

## 4.6.11 Certification – Design Team, Conference Call

**Participants** – George (chair and facilitator), Sunny (technical support), Dennis, Marilyn, Jane

### Review the Certification – Design Team Task Assignment from San Antonio, 1.31.11

**Decision:** Create a task force to increase and enhance design capacity for certification candidates.

#### Action Steps for 2011

1. Design content in spiral/scaffold form that addresses:
  - Shared features of design
  - Shared assumptions
  - Design questions asked of each approach
  - Ways of using methods in each approach
2. Create Mechanisms of delivery (modify current courses, use already existing or invent a new.) that match learners readiness and inquiry process
3. Share and Identify current courses and current enhancements relation to design
4. Meet Jo and Wayne and debrief at this meeting

#### Other Actions

1. Modify TFM
  - Overview of group's journey and where methods fit
  - Publicity on Certification
2. Put up poster to collect input from the flock (probably in Certification TF notes)
  - What are the design courses currently being offered?
  - What are the modifications to TFM that support design concepts?
3. Develop design course and start tomorrow.

#### Questions

Are we looking at one ToP design methodology or different design methodologies that may be appropriate at different times?

MO: It would be helpful if team came up with a ToP design methodology because it has xyz components - acknowledging different design methodologies exist. Would like one methodology and one vocabulary around ToP design - something we could agree on.

#### George's Questions in Preparation for our Meeting

- Does this set of recommended actions give us sufficient direction or do we need to consider any other big steps?
- How do we attach various ideas to other key elements so that our work focuses on key outputs the biggest may well be a new course?
- What are other ways to consolidate our work other than a course?

NOTE: that is not to deny a course being developed, but rather for us not to miss some other agenda that might be important.

## To Do's - Immediate Next Steps

- **George** On next session, in about a month - think about meeting once a month by phone until July - come back with some pieces of our model put together to share.
- **George** Check with Mary re getting budget support for a retreat.
- **All** Next Meeting - May 9th - daytime – 12 pm, 1pm, 2pm(P/M/C)
- **Jane** Invite Jo/Wayne for 1/2 hour on their approach to teaching design? What is it they are teaching about design - what do they consider it to be?
- **George** Share a 3-page paper from Jo and Wayne on Design with all of us.
- **George** Will interview Jane and look at past materials of what we have said in terms of the range of design - way we use the word and different definitions.
- **Sunny** Review my curriculum to see what might be relevant to share.

## Opening Conversation - What has happened re Certification you can share?

- Sunny Walker Many files at groupsite
- Sunny Walker First meeting of virtual certification cohort - includes MN, DC, WA, CA
- Sunny Walker Assessor script changes have been done - isn't public. Marilyn will distribute it when there is another certification event.
- Sunny Walker Files are at MTOP groupsite, NOT TTN.
- Sunny Walker Jane's certification group has met twice recently. They are having some trouble having good, rich experiences doing strategic planning - they are doing modified versions (1-day, etc.)
- Sunny Walker The issue is with opportunities to do a full-blown SP - or groups unwilling to put in the time to do SP. Sometimes they say they want it, but really need something else.
- Sunny Walker New Guide is at ICA-USA awaiting launch of new website to be uploaded.

## What do we hope to accomplish today?

- Sunny Walker: LOOKING AT THE RECOMMENDATION FROM SAN ANTONIO TO THE LEFT, WHAT DO YOU HOPE WE ACCOMPLISH TODAY?
- Jane An agenda for our work together on our task
- Marilyn Oyler Craft our intention between now and Jan 2012
- George Packard Clarifying what is the priority through which the peripheral items will be accomplished

## Discussion Notes

GP: Are we try and find a something universally applicable that can be modified?

MO: We muddled with cards and markers and the book Winning Through Participation said a workshop has 5 steps and we all bowed down. So looking for a similar framework for ToP design. I think it is accessible. We could pull together data we have and ways to approach design.

GP: different situations and stages still relevant, but looking for the basic model out of which we then do themes and variations.

JS: Not sure it is easy to come up with "a way". Canada (ICA Associates) has done ladder training for design. So I don't know if it's just "a thing" or not. Note that MO is introducing MToP to the ICAA "design eye" as a way to think about design. And there has also been talk about Kalaidascope design. Something more integrated would be

useful. Shannon is looking at design of large-scale change projects - the other two approaches might be components, but it's bigger.

MO: The Annual Meeting study of a book on process design is describing something much larger.

GP: There is a question of design in the design conference, another question of design in planning the session - different questions of design - so is there a base or method or process out of which each of those can take place. The Design Eye is more of a design conference type of question, looking at the overall pieces vs. only one session. The book defined categories until the last chapter and seemed to end without it all being pulled together.

DJ: One image that occurs to me - having a way to speak to different parts of design (laddered training) - the image in strategic planning and MToP - the dynamics of planning,. We are looking for some kind of a macro of key elements we are looking at when talking about design.

SW: part of our responsibility is to figure out how those being certified are competent in design

JS: And it is also part of finding opportunities for those on the certification journey to learn about design

MO: We ask "show us your design for..." or use "procedures" - and have used the word at multiple levels. We have used it to mean both "design a conversation" and "design a 3-day multi-cultural event" (for example)

GP - even with the Design Eye and Kalaidascope have common elements behind them. But at a finer point, even with a different set of questions, they still involve the same realities, the dynamics of people, process...are part of it.

Conundrum (sp?) - different ways we've used the word and also - what exactly is our objective?

MO: I struggle with the difference between "design" if I am facilitating and "design" if I am training. It seems important to clarify these things - identify it as either a facilitation design or a training design.

JS: It's an important distinction, but in certification, it would be a facilitation design

GP: an obvious distinction?

MO: One is the message I'm sending - Rational Intent in the training is "they learn ..." and in facilitation "they collectively create x kind of product". SO I have more ownership of the message delivered in a training.

Is the distinction an action item? Probably more a point of understanding in talking about design.

Is there an action item for clarifying different definitions of design? MO: This falls into 2011 Action Step 1.

JS: is it feasible to look at the layers of design? And do it online? It helps to see it together.

DJ: feels like a big ocean - I know I can be helpful with a group in working on design. WHAT IS DRIVING THIS?

JS: I remember we talked about this question and whether or not it should go to the curriculum team to work on. I recollect that even though it is a bigger topic than what we might normally think about, because we are holding so much knowledge around what we mean by design skills, we would be the ones to approach it. And not just the competencies, but part of our mission in the team is that there are appropriate courses, etc. for people to gain the skills required for certification.

MO: My passion in this is trying to put together like the MToP curriculum or wherever we are moving in advanced skills training - where do we stand collectively - not too helpful to have a lot of competing formats. So maybe the best first place to "vet" a design approach, the assessors would it. What is our chapter in the book on design? WOULD like more of it in MToP - it's in several places and doesn't feel integrated. And from how I design things with a client, I do have a way of putting it together, but not sure what that is about - is it experience mainly? A newbie doesn't have that. So how do I support someone new in this that creates a skill of "effective participatory design."

GP: If we set as a target, or answer to what to do this year, coming up with an alpha test of a product next January for the assessors, would that hold it? (MO=yes) Or a beta. What struck me as MO was talking, a phrase that holds what Jane was pointing to is: Is there such a thing not of components of design but of a continuum of design

depending on the complexity of the task? Different things for different situations, but also another session in a course we could teach.

MO: The picture in my mind is like a spiral where the top is small and it gets bigger as it goes down. We are trying to craft an understanding that is the generic and simplest version - then come down the spiral another rung or two. BUild common vocabulary around the first level and after that 2-3 levels down in complexity.

DJ: There are dynamics that are the same at each level.

GP: course as final product

JS: Not sure that is true. Judy feels strongly she'd like to see a design course. BUT we need to know more what we are talking about before we see a course as the option. There are courses out there already. What can we do in terms of building some design work into each level of training - another revelation about design.

GP: Is there a product that would focus or be the window through which all the other agenda pieces might flow?

JS: The incorporation of some elements into current courses, but first have to understand the model.

MO: Pick up on something Jane suggested - doing some sort of retreat, a F2F gathering around this question - just noodle together and thrash out something. Is there money in a budget that would support this, or just volunteer to work on it?

JS: George & Elise will be in CA in July 12-14, on a weekend, maybe engage Shannon and use her offices. Might be funds in ToP Network budget.

DJ: doing a course with Heidi July 20-21. In Omaha b/4

MO: tied up in MToP until 19th Maybe weekend could be between those two anchored courses.

JS: May be in Santa Fe - not definite. Could host or find a room to spread out

Dates July 16-17 (Sat/Sun) - ask for some budget support.

We would likely get further with 2-3 days together.

Have the conversations with other countries before or after the retreat? MO: not until we have our own model or framework. JS: would like to hear it before that as input into our thinking.

DJ: Helpful starting point to say what do I know about this, and what do I NOT know about this (leaning toward MO's approach) - but also jazzed by others' ideas.

GP: Model, conversations, model, conversations, model conversations - iterative process/evolution of something.

There's a set of questions at the heart of design, and need to ask them and get all that information even as we create a model.

DJ: not an either/or thing - feel free to gather information, and when we have a framework, we share it and get the next level of dialogue.

MO: As we talk with people now, I'm talking from MY framework of design, others talk from THEIR framework. I'd rather we talk from a shared framework. No matter how clear or unclear we are, each of us has a picture and a set of assumptions.

JS: When I talked with Jo and Wayne, it provided some context for me to talk about a design framework. I'm so boggled it was hard to think about it. Talking to others might help us get started. One image that is more comfortable for me than doing a course is "writing the chapter" or pulling together a body of knowledge. (several "nods" to that).

Once we come up with something, really important to get it out to our larger community for feedback and input. We will have something in a stage of gestation vs. a complete product.

DJ: This is how innovation happens. Starts with a eureka moment, then many add and change and learn - we'll have several aha eureka moments!

### **Next Steps – Reasonable things to do between now and July**

- George Packard Clarify our uses of the word design and the range or continuum of design
- Sunny Walker Get copies of any design curriculum or components that now exist.
- Marilyn Oyler Create a budget and set up a retreat for 2 days
- Sunny Walker Get a strong agenda for the upcoming July meeting.
- George Packard Outline for the meeting in July
- Jane Include some prep with other countries about what they are doing with design
- Sunny Walker interviews with Canada, Australia, Taiwan, JW's interview with Jim Campbell
- Sunny Walker Review all materials at Groupsite.
- George Packard Figure where they fit in to the ladder of design
- George Packard What do I know and what not know

### **Evaluation of Meeting Comments**

#### **What Worked Well**

- George Packard The Audio worked well for the most part
- Dennis Jennings Georges' agenda and forethought on this
- Dennis Jennings Sunny's hosting and notetaking
- George Packard The dramatization via our own discussion of the many senses of design
- Marilyn Oyler The preparation was very helpful from Sunny and George
- Sunny Walker The conversation around "what the heck is this?" was insightful for me.

#### **Suggestions for Improvement**

- George Packard A Better agenda would be helpful
- Dennis Jennings Just the simple reminders of hand raising and indication " I am complete" to avoid the talking over one another
- Marilyn Oyler Clarify the difference between Hi Def phone and Skype. I still don't quite get how to use Skype. Is the hi def phone free?
- Jane An earlier agenda to be able to prepare.

#### **Other Comments**

- George Packard Thank you Sunny for your set up
- Dennis Jennings Continually grateful for the concern, passion and collegueship even when it is on line
- Sunny Walker Wrestling with the fact that I had totally spaced I had signed up for this, but DELIGHTED in the team!
- Jane: Sunny and George thanks for preparing and leading. Marilyn thanks for prompting George that he is OUR CHAIR.