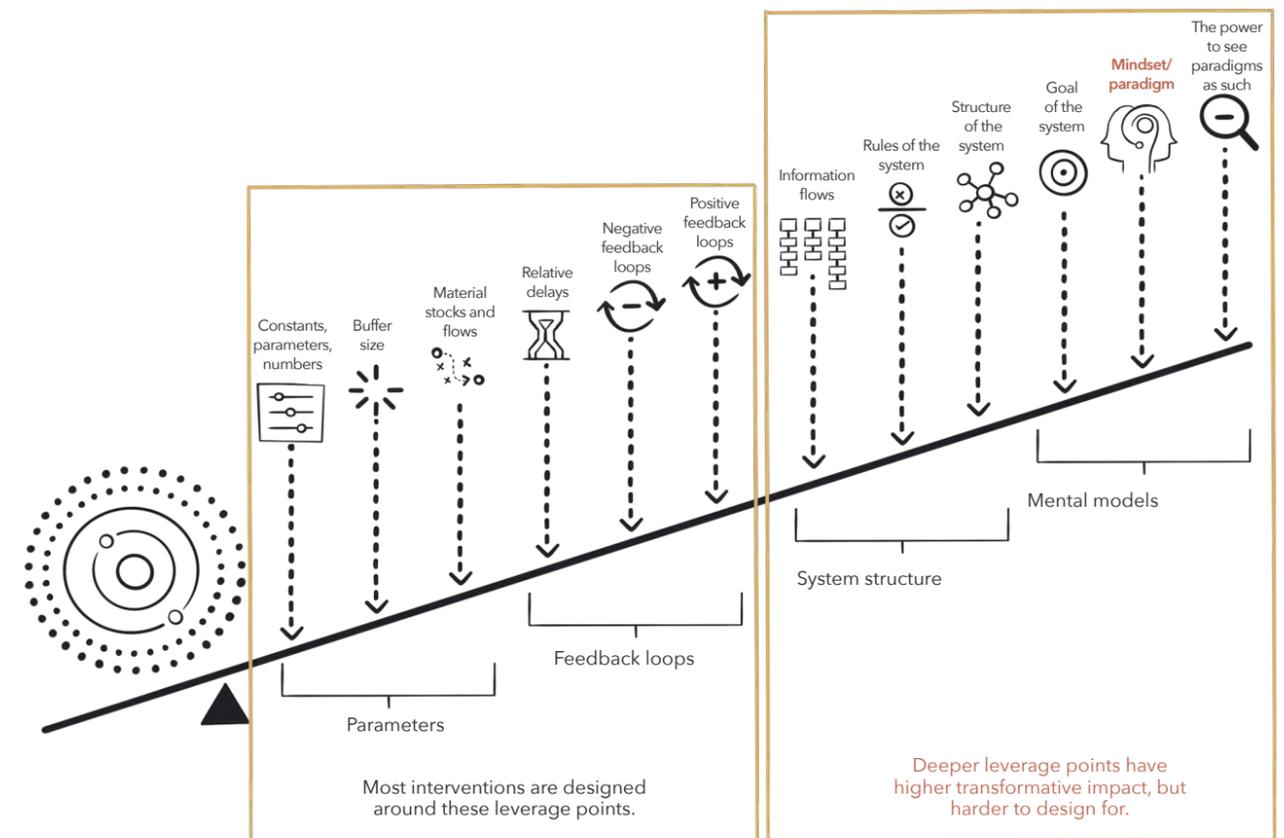


Figure 6: Level of system change after Donella Meadows (2015) & Angheloiu (2018, October 18). Deeper leverage points are harder to change but can have a higher transformative impact. This toolkit aims to tackle mindset.

# How does change happen?

Four basic steps are important for any transformation on a deep level (see Figure 7). Changing cultural beliefs, values, mindsets and beliefs are initiated by becoming aware of your way of thinking. Those implicit, tacit and intangible concepts need to be articulated and expressed so that others can understand your point of view and you can see theirs. The exchange of each others perspective is the basis for a possible transformation. Three aspects need to be considered in this transformation process, namely, that

it is an internal process but also a social one and that friction can be a catalyst for change.

## An internal process

Change needs to happen within you, nobody can force it onto you. There is no right way of thinking and no right perspective. This process is not about imposing one's mindset onto another person but it's about reflecting and becoming aware to be open for change.

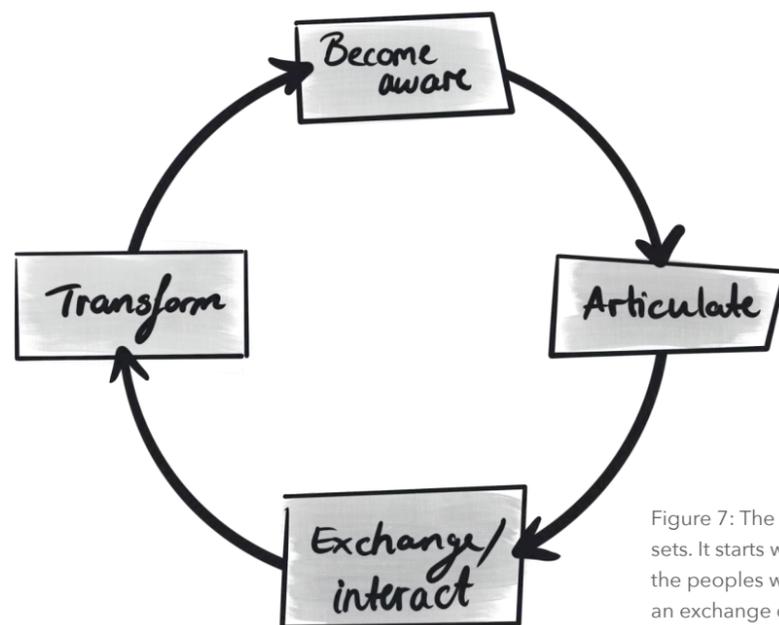


Figure 7: The process of changing mindsets. It starts with becoming aware. Once the peoples way of thinking is articulated an exchange can happen that can lead to a mindset transformation.

## A social process

Change does not happen isolated but it is a process that happens when you are confronted with new information and new experiences. It happens in interaction and communication with others. It's a social process of exchanging mutual perspectives (see Figure 8).

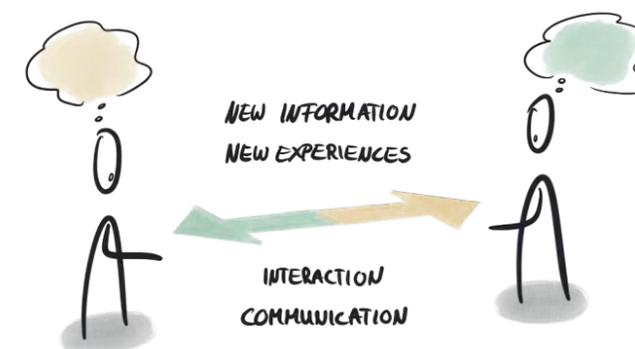


Figure 8: New experiences and information triggers people and change happens in interaction with others.

## Friction as a catalyst of change

Experiencing friction can be a facilitator for change. Friction here is defined as becoming aware of your way of thinking and realising differences in other people way of thinking. The exchange and realisation that there are multiple points of views create friction because it goes against what you believed to be true and know. This helps you to reflect, rethink and question your perspective and makes you more open for change (Fig. 9).

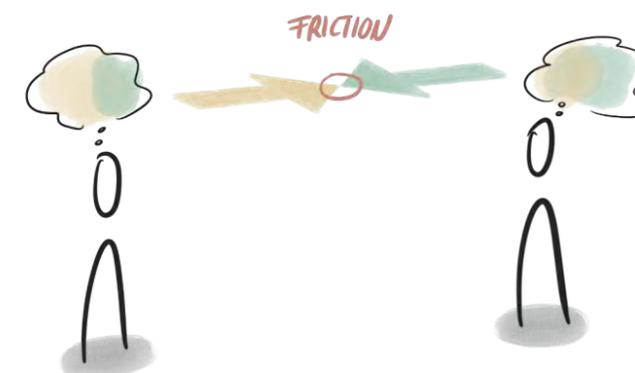


Figure 9: Friction can be a catalyst for change.

## Mutual understanding

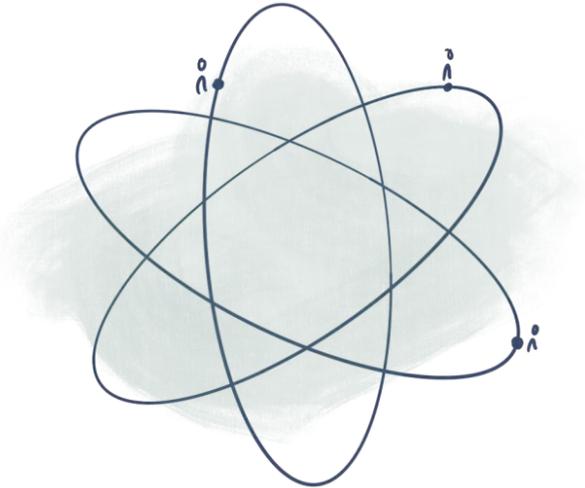
The base of a productive collaboration is a shared understanding. Especially in social innovation projects, multiple stakeholders are involved each with their perspective and way of thinking. Uncovering those perspectives and aligning on common ground builds a strong foundation.

# The process – Fruitful friction towards common ground

This process describes how friction can be used deliberately to find common ground in a fruitful way. Three main stages need to be considered – trigger, express and capture – here divided into five phases. In the co-creative session, each stage corresponds to one activity of the workshop.

## Phase 1 - Initial phase

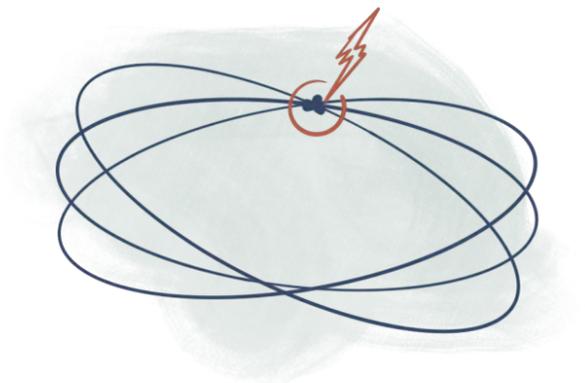
At the beginning of a new collaboration, there is no clear understanding, everything is blurry. Everyone maybe has a vague idea of the things that unite them and what makes them different but it is not yet expressed, nor is it very clear to themselves. Actors in the project have not deliberately talked about their goals and ambitions, their way of looking at the problem and solution.



## Trigger

### Phase 2 - Fruitful friction

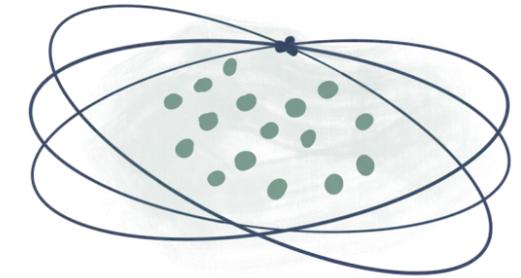
When actors come together friction should be triggered to make people aware and reflect on their way of thinking as well as how others think. This needs to happen in a safe space to allow it to be fruitful. This stage is focused on individuals personal reflection in interaction with others.



## Express

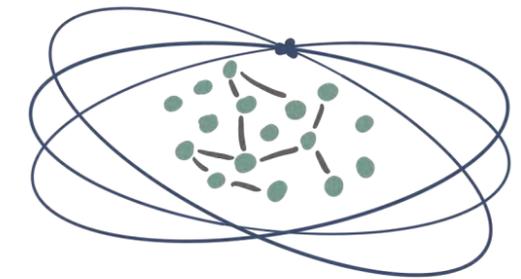
### Phase 3 - Express

This phase is about expressing the individuals perspective and acknowledge the different frames to identify similarities and differences.



### Phase 4 - Sense-making

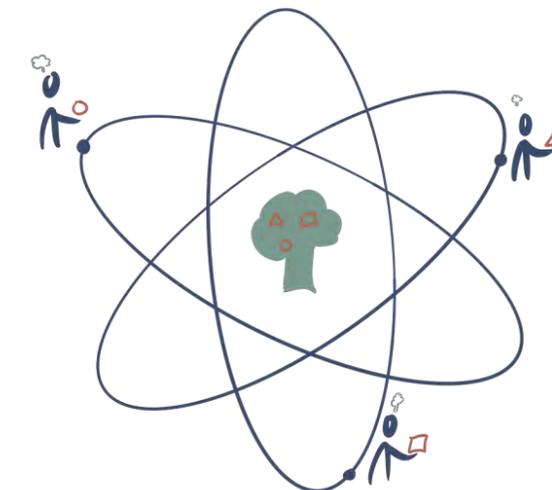
Being aware of the different viewpoints is what enables the collective sense-making where a new connection is made and new meaning is created.



## Capture

### Phase 5 - Capture

The newly formed common ground has to be captured in order to make it actionable for the project. Here is where a shared understanding is formed and co-created.



# **USING THE TOOLKIT**

A step-wise guide

# Introduction

The toolkit helps you to build your workshop to create a shared understanding with your stakeholder using fruitful friction. This part guides you through the process of preparing, planning, building and conducting the workshop.

## The workshop

The workshop consists of the three main stages as described in the process: trigger, express and capture. For each stage, there is one activity in the workshop. Additional to that you should do a welcoming & introduction as well as a closing of the session. In the workshop template, these steps are included and can be adjusted by you.

## Metaphor

For this workshop, the metaphor of sailing and exploring a new world is used. Metaphors are a great way to create an engaging and immersive experience. Besides, helps metaphorical language participants to express more implicit aspects like values, mindsets or beliefs. It can be easier to talk about difficult topics when you can express them through a metaphor.

Follow the instructions on the next pages to get ready to conduct your workshop.



# 1. Prepare

## What activities should you do here?

- **Map your stakeholders**
- **Identify need & focus for workshop**
- **Select participants**

Before you start planning the workshop you should think about the right moment, focus and participants for the workshop.

This is an important step to get the most out of the workshop and make it valuable for your project at the moment it is most useful. Doing an alignment workshop at an early stage can create a base for a productive collaboration where misunderstandings are overcome before they occur and become an issue.

First, you will map your stakeholders, then you will reflect upon the moment and topic that are currently relevant for the progress of your project and lastly, you will decide who to involve in the session.

### **#TIP**

Use the Miro preparation board for this part so that team members can also access it. Alternatively, you can also do the activities with this guidebook and a piece of paper.

Link to the Miro preparation board:  
[https://miro.com/app/board/o9J\\_IPQMMo8=](https://miro.com/app/board/o9J_IPQMMo8=/)

# Map your stakeholders

## Who are your stakeholders?

This workshop is especially apt for stakeholders that you have a close relationship or with whom you want to build a close relationship. In this part, you will identify with whom of your stakeholders this workshop could add value.

You can reflect on the questions below using the image on the right as a framework or use the preparation board for this activity.

### 1. Define stakeholder

Think about the stakeholders that are involved in your project or that you need/ want to involve. Write them down.

### 2. Map stakeholder

Look at the stakeholders you wrote down and try to place them in one the squares of the image on the next page. The questions below help you to decide where to place the stakeholder.



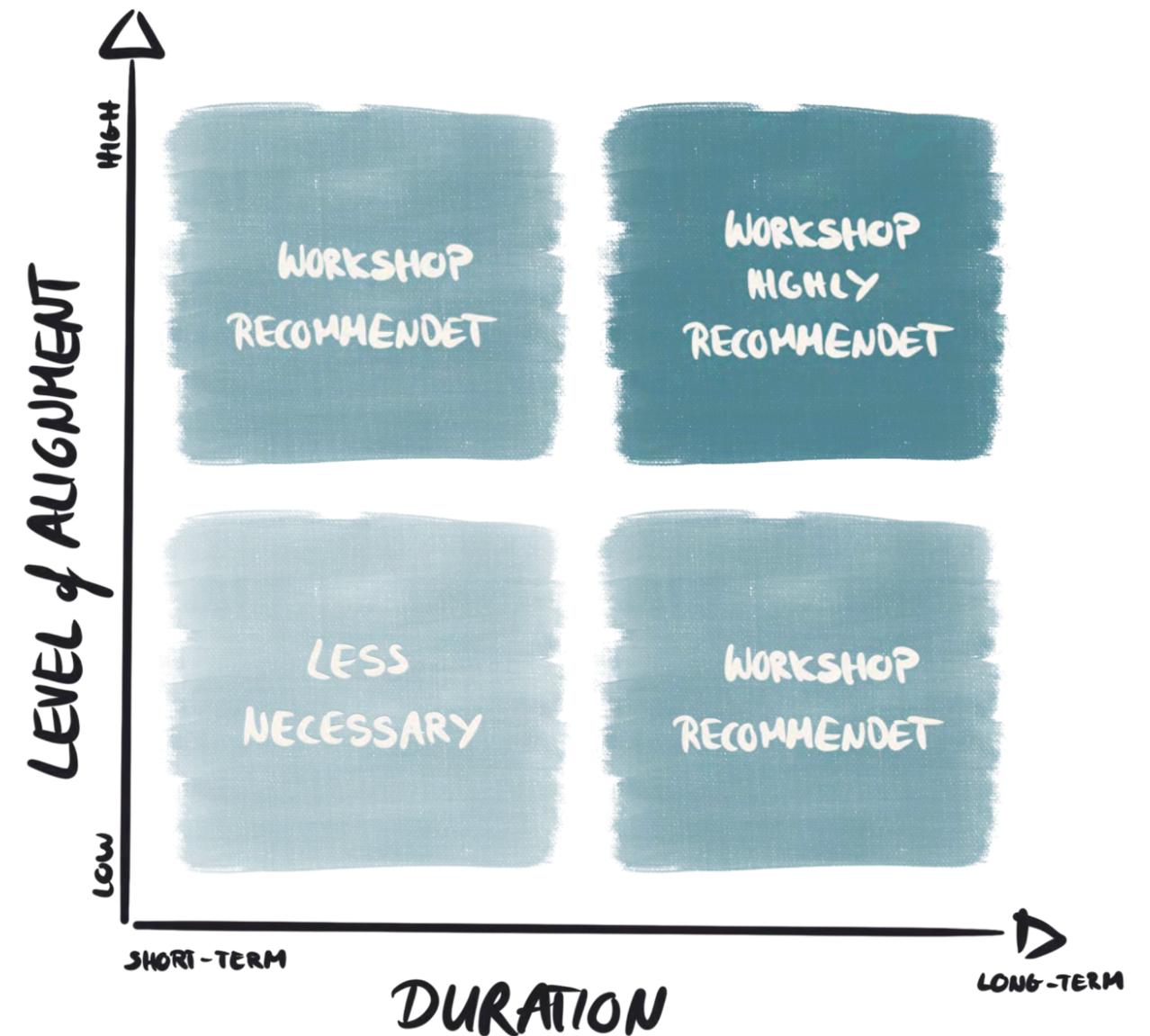
*How aligned are you already with your stakeholder? Is this a stakeholder that has the same overall goal as you (e.g. combat unemployment amongst youngsters)?*



*Is this a stakeholder you need/want to engage in a long term collaboration?*



*Is this a stakeholder you want to engage in a more participatory, collaborative approach?*



# Time and focus

## Should I do this workshop now?

This workshop can be useful in an early stage of the process but also during the project when you enter a new stage or when you experience tension that seems to have an underlying misunderstanding. It's important to think about the right moment to do this workshop and also about the topic or focus that you want this workshop to be.

Reflecting on the following questions will help you to assess whether it is a good moment in your project to conduct this workshop.

You can do this activity by answering the questions below on a piece of paper or use the preparation board section 'Prepare: Time and Focus'.

## Identifying the right moment

### Project stage

*Are you at the beginning phase of a new project?*

*Are you entering a new phase in your project?*

*Are you engaging a new stakeholder in a long-term collaboration?*

## Friction

*So far, did you experience tension in your project collaborations?*

*Did you experience misunderstandings regarding certain topics with your collaboration partner?*

*Which topics or situations caused tension and misunderstanding?*

If your answer to these questions is 'Yes' this workshop can help to align on common ground and prevent friction during the project.

## Identifying the main topic

### Common ground

Answer the following questions to identify what you want to align on with your stakeholder.

*Do you and your stakeholder have the same vision about the project?*

*Do you and your stakeholder have the same mission about the project?*

*Do you know your stakeholders perspective on*

*the project?*

*Do you use the same language?*

*Do you agree on the same path to unfold this project?*

*Do you think you are aligned with your stakeholder on important topics (e.g. goal, idea, finances, path)?*

*Do you know how you and your stakeholder want to interact?*

*Do you know the relationship your stakeholder wish to have with you?*

*Which topic do you consider most important to align on and create a shared understanding at the moment?*

*What are you most interested to get to know from your collaboration partner?*

If you answered with 'No' or you don't know the answer to the questions conducting this workshop can help to uncover the different perspectives and help you to create a shared understanding.

## #TIP

It can be useful to ask your teammates to also reflect on those questions and have a discussion about it to identify if others in the team also feel the need to align with your stakeholder and consider the same topics important.

# Select the participants

## Who should participate?

Now that you identified your most relevant stakeholders you should think about the participants for the workshop.

For an online session, it is recommended to have no more than five participants.

Reflecting on the following questions shall help you to choose the right participants for the session.

Think about the topic that you want to address and then which stakeholders that you mapped before should be involved in the session.

*Do you want to align with multiple stakeholders from different organisations or is there one specific organisation?*

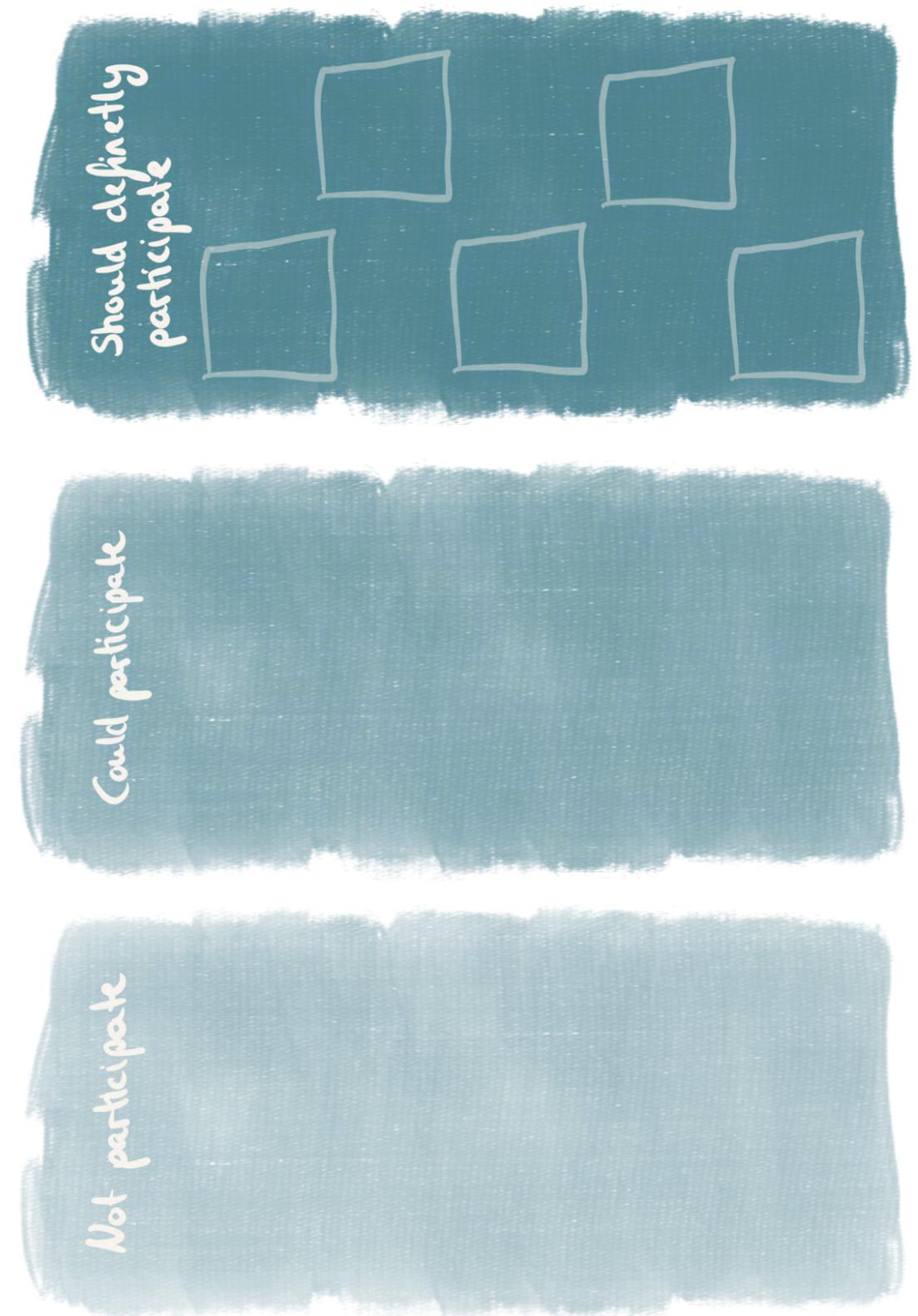
*With which people of the organisation is it most important to be aligned?*

*To whom is it most interesting to understand the perspective?*

*With whom is it most crucial to have a shared understanding?*

## #TIP

Here it can help to think about the people that have a lot of influence on your project. Which means they need a good understanding of your project's ambitions. Think about the stakeholders where having a shared understanding is beneficial for the collaboration.



## 2. Plan

### What activities should you do here?

- Set date and time
- Invite & inform participants
- Get Miro subscription

Now that you know who you want to involve and what the focus should be it's time to plan the session.

#### Workshop practicalities

##### Duration

This workshop takes about 1,5 - 2 hours depending on the number of participants involved. However, it is recommended to plan 30 min more because from experience, things always take longer than expected and it would be a shame if you could not do the last step of the workshop due to time limits.

##### #TIP

It is better to do a workshop like this early in the week and in the morning since the energy level is usually higher and people still have more concentration than on a Friday afternoon.

##### Requirements

This online workshop is set up in Miro. To have access to all applications of Miro you need to get a subscription. This will allow you to invite guest editors (your participants) by sharing the link and they can access the board without registration. In addition, a subscription offers a lot of features that will ease the facilitation of an online collaboration session.

See also: <https://miro.com/pricing/>

## 3. Build

### What activities should you do here?

- **Choose or build your trigger activity**
- **Define or adjust probing questions for express activity**
- **Define or adjust focus and probing questions for capturing activity**

It's time to build the workshop.

Through the workshop, participants are guided along a journey with three main stages. Each of the stages corresponds to one of the fruitful friction towards common ground process stages combined with the sailing metaphor:

Trigger → Getting ready

Express → Preparing the mission

Capture → Exploring the new world

There are two ways to prepare the workshop.

Option 1

If you just want to make small changes to the workshop template you can do that directly in the workshop template. A small explanation about this board can be found on the next pages.

Option 2

If you want to do bigger changes to the workshop setup and learn more about how to build and design the three activities you can use 'Build' section of the Miro preparation board. An explanation about the elements that you will find there is given here after the overview of the workshop template.

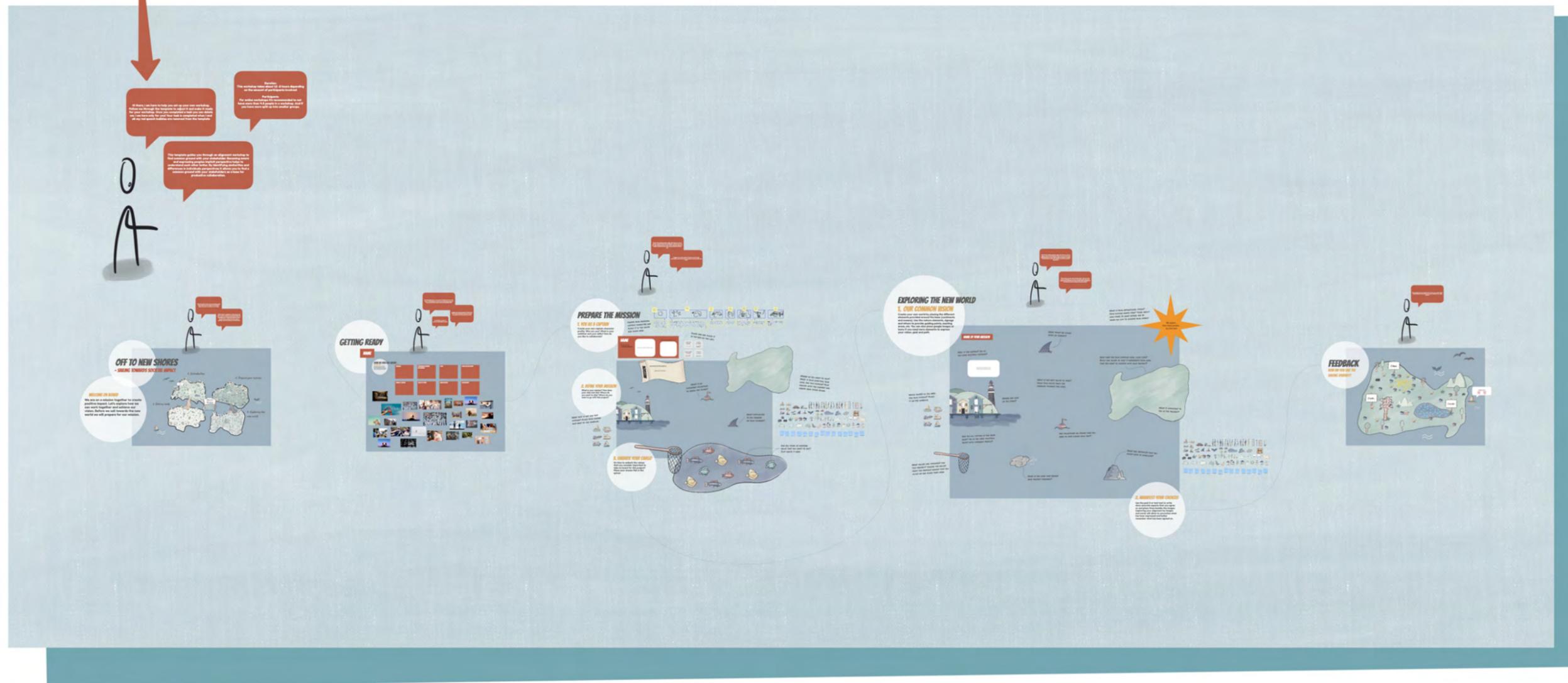
Now, the workshop template is explained and then you will be guided through the different steps to build and design the workshop activities yourself.

# Overview workshop template

**START HERE**

**WORKSHOP**  
**ARE WE ON THE SAME PAGE?**  
A TOOL THAT ENABLES SOCIAL INNOVATORS & THEIR STAKEHOLDERS  
REACH COMMON GROUND USING FRUITFUL FRICTION.

**Workshop template - Are we on the same page?**  
This is how the Miro template looks like. You will use this template for the workshop session. But first, you need to adjust it to fit your needs.



# Introduction and closing boards

## Introduction & welcome screen

This is the welcome screen where you present the agenda and goal of the workshop. It's also nice to do a check-in to understand what people expect from the workshop or how they feel.



## Closing & feedback screen

The last part of the workshop is the closing and feedback island. Here is where you can wrap up the session and get feedback from the participants. You can do a check-out at the end to understand what participants take from the session.

# Other elements

## Building blocks

For the express and capture activity, there are elements that participants can use to build and express their point of view/ capture common ground. They help to allow participants to express their point of view playfully. This is a general collection tailored to the sailing metaphor. If you choose to change the metaphor you might have to change and add new elements.



## Assistant

This is your assistant guiding you through the Miro workshop template. The assistant will help you to adjust the Miro board, give you tips and tell you how you can customise the workshop template. Once your board is ready for the session you can delete all the speech bubbles and the assistant.



# 1 TRIGGER

## What is it?

**A TRIGGER is a warm-up exercise to trigger people to become aware of their way of thinking in general & see how others think. The goal of the trigger to nudge people out of their comfort zone into the learning zone to make them open for change.**

## What is it for?

- **Awareness about your own and others way of thinking, their perspective.**
- **Reveal similarities and differences amongst peoples way of thinking.**

The trigger is the first activity of the workshop after the welcoming and introduction. This activity is not necessarily directly related to the project but more focused on general ways of thinking and perceiving certain aspects of each individual.

Depending on what you are interested in getting to know from your stakeholders a different trigger can be chosen or build.

In the following pages, you will get an overview of the triggers and some tips on what to consider when adjusting or building a trigger.

Those examples can also be found in the Miro preparation board where you can directly change them and then copy them to the Miro workshop template.

# Fruitful trigger

The goal of this activity is to trigger friction in a fruitful way. This means that people should feel comfortable and safe to express their personal perspective without feeling judged or offended. There are different ways to trigger people to reflect, become aware of their own and also others way of thinking. When choosing a trigger it is important to think about what this trigger will uncover and if this aligns with what you want to know from your participants. It is also crucial to think about the images and elements you use for this activity since a persons' background and previous experience can influence how they react and how pleasant they experience the activity. When choosing and changing a trigger you should keep your participants and their background in mind.

## REMEMBER!

You want to nudge people into the learning zone but not offend or judge them.

# Tips

**When you design or change a trigger, there are things that you should consider!**

**Designing triggers for fruitful friction is about...**

## Balance provocation

- Should not be offensive

## Don't get personal, remained factual

- Relatable but not personal
- Friction should be triggered on a factual and not personal level

## Balance comfort zone

- Save space to allow people to comfortably move out of their comfort zone

## Awareness about topic and medium

- Is it the topic e.g. on the image, that should create friction or the artefact?
- Is the friction targeted at you or the artefact?

## Consider context and group

- Every person reacts differently, personal background and previous experiences influence how people react when facing friction

## Asking Why?

- The conversation about the trigger is what makes people express their way of thinking

# Examples

## Possible means to trigger friction...

Here you will find some examples of triggers you can choose from for your own workshop. An explanation will be given of what they focus on in-form your decision.

### Dilemmas

- Present people with choices they have to make.
- They work to make people argue with themselves about their perspective.
- Think about dilemmas related to your project or focus that you can present participants with.

**WOULD YOU RATHER**

**BE FEARED BY ALL**   **LOVED BY ALL**

**NEVER GET ANGRY**   **NEVER BE ENVIOUS**

**HAVE A HORRIBLY CORRUPT GOVERNMENT**   **NO GOVERNMENT**

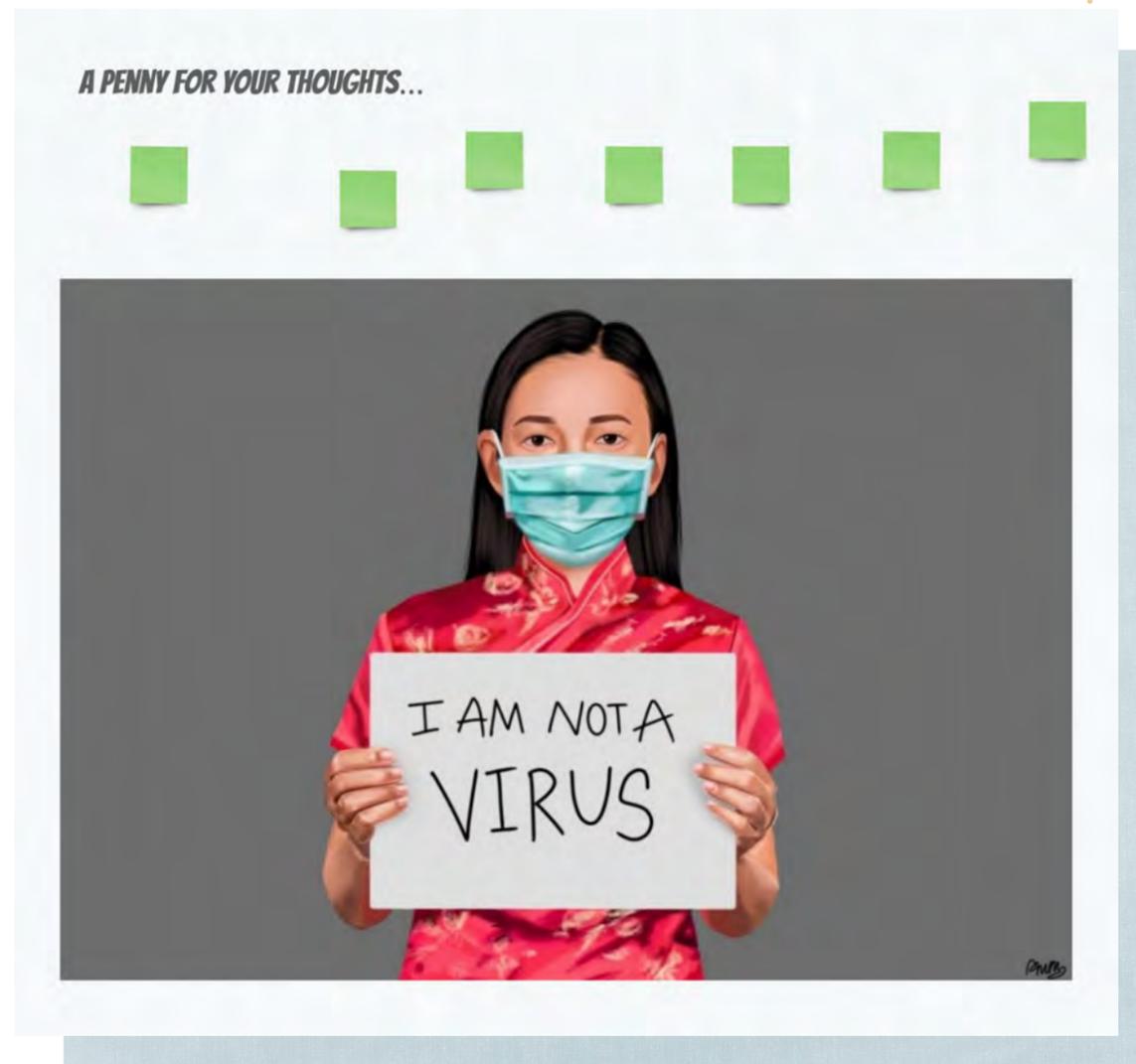
**KNOW THE UNCOMFORTABLE TRUTH**   **BELIEVE A COMFORTING LIE**

The image shows a 'Would You Rather' activity card with four dilemmas. Each dilemma is presented as a horizontal bar with a yellow segment in the middle, indicating a choice. The dilemmas are: 1. BE FEARED BY ALL vs LOVED BY ALL (yellow segment on the right). 2. NEVER GET ANGRY vs NEVER BE ENVIOUS (yellow segment on the right). 3. HAVE A HORRIBLY CORRUPT GOVERNMENT vs NO GOVERNMENT (yellow segment on the right). 4. KNOW THE UNCOMFORTABLE TRUTH vs BELIEVE A COMFORTING LIE (yellow segment on the right).

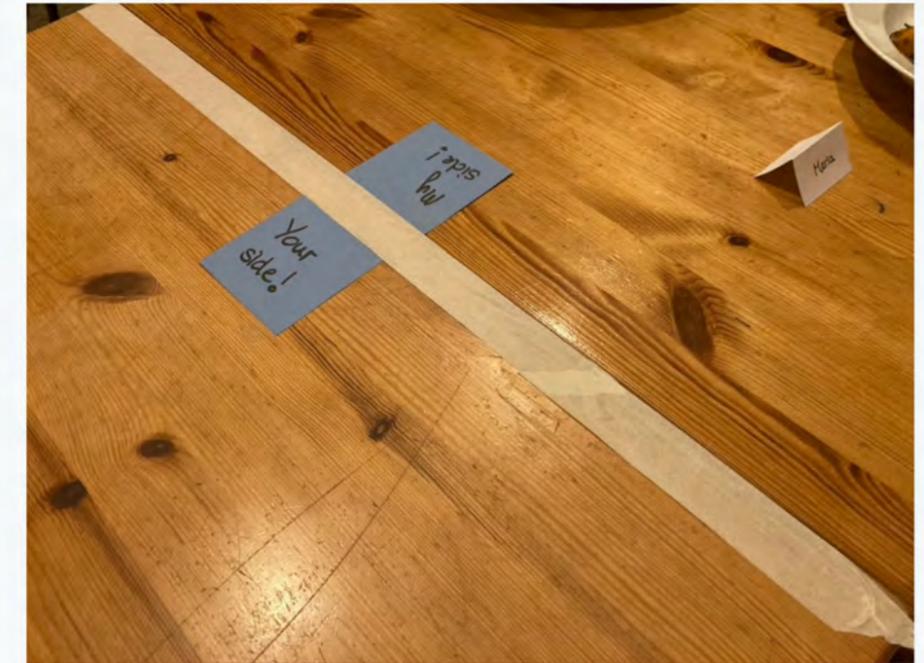


## Provocations

- Present people with a provocative image and ask them to reflect on their thoughts.
- This can be useful if there is a very specific topic that you want to address and your participants think of.
- Keep in mind that it should not be offensive!



HOW CAN WE COME TOGETHER  
TO CREATE OUR SIDE?



## Spacial provocation/ irritation

- A change in the physical environment can be a way to irritate and let people reflect.
- This can be a very literal representation of the issue at hand without targeting people personally and can be used as a metaphor for the barrier that needs to be overcome.
- The reaction and feelings of people should be addressed and discussed.

# 2 EXPRESS

## What is it?

**EXPRESSING** is individual activity to give people time to reflect on their stand regarding the project and allow them to express and share their perspective with the group.

## What is it for?

- **Unlock similarities and differences regarding the perspective on the project.**
- **Allow all opinions and point of views to be heard.**

In the workshop, this activity is linked with the metaphor of 'Preparing the Mission'. Here, each individual creates their vision of the mission, builds a destination island (goal), defines the values and how to best get there. The building blocks facilitate articulating more tacit knowledge and concepts.

This is where you will find out how people see your project what they expect from it and the collaboration. You might find out that you have a very similar or very contrary point of view.

Often, it is not easy for people to talk about abstract and future-oriented topics as well as values or implicit aspects. The metaphor and playful elements of this activity aid people to put their thoughts into words. There are certain aspects that you need to keep in mind so check out the tips and examples on the next pages.

# Tips

## Allowing people to express implicit aspects can be facilitated by...

### Using metaphors or analogies

- Abstraction can help people to express tacit perspectives

### Providing a frame (working space)

- Giving people a dedicated working space gives structure and aid them to express, manifest their thoughts

### Encourage playfulness

- Provide building blocks (e.g. icons)
- Imperfection probes interaction

### Encourage thinking and acting visually

- Use metaphorical language
- Use images, scribbles, icons
- Let people sketch (on paper)

### Time to reflect and express individually

- Dedicate time for individual reflection before engaging in co-creation

# Examples

## Possible means to facilitate articulation...

Here, are some examples that can help people to express themselves in a more light and playful way. See how it is done in the workshop template here:

- 1 Collection of images**
  - Give people some images they can choose from.
  - Figures as building blocks
  - Having figures (e.g. drawings, icons) allows people to tell a story without having to draw themselves.
- 2 Workshop theme/ metaphor**
  - Giving the whole workshop a theme or packing it into a metaphor allows to create an immersive and more engaging experience.
- 3 Probing text/ questions**
  - Putting questions and starting a sentence helps participants think in different directions and overcome the fear of writing on a blank paper.

## 4 Using visuals and text

- Use visual stimuli as well as text (images, icons, drawings, post-it's, etc.) to facilitate a playful and light environment where people feel at ease to be creative and express themselves in different forms.

## 5 Make it personal

- Writing down the names of the participants to the corresponding board to give it a personal feeling and that this is their safe space to express their very personal perspective

# PREPARE THE MISSION

## 1. YOU AS A CAPTAIN

Create your own captain character profile. Who are you? What is your ambition and your skills? How do you like to collaborate?

CREATE YOUR PERSONAL CAPTAIN CHARACTER AND PLACE IT IN THE WHITE BOX DOWN HERE.

**NAME**

My special skill is...  
...write your skill here

When working with my crew...

Place your captain character here

CHOOSE ONE AND PLACE IT IN THE BOX ON THE LEFT.

- I LIKE TO BE MENTORED
- I LIKE TO CO-CREATE
- I LIKE TO LISTEN AND LEARN
- I LIKE TO CO-DECIDE

## 1 Collection of images

Choose the shape of your face

Find your best look

How to your eye expression looks

How do you think best to your personality

Find the shape of your lips

Are you a go with a beard?

Are you looking at your ambition?

Make it personal

## 5

**MISSION**

My mission for this project is...

...place your text here...

WHAT IS AN IMPORTANT MILESTONE TO REACH THE ISLAND?

## 2 Workshop theme/ metaphor

## 3 Probing text/ questions

WHAT DIFFICULTIES TO YOU FORESEE ON YOUR JOURNEY?

WHERE DO YOU WANT TO SHIP? WHAT IS YOUR AMBITION, YOUR GOAL FOR THIS MISSION? PLAY AROUND WITH THE CONTENT AND CREATE YOUR VISION ISLAND.

## 1 Collection of images



CAN YOU THINK OF ANOTHER VALUE THAT YOU WANT TO ADD? JUST WRITE IT HERE

## 2. DEFINE YOUR MISSION

What is your mission? How does your ship look like? Where do you want to ship? Where do you want to go with this project?

WHAT SHIP IS APT FOR THIS MISSION? PLACE YOUR CHOSEN SHIP NEXT TO THE HARBOUR.



## 1 Collection of images

## 3. EMBARK YOUR CARGO

It's time to embark the values that you consider important to take on board for this project? Place your chosen fish in the quiver.

Using visuals and text

# 3 CAPTURE

## What is it?

**CAPTURING** is a collaborative activity to align on project aspects and develop a shared understanding.

## What is it for?

Co-create a shared understanding and a collective vision that builds the common ground for your collaboration.

Capturing is a similar activity like 'Express' with the difference that now you all work together on one board and co-create the shared understanding. This part is about aligning and finding a common ground.

Here, you together explore the new world and define where you want to go, how you can best get there and also what obstacles and issues might occur during the journey. The focus of this activity is to use the similarities that were uncovered before to negotiate a common ground. In the end, you will have a common vision statement, a goal island and directions on how the journey to reach this will be, agreed upon with all participants.

# Tips

## A shared understanding can be facilitated by...

### Co-creation of a shared understanding

- Fruitful discussions
- Emphasis on the process not the outcome

### Having a facilitator

- Neutral party
- Guiding the process

### Manifesting common ground

- Providing a frame or structure in which common ground can be captured
- Using scenarios or storytelling
- Using metaphors
- Using visuals

### Actionable building blocks

- Combining text and visuals helps to reduce the level of abstraction

# Examples

## Possible means to facilitate capturing...

Since this activity is similar to the previous one the same means that help individuals to express themselves can be used to negotiate a common ground. But, when capturing a shared understanding some other aspects should be considered as well.

- 1 Concretise**
  - Probe people to very concretely agree on e.g. a vision statement regarding the project
- 2 Converge**
  - Have aspects where the elements from the individual boards need to be converged into a joint one
- 3 Change the language**
  - Use we/us/ our now when probing and writing to emphasise that this is a joint outcome.

# EXPLORING THE NEW WORLD

## OUR COMMON VISION

Create your common world by placing the different elements provided around the base (continents and oceans). Use the nature elements, signage and others to provide guiding points, meeting areas, etc. You can also place google images or icons if you need more elements to express your vision, goal and path.

### 3 Change the language

NAME OF OUR MISSION

WHO IS THE CAPTAIN? OR DO WE HAVE MULTIPLE CAPTAINS?

Copy paste the captains faces from the previous board here

WHAT MIGHT BE HIDDEN RISKS OR THREATS?



WHAT IS OUR ASPIRATIONAL VISION? OUR GUIDING NORTH STAR? THINK ABOUT HOW MANY, TO WHAT EXTEND AND BY WHEN YOU AIM TO ACHIEVE YOUR IMPACT.

### 1 Concretise

We aspire... that many people... by that time

HOW DOES OUR COMMON GOAL LOOK LIKE? BUILD THE ISLAND SO THAT IT REPRESENTS YOUR JOINT GOAL THAT YOU WANT TO ACHIEVE WITH YOUR PROJECT?



WHAT IS IMPORTANT TO YOU IN THE PROJECT?

WHICH SHIP(S) DO WE NEED FOR OUR MISSION? PLACE IT ON THE HARBOUR.



WHERE AND HOW DO WE START?

WHAT IS THE BEST ROUTE TO TAKE? DRAW YOUR ROUTE FROM THE HARBOUR TOWARDS THE GOAL.



ANY MILESTONES OR STAGES THAT WE NEED TO PASS DURING OUR TRIP?

ARE WE ALL SITTING IN THE SAME BOAT? OR DO WE NEED MULTIPLE BOATS WITH DIFFERENT PEOPLE?

WHAT VALUES ARE IMPORTANT FOR THIS PROJECT? CHOOSE THE VALUES FROM THE PREVIOUS BOARDS THAT YOU ALIGN ON AND PLACE THEM HERE.



WHAT IS THE WIND THAT BRINGS OUR PROJECT FORWARD?

WHAT ARE OBSTACLES THAT WE MIGHT HAVE TO OVERCOME?



### 2 Converge

#### MANIFEST YOUR CHOICES

Use the post it or text tool to write done concrete aspects that you agree on and place them besides the images. Capturing your alignment by images and words will allow to concretise what has been expressed and better remember what has been agreed on.

## 4. Conduct

Now that your Miro board is ready for the workshop, your participants are invited it's time to think about practicalities during the workshop. Here you will get information about what to consider when facilitating the workshop.

### TRIGGER

#### Practicalities

##### Individual activity

This is an individual activity, each participant should have their **own space in Miro** to do this activity. Afterwards, each participant shares with the group what they have done and why.

##### Duration

**20 min. in total** (with five participants): 5-7 min to let participants do the activity individually and then 3 min each participant to share with the group.

##### Facilitator

As the facilitator, you should ask **'Why?'** to try to uncover the reasons behind the persons' choices. Why did people chose certain images, sides or wrote a specific aspect down?

### #TIP

In addition to the time people spend on doing the activity you should plan time for explaining the activity and for people to ask questions.

### EXPRESS

#### Practicalities

##### Individual activity

This is an individual activity, each participant should have their **own space** in Miro to do this activity. Afterwards, each participant shares with the group what they have done and why.

##### Duration

**40 min. in total** (with five participants): 15 min individual work then 5 min each to share with the group what they have built.

##### Facilitator

In this activity, the facilitator can ask probing questions while participants are filling in the board and **highlight similarities and differences** when people present their perspective.

### Capture

#### Practicalities

##### Group activity

This is a group activity where you **co-create your shared understanding**. All participants work together on the same board.

##### Duration

**25 min. in total** (with five participants): 20 min group work then 5 min concluding what they have agreed on.

##### Facilitator

In this step, the role of the facilitator is crucial to **mediate the co-creation** and make sure that all people's contribution is recognised and discussed. What can happen is that one person takes the lead and decides for the group. To avoid this it's the role of the facilitator to address and ask people about their opinion. A good way to do so is to refer back to what the person has presented in the previous activity.

# Tips facilitator

Holding session online is a bit different than being in the same room. Here are some general tips and some remote specific tips for the facilitator.

## General tips

### Be neutral

Ideally, the facilitator is not participating content-wise in the workshop and stays neutral.

### Ask why?

Ask why to identify the reason behind and probe people with questions to ladder their perspective.

### Speaking time

Being strict about time and giving each person specific moments to speak ensures that everybody has the same amount of time to talk and avoids that one person takes over.

### Test run

If you facilitate an (online) session for the first time it's advised to a test run with your colleagues for example to get yourself more comfortable in the facilitator role.

## Online facilitation

### Miro introduction

In case your participants have little experience with online creative sessions give them a small introduction to Miro at the beginning of the session.

### You choose who speaks

Ask people directly to give their opinion and make sure everybody gets heard. Online it's more difficult to see who wants to speak so it is best if the facilitator directly addresses and chooses people to share.

### Visual feedback

Since not everybody can talk at the same time online it's best to ask participants to show that they need help or are done with the activity, e.g. by waving in the camera.

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**Are we on the same page? Toolkit**

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