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**Aboriginal Business Development Centre
Aboriginal Community Development Centre
“Action Is The Key”**

Provincial Aboriginal Business of the Year – 1999
National Economic Developer of the Year Award - 2002

It is our pleasure to welcome you to the “National Network for Urban Aboriginal Economic Development” and to our inaugural National Gathering. We expect that you are ready to roll up your sleeves to work collectively to develop the network’s action plans and to help form Learning Circles.

To begin, we would like to acknowledge that we are meeting in Algonquin traditional territory.

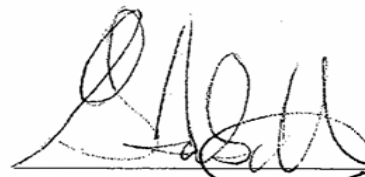
Our purpose is to develop an open, welcoming, and inclusive national network of researchers, practitioners, and policy makers working in urban Aboriginal communities. We know the challenges our communities face each day, and we know that there can be strength in working together and taking advantage of our diverse skills and knowledge. The network can help us focus on effective community and economic development to improve people’s lives.

The network already includes more than 70 people and 25 organizations across Canada. It is coordinated by Greg Halseth from UNBC’s Community Development Institute and Ray Gerow from the Prince George Aboriginal Business and Community Development Centre. Over the next two days we hope to start the process of building the network, and of fostering a better understanding of the challenges we face and the opportunities we can bring forward. We also hope to start the process of sharing knowledge to help our communities by establishing local Learning Circles to facilitate knowledge exchange and capacity building. There will be no ‘spectators’ at this National Gathering – we have much to do and much to learn from one another.

In closing, we are pleased to acknowledge funding support from the Social Sciences and Humanities Research Council of Canada (through their Knowledge Impact in Society program) and from the Office of the Federal Interlocutor within Indian and Northern Affairs Canada. Most of all, we acknowledge and respect the time that you have contributed by being here – we know that the strength of the network will be through its people!

Sincerely,



Ray Gerow

Greg Halseth

Project Overview and Purpose:

Aboriginal communities in Canada today are undergoing a dramatic shift. More and more, the Aboriginal community has an urban dimension, as Aboriginal people take up residence in cities and towns, or move back and forth between urban areas and their traditional territories. The reality today is that the majority of Aboriginal people now reside off-reserve, in cities or in regional centres, and increasingly see urban centres as places to build community, fashion a life, and find ways to maintain and deepen distinct Aboriginal cultural modes. This is a demographic and social change that is not likely to be reversed.

The development of urban Aboriginal communities brings both serious challenges and tremendous opportunities for Aboriginal people. One of the most significant challenges is the economic well being of Aboriginal people in urban areas: while slightly better off than their counterparts on-Reserve, they lag well behind non-Aboriginal people in labour force participation, income levels, and business development. For too many Aboriginal people, life in urban areas is a life constrained by limited economic opportunities.

But there is also a tremendous opportunity here to mobilize the skills, knowledge, and energies of Aboriginal people and connect them to the economic and labour market opportunities that exist in urban areas.

In order for Aboriginal communities to succeed in building economies in urban areas, they need access to the best available knowledge about what development strategies are effective, what programs make a difference, and how best to develop community capacity. And they also need an effective and supportive policy context that can enable community efforts to bear fruit.

Although there is a significant body of research on success factors in urban Aboriginal economic development and in building capacity in urban Aboriginal organizations, there is currently no national resource or network to share and exchange knowledge in this discipline. This lack of knowledge sharing hinders urban Aboriginal economic growth while at the same time inhibiting the advancement of future research. Government policy also suffers, as policy development is not well connected to the creation of new knowledge or to community activities, and so remains unhelpful or irrelevant to those it is intended to help.

In order to address this, a number of researchers, community leaders, and policy analysts have initiated a project to develop a stronger national network on urban Aboriginal economic development. The project, funded by the Social Sciences and Humanities Research Council and Indian and Northern Affairs Canada, is intended to bring together practitioners, policy experts, researchers, and community leaders in a dialogue about urban Aboriginal economic development.

The intent of the dialogue is enable participants to share their knowledge and experience with each other, so that Aboriginal communities can benefit from current research, and researchers

can more precisely identify what research would be seen as relevant or needed by communities and policy makers. This National Network will involve scholars, practitioners, and others working in urban Aboriginal communities and organizations, universities, federal/provincial/municipal governments, private industry, and non-governmental organizations.

We believe that working together, we can build a strong national network that will enable more effective responses to the urgent economic development needs of urban Aboriginal communities.

Process:

Ottawa National Gathering:

The first step in the creation of this National Network is the two day Gathering in Ottawa, October 28th and 29th. The Gathering is an opportunity for invited participants to begin to define the key issues and activities for the Network, and to give direction to the Steering Committee about Network activities.

We see the Network as a community of learners, a community that can grow to include as many as possible that are engaged in urban Aboriginal communities. We know everyone has valuable insight to contribute and we want to create a climate in which people feel free to make those contributions, and in which those contributions can be shared widely, and can influence practice, policy, and future research.

Learning Circles:

In order for this learning to proceed in an organized fashion, the Network will focus on 'Learning Circles'. Put simply, *Learning Circles* are focused discussions on particular issues, themes, or questions that participants agree are central. They are intended to be small group processes, with an open membership, and a relatively informal structure, a format that reflects traditional forms of dialogue amongst Aboriginal people in North America. *Learning Circles* are the main mechanism for the exchange of knowledge, and the creation of relationships, that lies at the heart of this National Network.

One of the objectives of the Ottawa Workshop is to launch our first *Learning Circle*. As well, we hope that participants at the Workshop will learn the essentials in forming and sustaining *Learning Circles*, and help identify an initial list of issues to be considered in the *Learning Circle*.

The goal of the Network is to establish at least one *Learning Circle* in each of the seven urban areas included in our project. Each *Circle* will include from five to 10 participants, made up of practitioners, academics, and others. *Learning Circles* are not expected to be static. As organizations have changing needs and practitioners changing interests, it is expected that *Circles* will grow, change, find new communities of interest, but continue to be connected. This network of connected *Learning Circles*, creates a collective voice for resources, builds social

capital and supports the ultimate goal of community building. The *Learning Circles* are the key instrument of fostering network capacity and communities of interest.

Stories of Interest

To provide fresh ideas, 'stories of interest' will be compiled and brought to the *Circles*. Rather than a formal case study approach, we favor the simplified format of 'stories of interest'. Stories employ a narrative, which are a traditional tool for framing knowledge. Aboriginal people have used narratives to weave together diverse experiences, to reinterpret previous events, to anticipate future activities, and to impose meaning on unexpected happenings. Stories are interesting to read or listen to, and easy to learn from. Part of the power of this approach is that stories are not held up as a prescription, or a direct comparison emphasizing some groups are doing *better than* others. Nor do the stories conform to *best practices* or '*success stories*.' We learn as much from failure as we do from success. These are important cultural considerations.

There are of course different kinds of stories, just as there are many different strategies for building the economies of urban Aboriginal communities. Some types of stories that we might want to consider include:

Stories Supporting Business Start Up

We need to share knowledge and experience about this critical first step: getting started in the business world. Examples include Aboriginal business support centres assisting entrepreneurs with business start up, and non-profit societies operating social enterprises that employ the difficult to employ. Strategies differ as circumstances vary, and because they reflect the range of options, they become valuable stories for those with similar orientation.

Stories About Building Organizational Capacity

A key theme identified in the current discussions of Aboriginal economic development is organizational capacity to deliver services that support community or business development. Some organizations have skill building, training, and employment readiness as their mission, while others anchor their community development activities in cultural practices:

1. mentoring for leadership development
2. maximizing communications/participation
3. implementing a strategic approach
4. strengthening administrative abilities
5. developing relationships and partnerships

Stories From a Diversity of Regions and Aboriginal Communities Across Canada

Stories reflecting the cultural and geographical diversity of the country will be gathered. We would attempt to include stories from each of the regions of the country, and stories that reflected the experiences of First Nations, Métis, and Inuit.

The issues we think are important

We invite you to edit, contribute to or critique these questions. Each *Learning Circle* will be autonomous in deciding which questions they wish to pursue. We use this approach of listing questions to help to introduce the many facets of urban Aboriginal community economic development.

Some questions from academics

1. What are the limits to trying to identify success factors in economic or business development?
2. If Aboriginal communities or government funders wanted to move to an evidence-based approach, how should that be accomplished? What are the key indicators, and what tools are available to measure these?
3. What is the impact of economic development activities on community development, and vice versa?
4. What is the impact of specific government policies on economic development in urban Aboriginal communities?
5. What role does social capital play in supporting Aboriginal entrepreneurs? Is that social capital drawn from the Aboriginal community or the broader community, and does it matter what the source is? Are there different kinds of social capital involved?
6. In what way do activities associated with economic development reflect Aboriginal cultural practices, or norms and relationships that are unique to Aboriginal peoples?
7. Do people use their connections to their traditional territories or home communities to support their economic or business activities? Do land based communities draw on the capacities of their urban members?
8. What role do Aboriginal organizations play in the activities or aspirations of Aboriginal entrepreneurs, or community developers?

Some questions from practitioners

1. What can you accomplish with existing resources?
2. What are the institutions that support you in your work? These may include: Aboriginal Capital Corporations, business support centres, government agencies, urban councils, reserve-based resources. What is missing here and how can we improve the supports already offered?
3. What are the cultural practices you have built into your work place that 'fit' with traditional Aboriginal practices?
4. Are there specific human resource practices and procedures that have supported your work?
5. What are the creative ways you have been able to combine program dollars to fund a needed program?
6. How could others make use of this strategy of creative combinations of program dollars? How can they prepare and apply for these funds and who can they talk to?
7. How could funders work together to make these program dollars more effective and available to organizations?

8. What successful, working alliances already exist? How can new alliances and relationships between Aboriginal organizations be a source of information, resources, support, and collaboration?
9. Have you found ways to exercise sovereignty: become more independent, make your own decisions, less dependent on government money, and access to non-government resources?
10. What are the urban Aboriginal development models that others may employ?
11. What policy changes would make a difference?

We invite your feedback, and look forward to your participation in the Workshop, the *Learning Circles*, and the other Network Activities.

Agenda

Agenda at a Glance

Time	Room	Session	Facilitator
October 28th			
8 – 8.30 am	Confederation	Breakfast	
8.30 am	Champlain	Introductions & Project Overview	Greg Halseth, Cheryl Matthew & Ray Gerow
10.30 am	Champlain	Break	
Mid-morning	Champlain	Continue Project Overview	Chris Corrigan
12 – 1 pm	Confederation	Lunch	
Afternoon	Champlain	Collective Overview	Chris Corrigan
2.30 pm	Champlain	Break	
Afternoon	Champlain	Continue Overview - Introduction on Need	Charles Horn & Cheryl Matthew
4.30 pm	Champlain	Close	
October 29th			
8 – 8.30 am	Confederation	Breakfast	
Morning	Champlain	Learning Circles & Regional Structures	John McBride & Chris Corrigan
10.30 am	Champlain	Break	
Mid-morning	Champlain	Regional Group Session	Chris Corrigan
12 – 1 pm	Confederation	Lunch	
Afternoon	Champlain	Open Space – Getting It Out of the Room	Chris Corrigan
2.30 pm	Champlain	Break	
Afternoon	Champlain	Continue Open Space	Chris Corrigan
4.30 pm	Champlain	Closing Circle	Chris Corrigan

Detailed Agenda**October 28th**

8.00 am	Breakfast - Confederation Room
8.30 am	Introductions and Project Overview – Champlain Room Using a circle process we will:
10.30 am Break	<ul style="list-style-type: none"> • Develop a roster of names (perhaps create a map), • Come to a collective understanding of who is in the room; and • Come to a collective understanding about what the project is about.
12.00 pm	Lunch – Confederation Room
Afternoon	Collective Overview – Champlain Room Using the World Café process we will create a document with an overview of the major themes and common grounds in practice, policy and theory.
2.30 pm Afternoon	Break – Champlain Room Afternoon session ends at 4.30 pm.

October 29th

8.00 am	Breakfast - Confederation Room
8.30 am	Learning Circles and Regional Structures – Champlain Room We will learn about Learning Circle methods and “chaordic design”. Each regional group can bring back its documentation on where it will go from here.
10.30 am	Coffee Break – Champlain Room
Mid -morning	Regional Group Session – Champlain Room Regional groups break out for an hour to begin to crack “chaordic design”.
12.00 pm	Lunch – Confederation Room
Afternoon	Getting It Out of the Room, Initiating Work – Champlain Room Using the Open Space process we will create a list of action items and a to-do list for the network as a whole, as well as engage in dialogue for cross region issues.
2.30 pm	Coffee Break – Champlain Room
Afternoon	Closing Circle – Champlain Room Afternoon session ends at 4.30 pm.

Profiles

Network Co-Directors

Greg Halseth



Greg Halseth is a Professor in the Geography Program at the University of Northern British Columbia, where he is also the Canada Research Chair in Rural and Small Town Studies and the Acting Director of UNBC's Community Development Institute. His research examines rural and small town community development, and community strategies for coping with social and economic change, all with a focus upon Northern BC.

Ray Gerow



Ray has an extensive background in economic development, both as an entrepreneur and as a business development service provider. He has run and/or managed numerous small businesses during his career, including a roofing business, chimney sweep, towing company, first aid, arts and crafts store and a specialty cake business, to name but a few.

Ray was with the Canadian Armed Forces for six years, at which time he was honoured to be part of the Canadian contingent in Doha, Qatar during the Gulf war. His work history includes six years in the military, six years in a sawmill, eight years as a part-time ambulance paramedic, fire boss with the BC Forest Service, manager of a Woolworths department store, construction and logging. For the past 15 years Ray has worked in the field of economic development, most recently as President/ CEO of the Aboriginal Business Development Centre in Prince George.

Ray is very active in his local community, as well as with many provincial and federal boards or advisory groups. He is Vice-Chair of the Board of Governors for the College of New Caledonia, sits on the Board of Directors for the Northern Sports Centre at the University of Northern BC, as well as the Board of Directors for the Nechako Kitimaat Development Fund. He is former Chair for the Aboriginal Business Services Network Society of BC, is a founding board member and past Treasurer of the Log Building Industry Association of BC and is a former Chairman of the Native Economic Development Advisory Board for the province of BC. Until recently he was also the Chair for the Counsel for BC Aboriginal Economic Development for Indian Affairs.

Steering Committee

John McBride



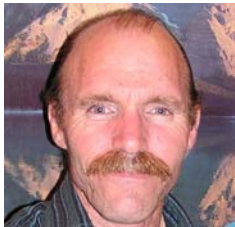
John McBride is an experienced community organizer and social enterprise business person. He has been studying, consulting, writing and teaching in the areas of Aboriginal community and organizational development for over 17 years. His major research has centered on how to create a climate of support for Aboriginal entrepreneurs. He has published his findings under the title, "Minding Our Own Businesses: how to create support in First Nations communities for Aboriginal business."

His other recent publications are, "Our Own Vision: Our Own Plan", 6 case studies of Aboriginal economic development in B.C., and "Rebuilding First Nations: the tools, traditions and relationships," a record of a conference on First Nations governance and accountability.

More recently John has researched and written about regional service delivery, housing governance, child and family services, and Aboriginal educational strategies and tools.

He recently designed and tested an Aboriginal organizational assessment tool, and conducted a series of Learning Circles for Aboriginal non-profit organizations.

Charles Horn



Charles Horn received his BA from Simon Fraser University, and his MA in Political Theory from the University of Victoria, where he is currently a doctoral candidate in Political Science. His research interests focus on governance issues, particularly in urban and Aboriginal communities, homelessness, British Columbia electoral politics, and the analysis of professional writing. Charles also maintains a personal and research interest in the politics of Zimbabwe (where he is from).

Charles worked as a negotiator and policy analyst for the British Columbia government for 15 years, doing self-government, treaty, and child welfare negotiations. He currently has a consulting business. Current and recent projects include co-managing an oilfield and forestry services business; providing program and organizational development to non-profits, and producing and editing technical documentation.

Steering Committee

Cheryl Matthew

Cheryl is from the Simpcw First Nation in British Columbia, Canada. She is a Senior Policy Analyst with the federal government. Previously, she was the founder and Executive Director of the Centre for Native Policy and Research in Vancouver, BC. She also started a consulting company in 1999 for Aboriginal research, policy analysis, facilitation and project management.

She has a BA, in Anthropology and Sociology from Simon Fraser University; an MA in Leadership and Training from Royal Roads University; and will start PhD studies in September 2009. She has volunteered with many Aboriginal and non-Aboriginal organizations over the years.

Ian Peach

Currently seconded to the Office of the Federal Interlocutor for Métis and Non-Status Indians as a Special Advisor, Ian Peach has been with the Government of Saskatchewan for thirteen years. Prior to coming to Ottawa, he was the Director of the Saskatchewan Institute of Public Policy, where he had previously been the 2003-04 Government of Saskatchewan Senior Policy Fellow and, later, the Research Director.

Prior to his secondment to the Institute, he was Director of Constitutional Relations in the Department of Intergovernmental and Aboriginal Affairs and, for five and one-half years, a Senior Policy Advisor in the Cabinet Planning Unit of Executive Council.

In his nearly 20 years of public service, Mr. Peach has been involved numerous intergovernmental negotiations, including the Charlottetown Accord, the Calgary Declaration, the Social Union Framework Agreement, First Nation self-government agreements, and the Canada-Saskatchewan Northern Development Accord. He has also been involved in developing Saskatchewan's policies on a broad range of issues, including Saskatchewan's argument before the Supreme Court of Canada in the Quebec Secession Reference and key cross-government strategies to address the socio-economic disparity of Aboriginal people in Saskatchewan and northern economic development. Born in Halifax, N.S., Mr. Peach holds a Bachelor of Arts from Dalhousie University and a Bachelor of Laws from Queen's University. He has recently begun a Master of Laws program at Queen's.

Patrick Boucher

Patrick works for the Office of the Federal Interlocutor at INAC.

Facilitators

Chris Corrigan



Chris is a process artist, a facilitator of social technologies for face to face conversation in the service of emergence. His business is supporting invitation: the invitation to collaborate, to organize, to find one another and make a difference in our communities, organizations and lives.

David Stevenson



David Stevenson is Métis /Cree and Irish ancestry and was raised in Calgary Alberta. He now lives on Vancouver Island and is the CEO of the *Vancouver Island Aboriginal Transition Team* working on the development of an Aboriginal child and family services system for First Nations and urban communities.

Information Package

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Getting to Know Each Other

The participants were asked four questions:

1. What is your particular interest in urban Aboriginal economic development?
2. What are you curious about regarding this project?
3. What assets, gifts or capacities can you offer to this work?
4. This is a three year project. What do you hope will come from it if we work well?

These are the responses.

1. What is your particular interest in urban Aboriginal Economic Development?

My interest is in Indigenous economic development and women and youth; identifying new strategies for capacity building.

Right now we are trying to put together an economic development strategy. Also I am interested in social enterprise within non for profit sector in particular within the Aboriginal community.

I would like to see progress/advancement in this area in all urban areas not just the large centres.

My interest is with Aboriginal people getting into the mainstream commercial projects and ventures and with Peace Hills Trust Company branch located on an Urban reserve in the City of Saskatoon. I have seen the challenges that Aboriginal businesses face, in regards to financing and proposals. If we can assist, by way of developing some type of outline that would help Aboriginal business and individuals to obtain or have a better chance at obtain financing. I am a member of a First Nation that has recently ratified its Treaty land Entitlement, which enables the band to purchase additional land base, this is my interest, is to get the band to purchase land near big centers in order to be self-reliant and establish its own revenues sources and not rely on Government handouts.

My interest in urban economic development is related to my work here in the North End of Winnipeg. Winnipeg has a relatively high (compared to other major Canadian cities) Aboriginal population (10%). The rate in the inner city particularly the North End is much higher at around 20%. In 2002 I started a community based construction company in the North End employing primarily low income inner city residents many of whom had been unemployed, on social assistance or recently released from prison. Since then we have averaged approximately 20 employees on full time basis. The majority of our employees are Aboriginal. The goal is to offer employees opportunity to learn a trade and earn a decent income while participating in the renewal of housing and infrastructure in the inner city. Before embarking on my current work in community economic development and social enterprises, I was policy advisor to Bud Wildman, Minister for Native Affairs and Natural Resources in the Ontario NDP government in the early

90's. The minister was committed to Aboriginal self-government and allocation of resources for Aboriginal self-government.

I am interested in the use of community economic development and social economy/social enterprise models by urban Aboriginal community organizations. I am also interested in the importance of community-based and participatory research practices and partnerships to generate urban Aboriginal leadership in economic development

My interest in urban Aboriginal economic development is based on my professional experience in working with and for First Nation clients, Aboriginal organizations and government in designing and developing economic development initiatives. Over the past ten years, there have been a number of government departments and both the private and public sectors that have produced many reports and documents on economic development. We are all aware of the challenges and barriers Aboriginal individuals, businesses and communities face in the mainstream economy. I would like to contribute as a meaningful participant in the process and hope my opinions; suggestions and ideas are taken into consideration. One final interest is that I believe there needs to be support for individuals and communities and institutional capacity building inclusive of education, training and workforce experience that are suited to the diverse cultural, social, regional and national needs.

It would be great if the governments could provide specific funding for this endeavour(s). Aboriginal funding for economic development has always been directed for on-Reserve projects. Incentives like tax exemption or phased-in taxable solutions would be interesting.

IRS interest's are to ensure the Urban Inuit are including in the discussion, planning and implementation of any Urban Aboriginal Economic Development initiatives, programs and services, interests include research, data collection, data analysis, networking and connecting Urban Inuit organizations and individuals to Aboriginal Economic Development people, governments and industry.

While the Métis fair better than other First Nations peoples in Canada's cities, the socioeconomic outcomes are still worse than the rest of the population. The MNC is interested in improving these outcomes and achieving new opportunities for Métis ownership and investment in community economic development initiatives.

I am interested in business development opportunities for the growing number of Aboriginal people that are moving to urban centres.

I am Urban for all intents and purposes, and recognize that there is a migration and even duality for some of our First Nation population as they leave for employment and other reasons. It is probably one of the fastest growing areas of business in Canada as First Nations realizing opportunities in Urban Canada. Some of our First Nations are also urban.

Our organization is currently in the process of creating an Urban Aboriginal social enterprise business and I am particularly interested in what other groups in Canada or the province are doing to create urban Aboriginal businesses. As well, Vancouver has recently become engaged in the creation of the Metro Vancouver Aboriginal Executive Council. I would like to see if this has the opportunity to create or expand the economic development for the metro Vancouver area.

Inuit Tapiriit Kanatami's (ITK) in urban Aboriginal economic development is how it will tie in with the new development of the Governments framework on economic development. What are the opportunities, threats, strengths and weakness already in urban centres around economic development? Where are the gaps?

I am interested in looking at the opportunities economic development may provide to help support/enable self-governance for urban Aboriginal people. Identifying the range of stakeholders who are interested in using economic development to enhance the capacity bldg in Aboriginal organizations, so that economic development actually builds urban Aboriginal social capital.

2. What are you curious about regarding this project?

I am curious about the role of network participants and the nature of research they can participate in

I am curious about what is happening in economic development for Aboriginal people, some best practices, and how to set up social enterprises in the Aboriginal community.

I would like to see what results come out of it, and the Learning Circles.

I'm curious about what other participants have to say and to get ideas to assist my First Nation.

I am curious on how the research resulting from this project will be implemented in various urban areas across Canada.

I am curious about research questions to be addressed and their potential linkage to research being done in other community university research partnerships. I'm interested in the knowledge mobilization activities that can be supported and potential policy implications linked to policy research in other CED networks and projects.

I am interested in hearing the different perspectives from the participants on their viewpoints and opinions of how effective learning circles would be and how to better build upon the partnerships between government, academia and communities. I am also interested in learning how the academic participants can contribute to community learning and practice when it comes to urban economic development initiatives.

I would like to understand the issues raised and possible solutions suggested.

IRS is curious to know what research, data analysis, number of programs, services that Urban Inuit can apply to and be involved in. What are the various Economic Development policies for Aboriginals (Urban), how these policies are developed, by whom and are they inclusive to urban Inuit, if not why and how do we enhance, change or develop policies for Urban Inuit.

There are many things. First, I would like to see how the Métis can access new projects and funding, build new partnerships and collaborate with business and industry.

I am interested in the process and the end result.

I am curious to hopefully learn more stats on what is going on and also have a more rounded view from all the participants. I hopefully can share my optimism about the good things that I see going on.

I am curious as to what everybody else doing in regards to Urban Aboriginal economic development. I would like to know the how, what, where, when and why of creating successful Aboriginal economic development.

ITK is interested in finding out more about this National Network for Urban Aboriginal Economic Development, what is the mandate, purpose, goals and outcomes of this network. Who will the network be made up of?

I would like to see if this research can identify something other than the 'standard' economic development subject linkage areas (services, procurement, resource development etc) Can this work identify any economic development subject areas that are unique to an urban Aboriginal context?

3. What assets, gifts or capacities can you offer to this work?

I have twenty-five years of academic and practical experiences in Indigenous economic development through research, teaching and publications. I have experience with community-based social and economic planning and project development from many indigenous perspectives. I have experience with community-based adult learning, research and training. I've worked with women and development issues for other international perspectives.

I have worked in the Aboriginal not for profit area for over thirty years and have been involved in the skill development side of economic development by providing education and training for Aboriginal people. I am open to new ideas and want to learn as well as share.

Being a First Nation person that has direct experience living in a remote isolated reserve and transitioned to a non-Aboriginal urban environment. My determination in advancing Aboriginal peoples' interests. Educating the non-Aboriginal population about Aboriginals.

Having worked with Peace Hills Trust Company for the past thirteen years, I have worked with Aboriginal groups in Saskatchewan and British Columbia. They have financed projects and seen projects that have been successful in an urban mainstream environment.

Asset that I bring to this project are my years of experience in CED and Social Enterprises and actually having managed a social enterprise for the past six years. In addition I have experienced corporate management, government (both as a federal bureaucrat and provincial political advisor), and academia having taught management courses at Ryerson University in Toronto. I have traveled to more than 50 countries and have worked overseas both in Europe and in Central America.

An asset that I bring is potential linkages to other community university research partners involved in relevant work. Support for knowledge mobilization from the research. Linkages to members of the Canadian CED Network from urban Aboriginal backgrounds. Knowledge of Aboriginal and non Aboriginal CED activities, models and policies in Canada and internationally. Knowledge and involvement in CED policy development from national social economy research program that may be relevant. Connection to national and global networks of community based researchers

I am completing my PHD in Business and have twenty years experience working in the economic and business development field. I have developed effective working partnerships with government; industry and First Nations in moving economic development initiatives forward both on a small and large scale. I am an experienced facilitator, work well in a team environment and am respectful of our diverse groups.

I have worked both on and off- Reserve and see the challenges that Aboriginal people face in both contexts when trying to start a business.

Assets that I bring are the knowledge of the urban Inuit communities, the players, networks and connections, access to Federal programs and services, funding sources, policies (or lack of) for urban Inuit. Gifts that I bring are knowledge, people, and the gift of giving (in the sense of providing advice, information on and to Urban Inuit about Economic Development research and development). Capacity - Through HR means, the capacity to facilitate, coordinate Urban Inuit partners initiate and lead the discussion.

The MNC governing members have many resources and successes in economic development projects. We would like to build on these successes, find ways to increase capital and capacity building and expand projects in new areas and share what we can to assist others. In my role as director of intergovernmental affairs, I offer a background in political economy and would like to expand areas of investment and open up new opportunities for community development. I also have done work in evaluation and feel strongly that measuring change is just as important as achieving it. Finally, I have lots of ideas, think strategically and consider short, medium and long term outcomes when it comes to economic development.

I have knowledge of Aboriginal people, developmental lending and conventional lending

I get to travel quite extensively around the country to participate in many Urban Economic events and businesses. This allows me to have an awareness that I believe is exposed and enlightened to this particular topic

I am involved in the leadership within Vancouver and our organization has currently created an urban economic development plan to increase our goal of self sufficiency. Please find attached my resume and bio that outlines my work experience

ITK is the national organization representing the four land claim organizations. Our assets would encompass a wide range of knowledge, experience and understanding.

Navigation links to provincial ministry interests and associated resource links. Understanding of self-governance context for urban Aboriginals (non-Status and Métis) who are the stakeholders.

4. This is a three year project. What do you hope will come from it if we work well?

I hope that we will be able to highlight most of the issues affecting indigenous research and training. We will build a strong network of expertise focusing on indigenous research and policy directions. We will be able to develop tools and products to enhance academic learning.

I hope to be more knowledgeable about economic development, have made some good contacts and seen some best practices. Hopefully we will get some good ideas, examples, advice and inspiration to help us with our economic development strategy.

I would like useful tools and increased awareness about Aboriginal issues.

I hope that we can get lots of ideas that Aboriginal business and individual can use.

My hope is that we can deliver practical solutions for local implementation that will further Urban Aboriginal Economic Development across cities in Canada.

I would like to see a connected, informed network of practitioners, researchers and policy-influencers developing effective Aboriginal community economic development activities and leadership in urban areas of Canada, supported by appropriate resources and policies from all levels of government.

My hope is that rather than duplicating efforts that have been done in the past there needs to be a multi national forum where government, academia, on and reserve First Nation people, Aboriginal peoples (Métis and Inuit) can share and offer practical and realistic solutions for urban Aboriginal Economic Development. Aboriginal people have unique situations from province to province particularly as it relates to progress on resources, land claims, and other

economic initiatives. My hope is that building understanding, maximizing economic potential for urban initiatives, human and financial support and access to capital are carefully examined and all stakeholders can achieve solutions to these challenges through open and honest dialogue.

My expectation is that after the three years, a solid empirical and anecdotal evidentiary base is collected in order to address the specific challenges faced by aboriginal entrepreneurs (e.g. Intellectual and cultural property issues, statutes and practices which inhibit economic development surmounted etc..).

IRS hopes that this project will lead to further research on urban Aboriginal Economic Development for urban Inuit, enhanced or new Economic Development policies, programs and services to which Urban Inuit can take advantage of. Most importantly, the Urban Inuit voice is heard and acted upon.

The most important outcome would be creating capacity for change. Three years is not a long time to make great strides, so it is important to build confidence, generate leadership and start opening doors for long term sustainability.

I would like to see a perpetual network of business development practitioners spanning the Country. A relevant data base established to assist them in their day to day activities. The establishment of virtual business development teams to develop larger proposals.

I hope that the information is shared with the government as an area of real value to be supported. I personally would like to advocate the transition of social assistance funding and child care funding to economic development funding, both on and off- Reserve. All levels of government need to address that issue to have further success with social issues. We are leaving some people behind because we leave them on social assistance and take care of their kids in a less than productive manner.

I would like to see a plan(s) for the improvement and growth of Aboriginal businesses across Canada.

We would like to ensure that there is Inuit involvement in the process and that the outcomes are inclusive of all three Aboriginal groups in Canada

I would like to see lasting relationships, improved understandings at in an internal and external context.

Key Research Issues on Urban Aboriginal Economic Development

Introduction

For many generations, Aboriginal peopleⁱ have lived in urban areas.ⁱⁱ Prior to colonization, at different times and in different places, First Nations across North America created dense settlements which acted as trade centres, places of residence, and gathering places for important events. With populations numbering in the thousands, these were important cultural, economic, and social centres for First Nations.

Aboriginal people still live in urban areas, but urban life today is dramatically different. Surrounded by non-Aboriginal people and often separated from their cultural practices and their territories, Aboriginal people in urban areas face serious challenges in maintaining their identity, building their communities, and developing their economies.

Increasingly, the face of the Aboriginal community in Canada today is an urban one. According to the 2006 Census, over 60% of First Nations people now live off-reserve, and this trend is expected to continue. But this dramatic demographic shift has not been accompanied by an economic shift: in general Aboriginal people living in urban areas continue to be marginalized from the larger economy. While urban Aboriginal people are socio-economically slightly better off than their on-Reserve counterparts, they remain significantly behind the non-Aboriginal population.

In response to the need to support the economic development of urban Aboriginal communities, a group of scholars, practitioners, and others have come together and initiated a project to both increase our understanding of the factors that lead to successful economic and business development in urban Aboriginal communities, and to disseminate that knowledge between academics, policy analysts, and community practitioners. Funded by the Social Sciences and Humanities Research Council and the Office of the Federal Interlocutor for Métis and Non-Status Indians, the project is aimed at establishing a network of scholars and practitioners who, together, can deepen the dialogue about urban Aboriginal economic development, and find ways to use current and future knowledge to support urban Aboriginal communities in their goals and aspirations. The intent is to create a strong policy, program, and knowledge utilization context to support the work of urban Aboriginal communities.

This *Research Issues Paper* is intended to guide discussions in the first stage of the Network, by identifying an initial set of issues which arise from the academic literature on urban Aboriginal communities. The *Paper* is organized around a series of *contexts* that confront those as they work to develop their economies, participate in the wage economy, and develop a business sector. These include:

- the socio-demographic context
- the jurisdictional context
- the policy context
- the institutional context, and

- the program context.

For each section, an attempt is made to set out the key *strategic* questions or issues facing communities, and the key *research* questions that are generated by our current state of knowledge about urban Aboriginal communities.

As this Paper is not written as a literature review, the references are limited, with the expectation that as the Network develops more intensive descriptions of the existing literature will be created for the various topics adopted by participants.

DISCUSSION: CONTEXTS FOR URBAN ABORIGINAL ECONOMIC DEVELOPMENT

Socio-Demographic Context

One of the motivations behind creating a National Network on urban Aboriginal economic development was the need to ensure that policy, practice, and research kept pace with the changing demographics of Aboriginal peoples, in particular the rapid increase in the urban population. This attentiveness to demographic realities, it turns out, is shared by the literature: as an organizing scheme it has deeply shaped the analyses of urban Aboriginal communities.ⁱⁱⁱ The assumed centrality of socio-demographics factors has led researchers to develop a wide body of knowledge about the characteristics of the urban Aboriginal population. While that body of work is limited by the available data-sets (typically Statistics Canada data and vital statistics collected by Provinces), a significant effort has been made to mine that data for insights into the situation of urban Aboriginal people and communities. As a result, detailed and thoughtful analyses of important dimensions of urban Aboriginal life are now available: residency patterns, income levels, movement between urban and home communities, class composition, age and gender distribution, population growth over time, employment patterns, and changes in Aboriginal identification over time and across locations.^{iv}

The analysis is welcome and is of considerable value in understanding urban Aboriginal communities and in designing policies and programs that reflect the unique situations of Aboriginal people.

The focus on socio-demographic data, however, has sometimes meant the analysis of urban communities has remained at the descriptive level, with insufficient attention paid to the role of that information in designing program interventions, or in assessing how socio-demographic data can inform the activities of Aboriginal organizations. As well, placing socio-demographic data at the core of our understanding of Aboriginal communities has meant that other issues, such as urban Aboriginal political development, identity^v, or the nature of community interactions^{vi}, have tended to take a backseat in the Canadian literature to generalized descriptions of population characteristics. From a research perspective, this socio-demographic focus has also been at the expense of a clear linkage to broader issues such as the political economy of urban areas or the role of statistics in the 'governmentalization' of Aboriginal communities. More crucially, from the perspective of Aboriginal research methodologies such a focus does not encourage us to turn to Aboriginal ontologies, epistemologies, and research

paradigms that would suggest more holistic and integrated ways of understanding urban Aboriginal communities.^{vii} Finally, from a practical perspective, socio-demographic approaches draw attention to the gaps between Aboriginal people and the larger society, but they are less able to indicate the ways that Aboriginal people, as active agents, can find creative ways to respond to that marginalization, and in this sense are not always a helpful resource for community organizations who turn to academic work for strategic guidance.

A potential line of activity for the Network, then, is to more clearly identify what data actually matters to program managers, community organizations, or policy makers, on the one hand, and on the other, to draw a tighter connection between the characteristics of the community and the impact these have on the economic and business activities of community members and Aboriginal organizations. The goal will be to add a strategic dimension to a discussion that is often focused on empirical issues.

As well, work is needed on ‘thicker’ descriptions of the characteristics of the urban Aboriginal community; that is, descriptions that go beyond demographic features, and give us a deeper sense of the intricate and complex relations that Aboriginal people in urban areas have to the economy, other community members, and to governments. There are a number of ethnographic studies of urban Aboriginal communities^{viii}, but these do not explicitly link their findings to strategy and policy questions relevant to urban Aboriginal economic development. This is a gap in the literature that the Network can perhaps begin to address.

The Jurisdictional Context

One of the key contexts to be considered in urban Aboriginal communities is that of jurisdiction. If you include municipalities, responsibility for decision making and service provision is divided between five levels of government:

- 1) First Nations across Canada have long asserted their right to exercise jurisdiction over community members wherever they may live^{ix}
- 2) Many Métis are represented politically, and receive services from, governance structures associated with the Métis National Council
- 3) The federal government in turn asserts that it has jurisdiction in its fields of competence, but that its responsibility for Status Indians under 91(24) essentially ends at reserve boundaries
- 4) Particularly for health and social issues, provinces also assume responsibility for decisions that impact on economic development in urban Aboriginal communities
- 5) Finally, municipal governments have often stepped into the picture to provide services or to engage Aboriginal people in urban initiatives.

This jurisdictional context is problematic, in particular because it leads to an unclear policy framework, confuses lines of accountability and responsibility, and results in inadequate or inappropriate program responses^x. It is also burdensome for Aboriginal people: as is well known, the hard work of connecting and coordinating the different governance levels typically rests on the shoulders of the community.

But we also know that this jurisdictional complexity is not necessarily a barrier to successful economic development. We know that, despite contested and unclear jurisdictional boundaries, some communities have made significant advances in their ability to participate in the economy and establish viable Aboriginal businesses^{xi}. So it would be important to clarify the specific conditions under which this jurisdictional complexity inhibits development, and to examine the strategies used in different places to reduce or eliminate the impact of the multiple claims to jurisdiction on economic or business development.

This question of jurisdiction goes beyond the issue – common to discussions of creating a ‘positive investment climate’ – of ensuring certainty and clarity for potential investors. For Aboriginal communities, the question of jurisdiction is a political question as much as it is a business issue, in that it is closely tied to debates about the legal and political status of urban Aboriginal communities. One way in which First Nations with a land base have been able to develop their economies is through the (limited) leverage over industry and government they possess by virtue of a legal right to be consulted and the potential existence of Aboriginal title. In some cases, benefits agreements and employment opportunities have flowed from that position. But most of the legal arguments for the duty to consult and for Aboriginal title are derived from the fact of continued First Nations occupation of (or historic control over) their traditional territory.^{xii} As a result, there are few legal or conceptual resources available to make the case for a distinct form of jurisdiction attached to an urban Aboriginal community.^{xiii} However, we also know that the Courts have not been silent on this issue; both in *Corbeire* and in *Misquadis*, the Courts in Canada have extended legal recognition to urban members of First Nations, and to urban Aboriginal communities in general.

Strategically, the issue is the degree to which some form of control, even when that control falls short of jurisdiction, supports or enables economic or business development initiatives. While Aboriginal control over policy and programs is a clear normative goal of most urban organizations, it is not always so easily achieved, and so one line of inquiry for the Network is to understand how best to plan and implement initiatives in an environment in which Aboriginal control is uneven, limited, or absent.

From a research perspective, then, there are substantial issues that remain unaddressed. In particular, work is needed on the conceptual bases which could underpin urban Aboriginal community control (to supplement existing discussions of the potential forms or models) and on the exact relationship between enhanced Aboriginal control and success in economic and business development.^{xiv}

The Institutional Context

Probably the single most influential research for Aboriginal people and economic development is the work produced by the *Harvard Project on American Indian Economic Development*. At its core, the many projects that have come out of the Harvard Project share a central insight: institutions matter. While there is some question about exactly *how* they matter, and what the impact is of well formed governing institutions, this general line of analysis emphasizes the

decisive role of governance in economic development for American Indian Tribes^{xv}. This general approach has found currency in a Canadian context^{xvi} as a number of First Nations organizations, such as the British Columbia Assembly of First Nations, have made efforts to incorporate this approach in their economic development strategies.

But of course this work has been done in the context of land-based communities. The institutional and legal context in urban communities is hugely different. There are, for instance, very few of the governing institutions that resemble those described in the findings of the Harvard Project. The majority of urban Aboriginal organizations are service providers, focused on social, health, or advocacy services: they do not set the ground rules for commercial transactions or allocate property rights. The aspirations of urban communities have found expression, though, in relatively durable political organizations, and a good deal of community life revolves around the activities or the roles of service organizations, so analyses of the role and impact of urban Aboriginal organizations still seems a fruitful path. A potential site of inquiry for the Network, then, is to try to understand the role of political bodies in supporting or facilitating economic development, and the role of Aboriginal service providers in supporting the economic activities of community members.

As well, the institutional landscape is considerably more complex in many urban settings: there are both a multitude of Aboriginal providers in some settings with no overarching governing body, and there are alternative non-Aboriginal organizations that offer services not available to even the largest reserve community. In addition, non-Aboriginal governments can (and do) claim to provide the framework for investor confidence and procedural fairness central to the prescriptions of the Harvard Project. Urban Aboriginal institutions thus face the double difficulty of both establishing themselves and displacing other, more powerful institutions.

This raises the question of the role of institutions in urban Aboriginal economic development. While there have been a number of attempts to describe the institutional environment^{xvii} little work has been done in Canada on the specific ways in which the organizational context impacts community dynamics as these effect economic development^{xviii}. From a strategic perspective, it would be productive to have more analysis about what kinds of institutional arrangements facilitate or inhibit economic development in urban areas. Given the dominance of non-Aboriginal institutions and their near monopoly on contract enforcement and legal decision making, in what sense do institutions matter for urban Aboriginal people interested in developing their economy? Is it an issue of procedural fairness and governance, or more an issue of building social capital or establishing community networks that can support early stage entrepreneurs^{xix}? Or is it the *content* of the technical assistance provided by Aboriginal service providers to community members that constitutes the value-added of urban Aboriginal organizations?

From the perspective of a research agenda, then, there is a need to deepen the research on urban Aboriginal organizations beyond a description of their formal features, and to try understand the role they play in community life, in mediating the relationship between

community members and non-Aboriginal governments, and in protecting Aboriginal identity from being absorbed into the assimilative thrust of market based social relations.^{xx}

The Policy Context

All levels of government have developed policies with respect to urban Aboriginal people^{xxi} but the evidence suggests that most governments do a poor job of this: they approach urban Aboriginal policy with various combinations of hesitation, lack of knowledge, blind hope, and indifference. Thus, it is not the complete *absence* of policy that is the issue; it is rather the *character* of those policies that is problematic. First, in part because of the jurisdictional complexity, those policies are not well coordinated. Second, they tend to be fragmented, with important issues left unaddressed. Third, where policies for urban Aboriginal communities do exist, they are often built upon assumptions drawn from land-based communities, and fail to address the social and economic realities of urban communities. Or, alternatively, they are derived from urban policy in general and so miss the unique dynamics of Aboriginal communities. Current policies do not, in other words, express a clear and coherent vision of economic development for Aboriginal people in urban areas.

The inadequacy of the current policy context seems easy enough to demonstrate. However, a number of key questions remain. While we can see the value of a strong policy context, we need more discussion about the concrete ways that existing policies enable or constrain the activities of community leaders and entrepreneurs to develop an urban Aboriginal economy. As well, there are questions about the policy framework for urban Aboriginal communities. What kinds of recognition or support or affirmation are appropriate? Are existing mechanisms for involving urban Aboriginal people in policy adequate, and - given the diversity of urban Aboriginal communities - how would an inclusive policy process be organized.^{xxii}

Strategically, what kinds of policy analysis and research are needed to enable urban organizations to meet their goals and serve their members? And, given that it is unlikely that the sources of policy weakness in this sector will disappear in the short term, what practices enable communities and entrepreneurs to minimize or avoid the limitations in the current policy environment? Put another way, are gaps in policy potential sites of creative development and experimentation?

In the service of both strategy and research, and with the goal of policy change, we could also benefit from a better understanding of the process inside government through which policy is generated and implemented. This is true overall for Aboriginal issues, but the relatively undeveloped nature of the urban Aboriginal policy community means that the problem is deeper and more in need of scrutiny. It also means that the opportunities are greater, as there is less policy inertia to overcome in pursuit of change. This calls for both more studies of the dynamics of change in this urban Aboriginal policy, and more detailed studies of particular policy areas.

The Program Context

From the perspective of Aboriginal organizations in urban areas, the most important feature of daily life is programmatic: the core business that allows most urban groups to survive is service delivery. Unlike land based communities, urban organizations rarely have core funding, or any other source of long term financial stability. To survive, and be able to meet community needs, urban Aboriginal organizations need to attach themselves to program streams. In urban Aboriginal communities, programs matter: program delivery is a defining feature of organizational and community life, both because services are needed, but also because programs and the organizations that deliver them offer a point of strategic intervention for larger community aspirations, and a mechanism for collective action. For community members, involvement in service delivery organizations is often an important mechanism for entry into larger community dynamics, in addition to providing much needed personal development and assistance.

This program landscape has been surveyed at different times and places in an attempt to get a better understanding of the range, scope, and impact of programs for people in urban Aboriginal communities.^{xxiii} Programs, though, are not static, so exercises in program mapping in and of themselves tend to have a limited lifespan, notwithstanding the important insights they can generate about economic development. From the perspective of funders and community members, what is important is the long standing question of program effectiveness (including value for money), and the related issue of how to ensure that programs are delivered - and preferably managed - by Aboriginal organizations.

This points us towards some areas of focus for the Network. First, what is the actual impact of the various programs targeted to economic, business and labour force development? What works and what doesn't? What determines if a given program is successful in supporting economic development? Second, what are the strategies used by Aboriginal organizations to ensure that programs reflect the cultural and social norms of community members, and what is the impact of having programs delivered and managed by urban Aboriginal organizations? Using the language of the Harvard Project, what kinds of technical assistance matter, and what kinds don't?

Third, from the perspective of Aboriginal communities, programs can only be effective if they adopt a holistic perspective that treats community members, not as clients with a specific deficit, but as whole human beings, where all dimensions of that person's life are addressed. Given this, how should we understand the interaction *between* programs, and what practices allow us to ensure that community members are not transformed, through the service delivery system, into clients of the administrative state?

From a research perspective, there are significant issues associated with the dominance of a service delivery perspective in discussions of urban Aboriginal communities. Does a focus on service delivery have a de-politicizing effect that obscures questions of Aboriginal community control and Aboriginal rights? Do the constraints of government models of service delivery limit the ability of urban Aboriginal organizations to articulate, support, or advocate for the

economic needs of their members? Does the programmatic focus on managing budgets and running formal organizations limit the opportunities to build on the natural, non-bureaucratic social support systems that exist in urban communities?

Summary: Contexts Discussion

The above discussion has pointed to some of the key issues that face urban Aboriginal communities as they respond to the need to develop an economic development strategy that is both successful in raising standards of living and in strengthening the cultures, traditions, and identity of Aboriginal community members. The goal of the Network is clear: to enable Aboriginal people in urban areas to participate in the economy as equals; to thrive and prosper as Aboriginal people in an environment that is often hostile to their aspirations and practices, even while it holds out significant promise for a better future.

For practitioners, the Network holds out the promise that their effectiveness can be enhanced with access to the best available knowledge about urban Aboriginal communities. For researchers, the Network is a tremendous opportunity to engage deeply with practitioners, policy makers, and other researchers, and discover ways to enable their research to make a real difference in the conditions in urban Aboriginal communities.

Endnotes

ⁱ 'Aboriginal people' in this discussion paper includes Inuit, Métis, and First Nations.

ⁱⁱ See, e.g., Jack Forbes, "The Urban Tradition among Native Americans", in Lobo, S. and K. Peters, *American Indians and the urban experience*. (Walnut Creek, Calif.: Altimira Press. 2001)

ⁱⁱⁱ A representative text in this regard is *Not strangers in these parts*. (E. J. Peters, D. Newhouse, et al, Eds. Ottawa, Policy Research Initiative, 2003). An excellent overview of the issues associated with urban Aboriginal communities, a significant portion of the contributions focus on the social and demographic realities of urban Aboriginal communities, reflecting the centrality accorded to this aspect of urban Aboriginal life.

^{iv} On migration patterns, see S. Clatworthy, *Factors Influencing the Migration of Registered Indians Between on and Off-Reserve Locations in Canada*. (Ottawa: Research and Analysis Directorate, Indian and Northern Affairs Canada, 2000), and Mary Jane Norris, Martin Cooke and Stewart Clatworthy, "Aboriginal Mobility and Migration Patterns and the Policy Implications", in *Aboriginal Conditions: Research as Public Policy*, J. P. White, P. Maxim and D. Beavon, eds. (Vancouver UBC Press, 2003: 108-130). The US literature on urban Indian communities has numerous examples of detailed discussions of 'migration factors', representing the influence of 'push pull' analyses of urban settlement patterns, a framework drawn by and large from immigration studies. A representative example is James LaGrand, *Indian metropolis: Native Americans in Chicago, 1945-75*. (Urbana: University of Illinois Press, 2002).

On residential patterns (i.e., neighbourhood clustering), see Paul Maxim, Carl Keane and J. White, "Urban Residential Patterns of Aboriginal People in Canada", in *Not Strangers in these Parts: Urban Aboriginal Peoples*. (D. Newhouse and E. Peters, Eds. Ottawa, Policy Research Institute, 2003: 79-91).

Generally, see Jerry White, Paul S. Maxim and Daniel J. K. Beavon, *Aboriginal conditions: research as a foundation for public policy*. (Vancouver: UBC Press, 2003).

^v For a more theoretical (and less demographic) discussion of changing Indigenous identity in an urban context, see M. Barcham, "De)constructing the Politics of Indigeneity", in *Political theory and the rights of indigenous peoples*. D. Ivison, P. Patton and W. Sanders, eds. (London New York, Cambridge University Press, 2002).

^{vi} For a discussion of urban Aboriginal community dynamics, see Craig Proulx, *Reclaiming Aboriginal Justice, Identity, and Community*. (Saskatoon: Purich Publishers, 2003).

^{vii} See generally, Smith, Linda Tuhiwai, *Decolonizing methodologies: research and Indigenous peoples*. (London; New York: Zed Books, 1999). In a Canadian context, see Richard Atleo/Umeek, *Tsawalk: a Nuu-chah-nulth worldview*. (Vancouver UBC Press, 2004).

^{viii} Two examples, one older, one more recent, are Hugh Brody, *Indians on skid row*. (Ottawa: Northern Science Research Group, Dept. of Indian Affairs and Northern Development, 1971), and Craig Proulx, *Reclaiming Aboriginal Justice, Identity, and Community*.

^{ix} See for instance the Assembly of First Nations' resolution in response to the *Misquadis* court decision (AFN Resolution #37, July 22, 2004). The Resolution asserts First Nations' jurisdiction over their members regardless of residency.

^x See Ian Peach, *The Charter of Rights and Off-Reserve First Nations People: A Way to Fill the Public Policy Vacuum?* (Regina: Saskatchewan Institute on Public Policy, 2004), and Janice Stokes, Ian Peach and Raymond B. Blake, *Rethinking the Jurisdictional Divide: The Marginalization of Urban Aboriginal Communities and Federal Policy Responses*. (Regina: Saskatchewan Institute for Public Policy, 2004).

^{xi} Wanda Wuttunee, *Living Rhythms: Lessons in Aboriginal Economic Resilience and Vision*. (Montreal: McGill Queens University Press, 2004).

^{xii} For a discussion of recent court decisions, see Kent McNeil, "Aboriginal Title and the Supreme Court: What's Happening?" (*Saskatchewan Law Review*. 69(2), 2006).

^{xiii} See Gordon Christie, *Challenges to Urban Aboriginal Governance*. (Toronto: Osgoode Hall Law School, 200).

^{xiii} The relationship between development and attempts to gain self-determination have also found interesting expression in the work of Chandler and Lalonde on suicide rates in Aboriginal communities. Chandler, M. J. and C. E. Lalonde (2000). "Cultural continuity as a protective factor against suicide in First Nations youth." *Lifenotes: A Suicide Prevention and Community Health Newsletter* 5 (1): 10-11.

^{xv} See generally, Stephen Cornell, and Joseph P. Kalt, *What can tribes do? : strategies and institutions in American Indian economic development*. Los Angeles: American Indian Studies Center, University of California 1992), and Stephen Cornell, Joseph P. Kalt and Terry L. Anderson, "Culture and Institutions as Public Goods: American Indian Economic Development as a Problem of Collective Action", in *Property rights and Indian economies* (Lanham, MD: Rowman and Littlefield, 1992: 215-252).

^{xvi} In part because of a more developed tradition of neo-institutionalism in Canadian social science. See A. Lecours, *New institutionalism: theory and analysis*. (Toronto: University of Toronto Press. 2005).

^{xvii} See, e.g., Katherine Graham, "Urban Aboriginal Governance in Canada: Paradigms and Prospects", in *Aboriginal self-government in Canada: current trends and issues*, J. H. Hylton, ed. (Saskatoon, Purich Publisher, 1991: 377 - 410.), and David Newhouse, "The Invisible Infrastructure: Urban Aboriginal Institutions and Organizations", in *Not strangers in these parts: urban Aboriginal peoples*, pp: 243-255).

^{xviii} Exceptions to this point include: John Loxley, *Aboriginal Economic Development in Winnipeg*, (Winnipeg: University of Manitoba, 2002), and Craig Proulx, *Reclaiming Aboriginal Justice, Identity, and Community*.

^{xix} See generally Jerry White, Paul S. Maxim and Daniel J. K. Beavon (2003). *Aboriginal conditions : research as a foundation for public policy*.

^{xx} In a Canadian context, John Loxley and Fred Wein have also taken steps in this direction. See, for example, the discussion of institutional capacity for economic development in Winnipeg in J. Loxley and F. Wein "Urban Aboriginal Economic Development", (in *Not strangers in these parts: urban Aboriginal peoples*., 2003) pp: 217 – 242.

In American context, see some of the works on Chicago, including Beck, D. (2002). "Developing a Voice: The Evolution of Self-Determination in an Urban Indian Community." *Wicazo Sa Review* 17(2): 117-141, and James LaGrand, (2002). *Indian metropolis : Native Americans in Chicago, 1945-75*. Urbana: University of Illinois Press.

^{xxi} As discussed in Calvin Hanselmann, *Uncommon Sense: Promising Practices in Urban Aboriginal Policy-Making and Programming*. Calgary: Canada West Foundation, 2002), and *Shared Responsibility: Final Report and Recommendations of the Urban Aboriginal Initiative. A Western Cities Project Report*. (Calgary: Canada West Foundation, 2003).

^{xxii} For a recent discussion of urban Aboriginal involvement (or lack thereof) in policy making, see Nathan Cardinal, "The exclusive city: Identifying, measuring, and drawing attention to Aboriginal and Indigenous experiences in an urban context." (*Cities* 23 (3): 217-228, 2006). A good discussion can also be found in Evelyn Peters, "Indigeneity

and marginalisation: Planning for and with urban Aboriginal communities in Canada." (*Progress in Planning* 63 (4): 327-404, 2005).

^{xxiii} From the *Hawthorn Report* onwards, attempts have been made to map out the relationship between urban Aboriginal communities and governments in terms of the programs and services available to community members. See for instance, Edgar Dosman, *Indians: the urban dilemma*. (Toronto: McClelland and Stewart, 1972); Calvin Hanselmann, *Uncommon Sense: Promising Practices in Urban Aboriginal Policy-Making and Programming*. (Calgary: Canada West Foundation, 2002). For analyses focused on one particular policy area, see Emma LaRocque, "Re-Examining Culturally Appropriate Models in Criminal Justice Applications" in *Aboriginal and Treaty Rights in Canada: Essays in Law, Equality, and Respect for Difference*. M. Asch, ed. (Vancouver, UBC Press: 75-96, 2002), for a study of a particular community, see James Silver and Joan Hay *In their own voices: building urban Aboriginal communities*. (Black Point, N.S.: Fernwood Pub, 2006).

Learning Circles One

A Learning Circle¹ is a small group dialogue designed to encourage people to listen and speak from the heart in a spirit of inquiry. A safe space is created so participants can be trusting, authentic, caring, and open to change. Because the nature of the information we hope will be exchanged between scholars and practitioners, and the history of this form of dialogue among North American Aboriginal people, we believe Learning Circles are an appropriate structure for the transfer of knowledge on urban Aboriginal economic development.

Urban Aboriginal community practitioners face considerable challenges to deliver services and products. They work in an environment of unreliable funding, few supportive institutions, and inconsistent policies and programs that lack strategy. In these ways the urban Aboriginal context is a fractured scene. Creating Learning Circles will bring together practitioners of Aboriginal organizations, and begin to build a common perspective on needs and actions. The stories contributed by the academics and the experiences of practitioners will suggest some options for action. This format will support the exchange of information on what works for urban based Aboriginal organizations, how they can be strengthened, and how their relationships to other organizations can be stronger.

Urban Aboriginal organizations are part of a community fabric of people and organizations. Strengthening these relationships is a step towards building an urban Aboriginal economy. It is these relationships that community businesses rely upon to engage customers, generate capital, provide necessary support services, take advantage of new opportunities, and offer encouragement. Because the fabric of community is a focus, we work towards a holistic – systems thinking² - picture of community development.

Virtually all the ‘systems thinking’ literature, points to the importance of learning as a way to improve systems capacity. Systems gain energy from information and new understanding. We believe Learning Circles, as an instrument for the exchange of information on what works and what does not, provides an appropriate and effective structure for this learning

Learning Circles are not expected to be static. As organizations have changing needs and practitioners changing interests, it is expected that circles will grow, change, find new communities of interest, but continue to be connected. This network of connected Learning Circles, creates a collective voice for resources, builds social capital and supports the ultimate goal of community building. The Learning Circles are the key instrument of fostering network capacity and communities of interest.

¹ Heierbacher, Sandy. “NCDD’S Engagement Streams Framework,” @ www.thataway.org page 4.

² Peter Morgan, European Centre for Development Policy Management “The Idea and Practice of Systems Thinking and their Relevance for Capacity Development,” March 2005. See description below.

Peter Morgan, in his article “The Idea and Practice of Systems Thinking and their Relevance for Capacity Development” describes systems thinking as a way of mentally framing what we see in the world. It is a way of thinking that looks at the ‘whole’ first with its fit and relationship to its environment as a primary concern. Attention to the constituent elements or parts of the system is secondary. Systems thinking is more an orientation or a perspective than it is a formula or prescription. It can be used to help people understand how systems work and how people can deal with them more effectively. It is a way of exploring real life rather than representing it. It is a technique to figure out what’s going on. It encourages people to look for patterns of interaction and underlying structures that shape the emergent patterns of systems behavior. A corollary to this approach is the idea that structures matter much more than individual events in terms of determining outcomes.

Morgan goes on to say that the focus of systems thinking moves in a variety of different directions compared to the linear style of conventional thinking. It is more than lateral thinking. It is also vertical and horizontal and circular. Systems thinking pays much more attention to movement and dynamics. Systems thinking is oriented more towards capturing flow and movement. In particular, it focuses on processes, patterns and relationships. What matters more is understanding the effects of the interactions as opposed to detailed efforts to predict outcomes. Systems thinking also assumes a good deal of randomness and unanticipated consequences that cannot be foreseen even under the most laborious exercises in risk analysis.

Systems thinking pays little attention to the idea of ‘objective’ knowledge ‘out there’ that can be collected to make a particular case. It takes a post-modern way of seeing the world. Nothing is objective and independent of its context. The reality of a system and its behavior depends on the nature of its relationships and the eye of the beholder. It assumes that no single actor will have a comprehensive view of a process such as capacity development. The choice of every analytical exercise to look at some things and not others changes the nature of the system.

Learning Circle Two: Basic Guidelines for Calling a Circle

This piece, slightly altered from PeerSpirit, Inc – an educational company devoted to building communities of reflection - outlines the process of a Learning Circle.

See: <http://www.peerspirit.com/htmlpages/circlebasics.html>

The circle, or council, is an ancient form of meeting that has gathered human beings into respectful conversation for thousands of years. The circle has served as the foundation for many cultures.

What transforms a meeting into a circle is the willingness of people to shift from informal socializing or opinionated discussion into a receptive attitude of thoughtful speaking and deep listening and to embody and practice the structures outlined here.

THE COMPONENTS OF THE CIRCLE

- Intention
- Welcome Start-point
- Centre and Check-in/Greeting
- Agreements
- Three Principles and Three Practices
- Guardian of process
- Check-out and Farewell

INTENTION

Intention shapes the circle and determines who will come, how long the circle will meet, and what kinds of outcomes are to be expected. The caller of the circle spends time articulating intention and invitation.

WELCOME OR START-POINT

Once people have gathered, it is helpful for the host, or a volunteer participant, to begin the circle with a gesture that shifts people's attention from social space to council space. This gesture of welcome may be a moment of silence, reading a poem, or listening to a song-- whatever invites centering.

ESTABLISHING THE CENTER

The center of a circle is like the hub of a wheel: all energies pass through it, and it holds the rim together. To help people remember how the hub helps the group, the center of a circle usually holds objects that represent the intention of the circle. Any symbol that fits this purpose or adds beauty will serve: flowers, a bowl or basket, a candle.

CHECK-IN/GREETING

Check-in helps people into a frame of mind for council and reminds everyone of their commitment to the expressed intention. It insures that people are truly present. Verbal sharing,

especially a brief story, weaves the interpersonal net. Check-in usually starts with a volunteer and proceeds around the circle. If an individual is not ready to speak, the turn is passed and another opportunity is offered after others have spoken. Sometimes people place individual objects in the center as a way of signifying their presence and relationship to the intention.

SETTING CIRCLE AGREEMENTS:

The use of agreements allows all members to have a free and profound exchange, to respect a diversity of views, and to share responsibility for the well being and direction of the group. Agreements often used include:

- We will hold stories or personal material in confidentiality.
- We listen to each other with compassion and curiosity.
- We ask for what we need and offer what we can.
- We agree to employ a group guardian to watch our need, timing, and energy.
- We agree to pause at a signal, and to call for that signal when we feel the need to pause.

THREE PRINCIPLES:

The circle is an all leader group.

1. **Leadership rotates** among all circle members.
2. **Responsibility is shared** for the quality of experience.
3. People **place ultimate reliance on inspiration** (or spirit), rather than on any personal agenda.

THREE PRACTICES:

1. To speak with intention: noting what has relevance to the conversation in the moment.
2. To listen with attention: respectful of the learning process for all members of the group.
3. To tend the well being of the circle: remaining aware of the impact of our contributions.

FORMS OF COUNCIL:

The circle commonly uses three forms of council: talking piece, conversation and reflection.

Talking piece council is often used as part of check-in, check-out, and whenever there is a desire to slow down the conversation, collect all voices and contributions, and be able to speak without interruption.

Conversation council is often used to when reaction, interaction, and an interjection of new ideas, thoughts and opinions are needed.

Reflection, or Silent council gives each member time and space to reflect on what is occurring, or needs to occur, in the course of a meeting. Silence may be called so that each person can consider the role or impact they are having on the group, or to help the group realign with their intention, or to sit with a question until there is clarity.

GUARDIAN

The single most important tool for aiding self-governance and bringing the circle back to intention is the role of the guardian. To provide a guardian, one circle member at a time volunteers to watch and safeguard group energy and observe the circle's process.

The guardian usually employs a gentle noisemaker (such as a chime, bell, or rattle) that signals everyone to stop action, take a breath, rest in a space of silence. Then the guardian makes this signal again and speaks to why he/she called the pause. Any member may call for a pause.

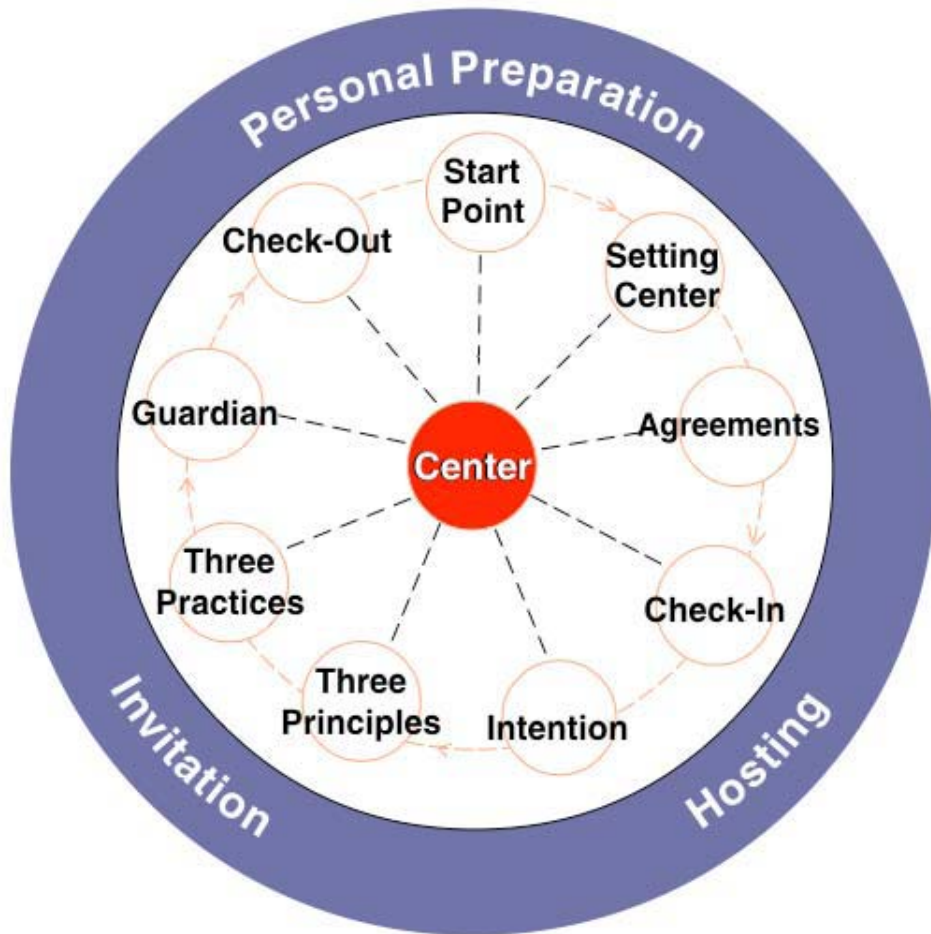
CHECKOUT AND FAREWELL

At the close of a circle meeting, it is important to allow a few minutes for each person to comment on what they learned, or what stays in their heart and mind as they leave.

Closing the circle by checking out provides a formal end to the meeting, a chance for members to reflect on what has transpired, and to pick up objects if they have placed something in the center. As people shift from council space to social space or private time, they release each other from the intensity of attention being in circle requires.

Often after check-out, the host, guardian, or a volunteer will offer a few inspirational words of farewell, or signal a few seconds of silence before the circle is released. May your circles be great teachers and places to rest on the journey.

The Components of Circle



Source:

 PeerSpirit™
Building Communities of
Reflection, Adventure and Purpose

Founded by: Christina Baldwin and Ann Linnea
PO Box 550, Langley, WA 98260 USA • 360-331-3580 • www.peerspirit.com

Learning Circle Three: Citizenship and the Creation of Community

Peter Block, 2003

Community is built not by specialized expertise, or great leadership. Community grows out of the possibility of citizenship*. The citizenship we are speaking of is not that of voting rights or what nation we belong to. **Citizenship that builds community** is a state of being where we have the boldness to:

1. Hold ourselves accountable for the well being of the larger institution of which we are a part.
2. Choose to own and exercise power rather than defer or delegate it to others.
3. Give form to a collective possibility that creates hospitable community its own sense of being.

Problems, such as performance, productivity, accountability, and success in a marketplace will not be resolved through better leadership and more expertise. **Organizational transformation occurs through a new realm of conversation among members**, or what we call here, citizens. Citizens surrender their power when they allow themselves to become consumers or clients of solutions provided by leaders and experts. When citizens retrieve control over their concerns from leaders and experts, they can engage in a new realm of conversation for possibility that can provide new access and power in dealing with the problems arising from a breakdown in community.

The possibility this creates is an institution, society, or culture of accountability and commitment. Chosen accountability and commitment are the means for a society that works for all. This is the essence of reconciliation. In contrast to an institution shaped by policy, practices, goals and programs, it creates a society shaped by its possibility*.

This kind of institution or community takes its identity from the kind of commitments its members (citizens) make to each other. These are commitments made without quid pro quo, barter, or exchange. In this kind of society, accountability replaces entitlement, commitment replaces negotiation, and conversation replaces persuasion and manipulation. Isolation and reticence evolve into connectedness and activism, which gives us community that is alive.

Shifting the way we design and convene community gives us access to this collective and infectious aliveness. We can name this the architecture of social space, because it is an architectural phenomenon as well as a linguistic phenomenon. The tools of this architecture are embedded in these powers:

The Power of Place

Whatever room or place we are in at the moment is a model for the larger world we want to create. It is not just the means to the destination or the end we have in mind, it is that place itself.

It is in this place that the possibility begins. All that comes afterward may deepen, clarify, and expand, but if it does not begin in this room, with these people, under these conditions, then the possibility has been postponed.

Knowing this gives new meaning and importance to the elements of the room: the arrangement of seats, the walls, the floor, the quality of the light, the food, and the sound system that allows all voices to be heard.

The Power of the Small Group

The small group is the unit of change. It is communal and becomes an antidote to patriarchy, elitism, and the closely held expertise that becomes a substitute for citizenship. The circle is the symbol for community, and the small group is the essential element of community. However we congregate, the configuration of the small group seated in a circle is the cornerstone of the gathering.

The Power of Invitation

It matters how we come to this place, this group. Invitation is a powerful act of openness, generosity, and inclusion. It is essential to enrollment.

A true invitation evokes choice. We have the freedom to accept or refuse. Recognizing and exercising that freedom of choice naturally calls us to be responsible for our answer. It is this combination of choice and responsibility that gives volunteerism its power.

Accepting an invitation always carries a cost. There is a cost to you personally, and there is a cost to others in your life. Recognizing that we have given up something to be here adds meaning to the fact we that came.

The Power of Reception

We are intentional towards those who answer our call. We welcome them for the act of showing up. Many have paid a price for their attendance and this must be honored. It takes courage to show up, for each one knows that once they walk into the room something will be demanded of them, and it will be much more than they ever expected. It is our hospitality that supports this courage.

The Power of Context

Context is the possibility that gives rise to this moment. It is why we are here. As such it is both decisive and in each of our hands.

We begin each gathering with a statement of context by the convener. As a member of the group, I need to know why I was invited. This is our first question. Why did I come? is my second question. Like two sides of a coin, invitation and acceptance constitute the full context for our coming together.

The context or purpose of the convener alone is incomplete -- a partial sentence and a death sentence. A lecture or presentation without connection is not a conversation. Gathering for the sake of persuasion is living out a context of authority that produces a void, with no place to stand, only silence with our arms folded.

The mutual creation of a new context becomes the beginning of the new conversation and balances power in service of accountability and commitment. Why they invited us begins the conversation, why we chose to come completes it.

The Power of Connection

Creating and realizing an alternative future that wasn't going to happen anyway requires a foundation of relatedness. Connection and being related precedes content. We need to be reminded we are not isolated or alone -- each time we enter the room. Connection and relatedness creates the trust and social space where we find our own voice and each person is heard in a way that reveals the humanity that we all hold in common.

The Power of No

There has to be space for doubts, questions, and even ultimately saying No. This is done without explanation. For every request or demand made upon us, we hold the freedom to say No cleanly, blame-free as a matter of choice. The presence of this possibility is the precondition of commitment. If I cannot say no, then my yes means nothing. The act of refusal is the beginning of a new conversation.

The Power of New Conversation

A new conversation is the energy source and lifeblood of community. In the absence of a new conversation, we are sentenced to have the old conversation over and over and over again. Repeating the same conversation is the source of our cynicism.

The new conversation is dialogue without advice. It is being authentic about our inauthenticity. It begins with a statement of our own contribution to the problem, sometimes called confession.

It entails the pursuit of increasingly powerful and confronting questions. In this context, the questions are more important than the answers. The most frequent and least useful question is: What are we going to do? This question should be postponed until the answer to it reveals itself from the power, depth and authenticity of the dialogue.

The Power of Commitment

We recognize the power of speech called declaration. A commitment is a declaration made without barter and with no expectation of return. It is made for its own sake, as virtue is its own reward.

Our commitment comes to life when we make it public. We make a statement of commitment, a declaration, to the small group first, for this group stands in for all in the community. Authentic commitment also requires us to name the price we are willing to pay for this commitment, and the cost that this commitment places on other people.

The Power of Gifts

The possibility of community is the possibility of bringing everyone's gifts into the center. Volunteerism, the action path of citizenship, has no interest in deficiencies, only in strengths. The customer or client stance, by contrast, is vitally interested in deficiencies and needs, for they are the basis on which we are serviced, led, and ultimately controlled.

When we recognize and state to another how their actions had meaning and value for us; in other words when we take their gifts into our hearts, we affirm the healing power of community. We live into a future where each of us has something vital and life-giving to offer.

The Point

These powers are elements that create the experience of community and in turn the outcomes we desire for our institutions. They outline the architectural elements of social space and of convening community. They are both spatial and linguistic. The architecture of the room -- combined with the way the room is occupied, the social space -- gives concrete form to a group of human beings choosing accountability, commitment, and, ultimately, choosing to care for the whole. We might say such a group creates a communal clearing for citizens, in which our possibilities can be realized.

**Many of the thoughts presented here, especially the concepts of citizenship and possibility, come from the wonderful thinking and work of John McKnight and Werner Erhard.*

Learning Circle Four: Guidelines for Participation

Participation is what study circles are all about. Participants must be willing to **"own" the Learning Circle**, to set goals and work toward them and to take responsibility for their own learning. The organizer sets up the Learning Circle and the facilitator guides the discussion while the participants cooperate to make it work.

Here are some suggestions to help you get the most out of your Learning Circle experience. They apply to a range of Learning Circle situations.

- The group process works best when the members become familiar with each other.
- Listen carefully to others. Make notes so you can concentrate on listening rather than on what you want to say next. You learn from listening to the others and you have to listen to keep up with what's being said.
- Take your turn and pass it on. Give others a chance to speak. It is important for everyone to be heard.
- Help keep the discussion on topic. Make sure your comments are relevant and make them while they are pertinent.
- Address your remarks to the group rather than the facilitator. Question other participants to find out more about their ideas.
- Communicate your needs to the facilitator. He/she is responsible for summarizing key ideas and seeking clarification of points. You will not be the only one who doesn't understand what someone has said.
- Do take part in the discussion. Everyone in the group has unique experience and knowledge. This variety makes the discussion interesting. Don't feel pressured to speak before you are ready but realize that your contribution is valuable.
- Engage in friendly disagreement. Challenge ideas and opinions you disagree with and expect to have to explain your own. Humor and a pleasant manner help you make your points and keep the disagreements friendly. There is no place here for rudeness or belligerence.
- Respect the position of those who disagree with you. Strive to understand their point of view. Making a good case for positions you disagree with makes you better understand your own.

- Keep an open mind. This is your chance to explore ideas you may not have considered before. You gain nothing by stubbornly sticking to the points you made earlier.

The following guidelines should be posted in the room for all to see.

Guidelines for Participation

- **Learn about one another – become familiar**
- **Listen carefully – make notes to focus on listening**
- **Take your turn – important everyone is heard**
- **Help keep discussion on topic**
- **Address remarks to the group not the facilitator**
- **Let facilitator know if it isn't working for you**
- **Take part – everyone has unique experience and knowledge**
- **Engage in friendly disagreement - challenge ideas**
- **Respect all opinions**
- **Humor helps**

Learning Circle Five: Facilitating a Learning Circle

The following suggestions for facilitating Learning Circle have been gathered from a variety of sources.

Introduction

A Learning Circle is an important communication tool in all stages of culture change, the circle makes everyone equal. The rules of the circle help those who typically talk and have the most authority be quiet and listen. And, it encourages those who are typically shy or don't have much formal authority to speak up. It can be used as an activity just to get people talking or as a way to let everybody weigh in when there is a decision to be made. Here's how it goes...

- One person is chosen to facilitate.
- The facilitator poses a question or issue and asks for a volunteer.
- The volunteer shares his or her answer or view and then the person sitting to the right or left of that person goes next.
- The process continues around the circle until all have shared.
- There is no cross-talk during this process.
- A person may choose to pass, but after everyone else has shared, the facilitator should offer that person another opportunity to express his or her view.
- Once everyone has shared, the floor is open for general discussion.

Assist the group process

- Guide the discussion according to the ground rules, but remain neutral.
- Keep the group focused on the content of the discussion. Monitor how well the participants are communicating with each other - who has spoken, who hasn't spoken, and whose points have not yet received a fair hearing.
- Consider splitting up into smaller groups to examine a variety of viewpoints or to give people a chance to talk more easily about their personal connection to the issue. Giving each small group the task of making the best possible case for an option is very effective.

- When you have to intervene, put it off as long as you can. Too many interruptions stifle discussion. Let it go until you are sure they are not coming back to the topic.
- Don't talk after each comment or answer every question; allow participants to respond directly to each other. The most effective facilitators often say little, but are always thinking about how to move the group toward its goals.
- Don't be afraid of silence. It will sometimes take a while for someone to offer an answer to a question you pose. People need time to think.
- Don't let anyone dominate; try to involve everyone.
- Remember that a study circle is not a debate but a group dialogue. If participants forget this, don't hesitate to ask the group to help re-establish the ground rules.

Help the group grapple with the content

- Make sure they consider a wide range of views. Ask them to think about the advantages and disadvantages of different ways of looking at an issue or solving a problem. In this way, the tradeoffs involved in making tough choices become apparent.
- Ask participants to think about the concerns and values that underlie their beliefs.
- Either summarize the discussion occasionally or encourage group members to do so.
- Help participants to identify common ground, but don't try to force consensus.

Use questions to help make the discussion more productive

- Prepare lots of questions.

Learning Circle Six: Scharmer

The following excerpts were taken from Otto Scharmer's book **Theory U: Leading from the Future as it Emerges**, 2007 chapter 21.

Principles and Practices of Presencing for Leading Profound Innovation and Change

Checklist for co-initiating or sparking common intention among diverse core players:

- An intention to serve the evolution of the whole.
- Trust your “heart’s intelligence” when connecting with people or exploring possibilities that may seem unrelated to the strategic issue at hand. Be open-minded to other ways of framing the real issue or opportunity (different key stakeholders will emphasize different aspects and variables).
- Connect with people professionally and personally: try to connect with their highest future sense of purpose (Self and Work), not just with their institutional role and responsibility.
- Include, when convening a core group meeting, executive sponsors and key decision makers who have a deep professional and personal interest in exploring and shaping the opportunity.
- Include activists in the core group: people who would give life and soul to make it work. Without this personal passion and commitment, nothing radically new will ever come into being.
- Include people with little or no voice in the current system: patients in the case of health care, students in the case of schools, customers or NGOs in the case of business organizations, future participants in the case of the leadership development project (ELIAS).
- Include key knowledge suppliers to the degree necessary to build a support team and infrastructure (helper/consultant, internal or external).
- Shape the time, place, and context to convene this constellation of people for co-inspiring the way forward (sense and seize opportunity).

To create focus and commitment, clarify:

What: what you want to create

Why: why it matters

How: the process that will get you there

Who: the roles and responsibilities of the players involved

When, where: the road map forward

Additional goals:

- To uncover common ground by sharing the context and story that brought us here.
- To spark inspiration for the future by a collective description of the future.
- To use dialogue interviews and in depth case studies.
- To identify the core people to speak and the organizations to contact.
- To give people an experience that embodies a first *feel* of the future that the project wants to create.

Identify your own list of questions:

1. What is your most important objective, and how can the Circle help you realize it?
2. What criteria will you use to assess whether the Circle's contribution to your work has been successful?
3. If the Circle were to do two things within the next six months, what two things would create the most value and benefit for you? T h e o r y U 397
4. What, if any, historical tensions and/or systemic barriers have made it difficult for you to fulfill your requirements and expectations? What is it that is getting into our way?

World Café method focuses on:

Interaction on multiple levels (threaded conversations from table to table and whole-group conversations) using seven simple café principles:

- clarify the context;
- create a hospitable environment;
- explore questions that matter;
- encourage everyone's contribution;
- connect diverse perspectives;
- listen—deeply—for insights and further questions; and then
- harvest or collect discoveries and share them with the larger group.

For more details, see www.theworldcafe.com.5

The Location

The location of the Learning Circle must be carefully selected and prepared: physically and logistically, mentally and emotionally, and intentionally and spiritually. It cannot be an office. It should be a remote space with a centered and focused energy, with windows on two (or three)

sides and access to nature for an extended time period, and it should be spacious enough for the whole Circle to work.

Practice: Having seen how some of my student and executive groups succeed and fail with this concept, I offer the following notes on place, people, purpose, and process for use in exploring this principle with your own group.

Place: Form this circle in a meeting space that is hospitable and yet cocoon-like and provides a sense of intimacy away from exterior disruptions. Apply all the well-known criteria of good meeting spaces: spaciousness, natural light, windows on at least two sides of the room, simplicity, beauty. Introduce whatever makes the place feel alive, whatever makes you feel at home.

People: A group of six to ten people is probably ideal, although sometimes a “group” of two can also work. It’s not necessary (or even helpful) for this circle to be limited to your established (old) friends. What matters most is that you personally feel some bond or (possible future) connection. The group should consist of people who are interested in regularly exploring some of the deeper issues of their personal and professional journeys and how they relate to organizational and societal transformation—people who share this interest because of a *deeply felt need* to pursue this deeper inquiry, not just out of purely intellectual curiosity. You want people who are willing to put themselves on the line, not those who would limit their role to sitting in the audience to criticize others. You want people who may be connected to your future journey; you don’t want to get stuck in the mud of past karma.

Outcomes: If conducted in the right way, it will be a deep personal and collective experience that touches and profoundly resonates with the whole being. The facilitator throughout that week needs to be in full awareness of the deeper change that this process activates. They need to hold the space and align their intention with fully serving the highest future possibility of that group or the community that is going through that eye-of-the-needle process.

Purpose: As you pull your first meeting together, uncover a common intention that is larger than yourself. Create or discover a purpose that connects the being of your circle to the larger global field that you and the members of your circle feel a part of. Connect the presence of the circle to serving the larger whole: the Circle Being, as the Circle of Seven describes it.

Process: Develop a process that works for you and your group. As the circle evolves, that process is likely to change. Yet you may want to consider some basic building blocks such as inviting intentional silence, using a personal check-in, holding a speaking object for as long as you talk, story sharing about the golden thread in one’s life’s journey, cultivating deep listening, and developing the personal courage to raise issues and discuss challenges that are current and require real trust to be shared.

It’s a creative or spiritual

Economics that describes a quality of energy dynamics that highly creative people and high-performing teams are able to activate and thrive on. It functions on a simple principle: *If you give all you have and all you are to your essential project, everything will be given to you.* But notice the sequence: first you have to give everything away, and only *then* will everything you need be given to you—maybe. That’s a different kind of economics. It has nothing to do with exchange value. What it describes is a gift economy: the more you give, the more amplified you get. But it works only if you fully let go of what you give without the certainty of getting anything in return. This kind of creative or spiritual economics is at the heart of every profound innovation in science, business, and society. The spiritual energy economics at issue here can be summarized in a simple equation: $E = D m$. Personal energy (E) is a function of making a difference (D) in something that matters to me (m).

“One of my favorite sayings, attributed to Margaret Mead, has always been ‘Never doubt that a small group of committed citizens can change the world. Indeed, it’s the only thing that ever has.’

16. Prototype strategic microcosms as a landing strip for the emerging future.

A prototype is an experiential microcosm of the future that you want to create. Prototyping means to present your idea (or work in progress) before it is fully developed. The purpose of prototyping is to generate feed-back from all stakeholders (about how it looks, how it feels, how it connects with people’s intentions, interpretations, and identities) in order to refine the assumptions about the project. The focus is on exploring the future by doing rather than by analyzing. As the folks at IDEO have put it, as we read in Chapter 13, the rationale of prototyping is “to fail often to succeed sooner” or to “fail early to learn quickly.” Prototyping is not a pilot project. A pilot has to be a success; by contrast, a prototype focuses on maximizing learning.

Example (of prototyping in a corporate context): At Cisco Systems, the world leader in networking equipment, the prototyping imperative begins with what that company calls principle 0.8: regardless of how long term the project, engineers are expected to come up with a first prototype within three or four months—otherwise the project is dead. The first prototype is not expected to work like a 1.0 prototype—it is a quick-and-dirty iteration that generates feedback from all key stakeholders and leads to the 1.0 version.

Practice: To create a strategic microcosm requires you to focus on three areas: players, project, and infrastructure. Here is a checklist for each item.

Convening the players: A strategic microcosm connects key players across boundaries who need one another in order to take their system into the best future way of operating. For a microcosm constellation to be productive, it usually needs five types of practitioners: (1) practitioners who are accountable for results (problem owners, such as the CEO of the hospital); (2) practitioners on the front line who know the real problems first hand (e.g., physicians); (3) people at the bottom of the system who normally have no voice

and no say about how others spend their money and who bring a different view and focus that can help to reframe the overall issue (e.g., patients or citizens); (4) people outside the system who can offer a view or a competence critical to the success of the project (creative outsiders); and (5) one or a few activists who are wholly committed to making the project work (who have the right heart and who are willing to give their lives to make it work).

Another view of these five categories is to determine who should *not* be involved: you don't want 90 percent "experts" (who tend to be the world champions in downloading—exceptions confirm this rule); you don't want people who are only interested in defending the status quo—in short, you don't want people who, when they use the word "change," mean that only *other people* need to change. You want to link and convene players who have the networks, knowledge, power, and intention to co-create change across boundaries for the benefit of the whole. And you want to keep the group small enough to get the work done. Larger groups may need to set up subgroups in order to work efficiently. As a rule of thumb, the more comprehensive the representation of all current stakeholders, the slower the process. The more selective the microcosm, the faster you can move to rapid-cycle prototyping.

Selecting the project: Here are seven questions to ask as you select and evolve an idea for prototyping.

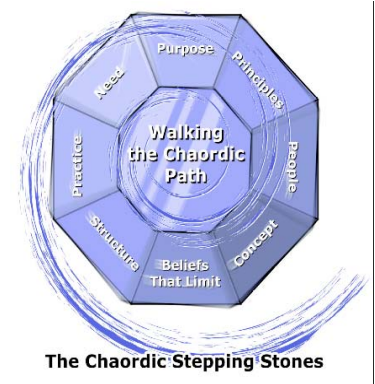
1. Is it relevant—does it matter to the stakeholders involved? Select a problem or an opportunity that is relevant individually (for the persons involved), institutionally (for the organizations involved), and socially (for the communities involved).
2. Is it revolutionary—is it new? Could it change the game?
3. Is it rapid—can you do it quickly? You must be able to develop experiments right away, in order to have enough time to get feedback and adapt (and thus avoid analysis paralysis).
4. Is it rough—can you do it on a small scale? Can you do it at the lowest possible resolution that allows for meaningful experimentation? Can you do it locally? Let the local context teach you how to get it right. Trust that the right helpers and collaborators will show up when you issue the right kinds of invitations.
5. Is it right—can you see the whole in the microcosm that you focus on? Get the dimensions of the problem or project definition right. In a prototype you put the spotlight on a few selected details. Select the right ones. For example, when doing the patient-physician study we didn't focus on all the stakeholders. We started with two: patients and their physicians. You have to be courageous in making these choices, and you have to be right—right in the sense that you clearly see the core axis or core issue of the system. Ignoring the patients in a health study, the consumers in a sustainable food project, or the students in a school project (just to name a few examples that I have encountered recently) misses the point.
6. Is it relationally effective—does it leverage the strengths, competencies and possibilities of the existing networks and communities at hand?

7. Is it replicable—can you scale it?

The Chaordic Stepping Stones

The chaordic path is the path that walks between chaos and order. When we don't know where we are going, or what the future needs for us, we can bring a little bit of form to our work by working with clear steps. These steps are intended to create generative structures, structures that allow us to create together, without stifling creativity and the emergence of new ideas and new ways of doing things.

There are clear strategic steps we take when walking the Chaordic path. These steps allow us to create steps rooted in real need that are sustainable for the community they serve and the people working within them. These steps can be used both as a planning tool and to help understand what you are discovering about an organization, community or initiative



In designing an initiative like this, we use these stepping stones in order. Think of them nested one within the other. You cannot build the next one until the previous one is in place.

The Stepping Stones

Each of these stepping stones is activated by asking key questions. As we design our work together we will select from these questions (or design others) to help us explore each stone as we lay it in place.

Need

The need is the compelling reason for doing anything. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant. The need is outside of our work: it is the thing that is served by the work you are doing.

- What time is it in the world now?
- What time is it for our initiative now?
- What are the challenges and opportunities we are facing?
- What do I really need to be able to understand and work on in the world?
- What is the need that this project can uniquely meet?
- What does the world need this conference to be?

Purpose

From the need flows the purpose. Purpose statements are clear and compelling and the guide us in doing our best possible work.

- If this work should live up to its fullest potential, what do you dream (or vision) is possible?
- What is the purpose we can adopt that will best meet the need?
- What could this work do/create/inspire?
- What is the next level for the for our work? Where should we be heading?
- What is the simplest and most powerful question we could keep at the core of our work?

Principles

Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.

- What are the principles we want to enact at for our learning networks?
- What is it important to remember about how we want to work with the participants in our initiative?
- What do we think is most important to remember as we design to meet the need and purpose?
- What unique ways of doing work and being together can we bring to this work?
- If our team should live up to its fullest potential - what do you dream (or vision) possible for this team?

People

Once the need and the purpose are in the place and we have agreed on our principles of co-operation, we can begin to identify the people that are involved in our work. Mapping the network helps us to see who is in this work for us and who will have an interest in what we are doing.

- Who is in the room?
- Who is not in the room and how do we bring them in?
- How do we leverage relationships to propagate the ideas generated by our work together?

- Who will be interested in the results of our work?

Concept

As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high level look at the shape of our endeavour. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept is important, because it gives form to very different structures for doing our work.

In our work together we might explore here the different kinds of structures including circles and networks and really understand what these are, how they operate, how they are embedded with various contexts and cultures and what implications each has for our work.

- What are the shapes that we might choose for our work?
- What is the deeper pattern of our work and what organizational forms are in alignment with that?
- How might we activate our principles to best do our work?

Limiting beliefs

So much of what we do when we organize ourselves is based on unquestioned models of behaviour. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models and approaches. It pays to examine ways in which we assume work gets done in order to discover the new ways that might serve work with new results. Engaging in this work together brings us into a co-creative working relationship, where we can help each other into new and powerful ways of working together, alleviating the fear and anxiety of the unknown.

- What makes us tremble, and what do we fear about new ways of working together?
- Who would we be without our stories of old ways of working?
- What will it take for us to fully enter into working in new and unfamiliar ways?
- What is our own learning edge in working together?

Structure

Once the concept has been chosen, it is time to create the structure that will channel our resources. It is in these conversations that we make decisions about the resources of the group: time, money, energy, commitment, and attention.

- Who are we becoming when we meet and work together this way?

- How do we support the aspirations of the group?
- What is the lightest structure that will serve our purpose and need?
- What role might the Core team play when the project is over?
- How do we wisely combine the various organizational concepts to support our work and sustain the results?

Practice

The ongoing practice within the structures we build is important. This is the world of to do lists, conference calls and email exchanges. The invitation here is to practice working with one another in alignment with the designs we have created.

- What do we need to do to sustain our work together?
- What is our own practice of working in networks?
- How do we leverage relationships and support the work that arises from them?
- How do we sustain and nourish our relationships and collective aspirations?
- What commitments are we willing to make to contribute to the success of our endeavour?

Harvest

There is no point in doing work in the world unless we plan to harvest the fruits of our labours. Harvesting includes making meaning of our work, telling the story and feeding forward our results so that they have the desired impacts in the world.

- What are the forms of harvest from our work that best serves the need?
- What intentional harvest will serve our purpose?
- What are the artefacts that will be the most powerful representations of what we have created?
- How will we carry the DNA of our work forward?
- What are the feedback loops that we need to design to ensure that learning and change accelerates itself?
- How will we stay open to emergent learning?

- What are the questions we need to carry about what we are learning by meeting this way?

Lifecycle of Emergence

Using Emergence to Take Social Innovations to Scale

Margaret Wheatley & Deborah Frieze, ©2006

Despite current ads and slogans, the world doesn't change one person at a time. It changes as networks of relationships form among people who discover they share a common cause and vision of what's possible. This is good news for those of us intent on changing the world and creating a positive future. Rather than worry about critical mass, our work is to foster critical connections. We don't need to convince large numbers of people to change; instead, we need to connect with kindred spirits. Through these relationships, we will develop the new knowledge, practices, courage, and commitment that lead to broad-based change.

But networks aren't the whole story. As networks grow and transform into active, working communities of practice, we discover how Life truly changes, which is through emergence. When separate, local efforts connect with each other as *networks*, then strengthen as *communities of practice*, suddenly and surprisingly a new system emerges at a greater level of scale. This *system of influence* possesses qualities and capacities that were unknown in the individuals. It isn't that they were hidden; they simply don't exist until the system emerges. They are properties of the system, not the individual, but once there, individuals possess them. And the system that emerges always possesses greater power and influence than is possible through planned, incremental change. Emergence is how Life creates radical change and takes things to scale.

Since its inception in 1992, The Berkana Institute has been experimenting with the lifecycle of emergence: how living systems begin as networks, shift to intentional communities of practice, and evolve into powerful systems capable of global influence. Through our work with communities in many different nations, we are learning what's possible when we connect people across difference and distance. By applying the lessons of living systems and working intentionally with emergence and its lifecycle, we are demonstrating how local social innovation can be taken to scale and provide solutions to many of the world's most intractable issues—such as community health, ecological sustainability and economic self-reliance.

Why We Need to Understand Networks

Researchers and social activists are beginning to discover the power of networks and networking. And there is a growing recognition that networks are the new form of organizing. Evidence of self-organized networks is everywhere: social activists, terrorist groups, drug cartels, street gangs, web-based interest groups. While we now see these everywhere, it is not because they're a new form of organizing. It's because we've removed our old paradigm blinders that look for hierarchy and control mechanisms in the belief that organization only happens through human will and intervention.

Networks are the only form of organization used by living systems on this planet. These networks result from self-organization, where individuals or species recognize their interdependence and organize in ways that support the diversity and viability of all. Networks create the conditions for emergence, which is how Life changes. Because networks are the first stage in emergence, it is essential that we understand their dynamics and how they develop into communities and then systems.

Yet much of the current work on networks displays old paradigm bias. In social network analysis, physical representations of the network are created by mapping relationships. This is useful for convincing people that networks exist, and people are often fascinated to see the network made visible. Other network analysts name roles played by members of the network or make distinctions between different parts of the network, such as core and periphery. It may not be the intent of these researchers, but their work is often used by leaders to find ways to manipulate the network, to use it in a traditional and controlling way.

What's missing in these analyses is an exploration of the dynamics of networks:

- Why do networks form? What are the conditions that support their creation?
- What keeps a network alive and growing? What keeps members connected?
- What type of leadership is required? Why do people become leaders?
- What type of leadership interferes with or destroys the network?
- What happens after a healthy network forms? What's next?
- If we understand these dynamics and the lifecycle of emergence, what can we do as leaders, activists and social entrepreneurs to intentionally foster emergence?

What is Emergence?

Emergence violates so many of our Western assumptions of how change happens that it often takes quite a while to understand it. In nature, change never happens as a result of top-down, pre-conceived strategic plans, or from the mandate of any single individual or boss. Change begins as local actions spring up simultaneously in many different areas. If these changes remain disconnected, nothing happens beyond each locale. However, when they become connected, local actions can emerge as a powerful system with influence at a more global or comprehensive level. (Global here means a larger scale, not necessarily the entire planet.)

These powerful emergent phenomena appear suddenly and surprisingly. Think about how the Berlin Wall suddenly came down, how the Soviet Union ended, how corporate power quickly came to dominate globally. In each case, there were many local actions and decisions, most of which were invisible and unknown to each other, and none of which was powerful enough by itself to create change. But when these local changes coalesced, new power emerged. What

could not be accomplished by diplomacy, politics, protests, or strategy suddenly happened. And when each materialized, most were surprised. Emergent phenomena always have these characteristics: They exert much more power than the sum of their parts; they always possess new capacities different from the local actions that engendered them; they always surprise us by their appearance.

It is important to note that emergence always results in a powerful system that has many more capacities than could ever be predicted by analyzing the individual parts. We see this in the behavior of hive insects such as bees and termites. Individual ants possess none of the intelligence or skills that are in the hive. No matter how intently scientists study the behavior of individual ants, they can never see the behavior of the hive. Yet once the hive forms, each ant acts with the intelligence and skillfulness of the whole.

This aspect of emergence has profound implications for social entrepreneurs. Instead of developing them individually as leaders and skillful practitioners, we would do better to connect them to like-minded others and create the conditions for emergence. The skills and capacities needed by them will be found in the system that emerges, not in better training programs.

Because emergence only happens through connections, Berkana has developed a four stage model that catalyzes connections as the means to achieve global level change: Name, Connect, Nourish, Illuminate (see Appendix). We focus on discovering pioneering efforts and **nam**ing them as such. We then **connect** these efforts to other similar work globally. We **nourish** this network in many ways, but most essentially through creating opportunities for learning and sharing experiences and shifting into communities of practice. We also **illuminate** these pioneering efforts so that many more people will learn from them. We are attempting to work intentionally with emergence so that small, local efforts can become a global force for change.

The Lifecycle of Emergence

Stage One: Networks. We live in a time when coalitions, alliances and networks are forming as the means to create societal change. There are ever more networks and now, networks of networks. These networks are essential for people finding likeminded others, the first stage in the lifecycle of emergence. It's important to note that networks are only the beginning. They are based on self-interest--people usually network together for their own benefit and to develop their own work. Networks tend to have fluid membership; people move in and out of them based on how much they personally benefit from participating.



Networks:
Discovering Shared Meaning and Purpose

Stage Two: Communities of Practice.

Networks make it possible for people to find others engaged in similar work. The second stage of emergence is the development of communities of practice (CoPs). Many such smaller,

individuated communities can spring from a robust network. CoPs are also self-organized. People share a common work and realize there is great benefit to being in relationship. They use this community to share what they know, to support one another, and to intentionally create new knowledge for their field of practice. These CoPs differ from networks in significant ways. They are **communities**, which means that people make a commitment to be there for each other; they participate not only for their own needs, but to serve the needs of others.



In a community of practice, the focus extends beyond the needs of the group. There is an intentional commitment to advance the field of practice, and to share those discoveries with a wider audience. They make their resources and knowledge available to anyone, especially those doing related work.

The speed with which people learn and grow in a community of practice is noteworthy. Good ideas move rapidly amongst members. New knowledge and practices are implemented quickly. The speed at which knowledge development and exchange happens is crucial, because local regions and the world need this knowledge and wisdom now.

Stage Three: Systems of Influence.

The third stage in emergence can never be predicted. It is the sudden appearance of a system that has real power and influence. Pioneering efforts that hovered at the periphery suddenly become the norm. The practices developed by courageous communities become the accepted standard. People no longer hesitate about adopting these approaches and methods and they learn them easily. Policy and funding debates now include the perspectives and experiences of these pioneers. They become leaders in the field and are acknowledged as the wisdom keepers for their particular issue. And critics who said it could never be done suddenly become chief supporters (often saying they knew it all along.)



Emergence is the fundamental scientific explanation for how local changes can materialize as global systems of influence. As a change theory, it offers methods and practices to accomplish the systems-wide changes that are so needed at this time. As leaders and communities of concerned people, we need to intentionally work with emergence so that our efforts will result in a truly hopeful future. No matter what other change strategies we have learned or favored, emergence is the only way change really happens on this planet. And that is very good news.

Appendix

Berkana's Four Stages for Developing Leadership-in-Community

Berkana works with pioneering leaders and communities using a four-stage approach. This has evolved out of our understanding of how living systems grow and change, and years of practice and experimentation.

I. Name

Pioneering leaders act in isolation, unaware that their work has broader value. They are too busy to think about extending their work, and too humble to think that others would benefit. Berkana's first act is to recognize them as pioneers with experiences that are of value to others.

II. Connect

Life grows and changes through the strength of its connections and relationships. (In nature, if a system lacks health, the solution is to connect it to more of itself.) Berkana creates connections in many different ways. We design and facilitate community gatherings. We host networks where people can exchange ideas and resources. Our collaborative technology supports communities of practice through dedicated websites, online conferences, asynchronous conversations and co-created knowledge products.

III. Nourish

Communities of practice need many different resources: ideas, mentors, processes, technology, equipment, money. Each is important, but foremost among these is learning and knowledge: knowing what techniques and processes work well, and learning from experience as people do the work.

Berkana provides many of these sources of nourishment but, increasingly, we find that the most significant nourishment comes from the interactions and exchanges among pioneering leaders themselves. They need and want to share their practices, experiences and dreams. Creating opportunities for people to learn together has become our primary way of nourishing their efforts.

IV. Illuminate

It is difficult for anybody to see work based on a different paradigm. If people do notice such work, it is often characterized as inspiring deviations from the norm. It takes time and attention for people to see different approaches for what they are: examples of what the new world could be. The Berkana community publishes articles, tells our stories at conferences, and host learning journeys where people visit pioneering efforts, learn from them directly, and develop lasting relationships.

World Café to Go

2002 Whole Systems Associates, World Café Community

Conducting an exciting Café Conversation is not hard – it's limited only by your imagination! The Café format is flexible and adapts to many different circumstances. When these guidelines are used *in combination*, they foster collaborative dialogue, active engagement and constructive possibilities for action.

Clarify the Purpose

Pay attention early to the reason you are bringing people together. Knowing the purpose of your meeting enables you to consider which participants need to be there and what parameters are important to achieve your purpose.

Create a Hospitable Space

Café hosts around the world emphasize the power and importance of creating a hospitable space – one that feels safe and inviting. When people feel comfortable to be themselves, they do their most creative thinking, speaking, and listening. In particular, consider how your **invitation** and your **physical set-up** contribute to creating a welcoming **atmosphere**.

Explore Questions That Matter

Finding and framing *questions that matter* to those who are participating in your Café is an area where thought and attention can produce profound results. Your Café may only explore a single question, or several questions may be developed to support a logical progression of discovery throughout several rounds of dialogue. In many cases, Café conversations are as much about discovering and exploring powerful questions as they are about finding effective solutions.

Encourage Everyone's Contribution

As leaders we are increasingly aware of the importance of participation, but most people don't only want to participate, they want to actively contribute to making a difference. It is important to encourage everyone in your meeting to contribute their ideas and perspective, while also allowing anyone who wants to participate by simply listening to do so.

Connect Diverse Perspectives

The opportunity to move between tables, meet new people, actively contribute your thinking, and link the essence of your discoveries to ever-widening circles of thought is one of the distinguishing characteristics of the Café. As participants carry key ideas or themes to new tables, they exchange perspectives, greatly enriching the possibility for surprising new insights.

Listen for Insights and Share Discoveries

Through practicing shared listening and paying attention to themes, patterns and insights, we begin to sense a connection to the larger whole. After several rounds of conversation, it is helpful to engage in a **whole group conversation**. This offers the entire group an opportunity to connect the overall themes or questions that are now present.

Café Conversations at a Glance

- Seat **four or five people at small Café-style tables** or in conversation clusters.
- Set up **progressive** (usually three) **rounds of conversation** of approximately 20-30 minutes each.
- **Questions or issues that genuinely matter** to your life work or community are engaged while other small groups explore similar questions at nearby tables.
- Encourage both table hosts and members to **write, doodle and draw key ideas** on their tablecloths or to note key ideas on large index cards or placemats in the centre of the group.
- Upon completing the initial round of conversation, ask one person to remain at the table as the “host” **while the others serve as travelers or “ambassadors of meaning”**. The travelers carry key ideas, themes and question into their new conversations.
- Ask the table host to welcome the new guests and briefly share the main ideas, themes and questions of the initial conversation. Encourage guests to **link and connect ideas** coming from their previous table conversations – listening carefully and building on each other’s contributions.
- By providing opportunities for people to move in several rounds of conversation, **ideas, questions, themes begin to link and connect**. At the end of the second round, all of the tables or conversation clusters in the room will be *cross-pollinated* with insights from prior conversations.
- In the third round of conversation, people can return to their home (original) tables to **synthesize their discoveries**, or they may continue traveling to new tables, leaving the same or a new host at the table. Sometimes a new question that helps **deepen the exploration** is posed for the third round of conversations.
- After several rounds of conversation, initiate a period of sharing discoveries and insights in a **whole group conversation**. It is in these town meeting-style conversations that

patterns can be identified, collective knowledge grows, and possibilities for action emerge.

Once you know what you want to achieve and the amount of time you have to work with, you can decide the appropriate number and length of conversation rounds, the most effective use of questions and the most interesting ways to connect and cross-pollinate ideas.

Café Etiquette

Focus on what matters.

Contribute your thinking.

Speak your mind and heart.

Listen to understand.

Link and connect ideas.

Listen together for insights and deeper questions.

Play, Doodle, Draw – writing on the tablecloths is encouraged.

Have fun!

The Importance of Café Question(s)

The question(s) you choose or that participants discover during a Café conversation are critical to its success. Your Café may explore a single question or several questions may be developed to support a logical progression of discovery throughout several rounds of dialogue.

Keep in mind that...

- Well-crafted questions attract *energy* and focus our *attention* to what really counts. Experienced Café hosts recommend posing open-ended questions – the kind that don't have yes or no answers.
- Good questions need not imply immediate action steps or problem solving. They should invite inquiry and discovery vs. advocacy and advantage.
- You'll know you have a good question when it continues to surface new ideas and possibilities.
- Bounce possible questions off of key people who will be participating to see if they sustain interest and energy.

A Powerful Question

- Is simple and clear.
- Is thought provoking.
- Generates energy.
- Focuses inquiry.
- Surfaces unconscious assumptions.

- Opens new possibilities.

5 Ways to Make Collective Knowledge Visible

1. Use a Graphic Recorder

In some Café events the whole group conversation is captured by a graphic recorder who draws the group's ideas on flip charts or a wall mural using text and graphics to illustrate the patterns of the conversation.

2. Take a Gallery Tour

At times, people will place the paper from their tables on the wall so members can take a tour of the group's ideas during a break.

3. Post your Insights

Participants can place large Post-Its with a single key insight on each blackboard, wall, etc., so that everyone can review the ideas during a break.

4. Create Idea Clusters

Group insights from the Post-Its into "affinity clusters" so that related ideas are visible and available for planning the group's next steps.

5. Make a Story

Some Cafes create a newspaper or storybook to bring the results of their work to larger audience after the event. A visual recorder can create a picture book along with text as documentation.

How to Create a Café Ambiance

Whether you are convening several dozen or several hundred people, it is essential to create an environment that evokes a feeling of both informality and intimacy. When your guests arrive they should know immediately that this is no *ordinary* meeting.

- If possible, select a space with natural light and an outdoor view to create a more welcoming atmosphere.
- Make the space look like an actual Café, with small tables that seat four or five people. Less than four at a table may not provide enough diversity of perspective, more than five limits the amount of personal interaction.
- Arrange the Café tables in a staggered, random fashion rather than in neat rows. Tables in a sidewalk Café after it has been open for a few hours look relaxed and inviting.
- Use colorful tablecloths and a small vase of flowers on each table. If the venue allows it add a candle to each table. Place plants or greenery around the room.

- Place at least two large sheets of paper over each tablecloth along with a mug or wineglass filled with colorful markers. Paper and pens encourage scribbling, drawing, and connecting ideas. In this way people will jot down ideas as they emerge.
- Put on additional Café table in the front of the room for the Host's and any presenter's material.
- Consider displaying art or adding posters to the walls (as simple as flip chart sheets with quotes), and play music as people arrive and you welcome them.
- To honor the tradition of community and hospitality provide beverages and snacks. A Café isn't complete without food and refreshments!

**Use your imagination!
Be creative!**

Café Supplies

- Small round tables of 36 to 42 inches are ideal, but small card tables will also work.
- Enough chairs for all participants and presenters.
- Colorful tablecloths.
- Flipchart paper or paper placemats for covering the Café tables.
- Colored water-based markers (so they don't bleed, Crayola and Mr. Sketch work well). For legibility use dark colors such as green, black, blue and purple. Add on or two bright colors to the cup (red, light green, light blue or orange) for adding emphasis.
- A vase with cut flowers, a mug or wineglass per table for markers.
- A side table for refreshments and snacks.
- Mural (6' long x 48" tall) or flip chart paper for making collective knowledge visible and tape for hanging.
- Flat wall space (minimum of 12') or two rolling white boards (4'x6' each)
- Additional wall (or window) space for posting collective work and/or the work of the tables.

Optional (depending on size and purpose)

- Overhead projector and screen.

- Sound system for tapes and/or CDs.
- A selection of background music.
- Wireless lavalieres for Café Hosts, and handheld wireless microphones for town meeting-style sessions.
- Easels and flipcharts.
- Basic supplies including stapler, paper clips, rubber bands, markers, masking tape, pens, push pins and pencils.
- Colored 4x6 inch or 5x8 inch cards (for personal note taking).
- 4.6 inch large Post-Its in bright colors for posting of ideas.

I'm the Café Host, What do I do?

The job of the Café host is to see that the six guidelines for dialogue and engagement are put into action. It is not the specific form, but living the spirit of the guidelines that counts. Hosting a Café requires thoughtfulness, artistry and care. The Café Host can make the difference between an interesting conversation and breakthrough thinking.

- Work with the planning team to determine the purpose of the Café and decide who should be invited to the gathering.
- Name your Café in a way appropriate to its purpose, for example: Leadership Café; Knowledge Café, Strategy Café; Discovery Café, etc.
- Help frame the invitation.
- Work with others to create a comfortable Café environment.
- Welcome the participants as they enter.
- Explain the purpose of the gathering.
- Post the question or themes for rounds of conversation and make sure that the question is visible to everyone on the overhead, flip chart or on cards at each table.
- Explain Café guidelines and Café Etiquette and post them on an overhead, an easel sheet or on cards at each table.

- Explain how the logistics of the Café will work, including the role of the Table Host (the person who will volunteer to remain at the end of the first round and welcome newcomers to their table).
- During the conversation, move among tables.
- Encourage everyone to participate.
- Remind people to note key ideas, doodle and draw.
- Let people know in a gentle way when its time to move and begin a new round of conversation.
- Make sure key insights are recorded visually or are gathered and posted if possible.
- Be creative in adapting the six Café guidelines to meet the unique needs of your situation.

I'm a Table Host, What Do I Do?

- Remind people at your table to jot down key connections, ideas, discoveries, and deeper questions as they emerge.
- Remain at the table when others leave and welcome travelers from other tables.
- Briefly share key insights from the prior conversation so others can link and build using ideas from their respective tables.

What are Café Conversations?

Café Conversations are an easy-to-use method for *creating* a living network of collaborative dialogue around questions that matter in service of the real work. Cafés in business have been named in many ways to meet specific goals, including Creative Cafés, Knowledge Cafés, Strategy Cafés, Leadership Cafés, Marketing Cafés, and Product Development Cafés. Most Café conversations are based on the principles and format developed by The World Café (see www.theworldcafe.com), a growing global movement to support conversations that matter in corporate, government and community settings around the world.

Café Conversations are also a provocative *metaphor* enabling us to see new ways to make a difference in our lives and work. The power of conversation is so invisible and natural that we usually overlook it. For example, consider all the learning and action choices that occur as people move from one conversation to another both inside the organization and outside, with suppliers, customers and others in the larger community. What if we considered all of these conversations as one big dynamic Café, with each of job function as a table in a larger network of living conversations, which is the core process for sharing our collective

knowledge and shaping our future? Once we become aware of the power of conversation as a key business process, we can use it more effectively for our mutual benefit.

The Café is built on the assumption that people already have within them the wisdom and creativity to confront even the most difficult challenges. Given the appropriate context and focus, it is possible to access and use this deeper knowledge about what's important.

What is essential about the Café method? We have outlined a series of guidelines for putting conversation to work through dialogue and engagement. If you put these guidelines to work when planning your meetings, you'll be surprised at the improved quality of the outcomes you get. When hosting a Café Conversation using *all* these guidelines *simultaneously* you'll find you are able to create a unique Café environment where surprising and useful outcomes are likely to occur.

Open Space Technology Overview

What is an Open Space Technology meeting?

Open Space Technology has been defined as:

- A simple, powerful way to catalyze effective working conversations and truly inviting organizations – to thrive in times of swirling change.
- A methodological tool that enables self-organizing groups of all sizes to deal with hugely complex issues in a very short period of time.
- A powerful group process that supports positive transformation in organizations, increases productivity, inspires creative solutions, improves communication and enhances collaboration.
- The most effective process for organizations and communities to identify critical issues, voice to their passions and concerns, learn from each other, and, when appropriate, take collective responsibility for finding solutions.

The goal of an Open Space Technology meeting is to create time and space for people to engage deeply and creatively around issues of concern to them. The agenda is set by people with the power and desire to see it through, and typically, Open Space meetings result in transformative experiences for the individuals and groups involved.

What is Open Space Technology best used for?

Open Space Technology is useful in almost any context including strategic direction setting, envisioning the future, policy making, conflict resolution, morale building, consultation with stakeholders, community planning, collaboration and deep learning about issues and perspectives.

When is Open Space Technology the best meeting format to use?

Any situation in which there is:

- A real issue of concern.
- Diversity of players.
- Complexity of elements.
- Presence of passion (including conflict).
- A need for a quick decision.

Open Space will work under all of these circumstances. It is only inappropriate when the outcome of the meeting is predetermined or if sponsors are not prepared to change as a result of the meeting.

What outcomes can I expect from an Open Space Technology Meeting?

Open Space Technology meetings can produce the following deliverables:

- Every single issue that anybody cares about enough to raise will be “on the table”.
- All issues will receive as much discussion as people care to give them.
- All discussion will be captured in a book, and made available to the participants.
- All issues will be prioritized.
- Related issues will be converged.
- Responsibility will be taken for next step actions.

In meetings of one and a half or two and a half days duration, all of these deliverables will be achieved with deep conversation and commitment to action. Meetings of a shorter duration will have many of these positive effects, but typically in meetings of a day or less, there is more emphasis on conversation and less on action.

How does an Open Space Technology meeting work?

Open Space operates under four principles and one law. The four principles are:

1. Whoever comes are the right people.
2. Whatever happens is the only thing that could have happened.
3. When it starts is the right time.
4. When it's over it's over.

The Law is known as the Law of Two Feet:

"If you find yourself in a situation where you are not contributing or learning, move somewhere where you can."

The four principles and the law work to create a powerful event motivated by the passion and bounded by the responsibility of the participants.

What does Open Space look like?

A meeting room prepared for Open Space has a circle of chairs in the middle, letters or numbers around the room to indicate meeting locations, a blank wall that will become the agenda and a news wall for recording and posting the results of the dialogue sessions.

Essentially an Open Space meeting proceeds along the following process:

1. Group convenes in a circle and is welcomed by the sponsor. The facilitator provides an overview of the process and explains how it works.
2. Facilitator invites people with issues of concern to come into the circle, write the issue on a piece of quarter size flip chart paper and announce it to the group. These people are “conveners”.
3. The convener places their paper on the wall and chooses a time and a place to meet. This process continues until there are no more agenda items.
4. The group then breaks up and heads to the agenda wall, by now covered with a variety of sessions. Participants take note of the time and place for sessions they want to be involved in.
5. Dialogue sessions convene for the balance of the meeting. Recorders determined by each group capture the important points and post the reports on the news wall. All of these reports will be rolled into one document by the end of the meeting.
6. Following a closing or a break, the group might move into convergence, a process that takes the issues that have been discussed and attaches action plans to them to “get them out of the room”.
7. The group then finishes the meeting with a closing circle where people are invited to share comments, insights, and commitments arising from the process.

An Open Space Scenario

Open Space is a powerful way to get people working FAST. In 2.5 days, this is what usually happens...

Opening...people sitting in a circle, many of whom who have never sat in a circle, so this is a little strange, but there is a sense of anticipation, and certainly as the sponsor begins to introduce things and the facilitator begins to walk around the inside of the circle people are challenged to make something new. The level of excitement rises.

Agenda setting...folks create an agenda that uses the whole facility as a meeting space, that centres on small invitations to convene intimate dialogue sessions, or that asks questions of the assembled masses, to attract expertise to a topic, to figure out how to move things forward.

The Marketplace...the agenda items are out, the invitations have been issued and one wall of our meeting room is covered with topics, arranged by time and place. We have an agenda. People are invited to go to the wall, mill around, decide what to attend, which discussions to contribute to, which opportunities to learn from. It's chaotic and loud, but people are beginning to sink their teeth into what's on offer.

Day One dialogue...it starts slowly but warmly. Small groups gather. People meet each other, toss ideas out, poke around the edges of assumptions, find natural allies. Conversations convene and disperse, and notes are entered into laptops and collated into a real time book of proceedings. If we are posting online and there are people out in cyberspace, they will begin to pick up the thread of the conversations there, and extend them in asynchronous time.

Day One Evening...people are tired, but charged up. There is inspiration in the room and the dialogue is humming out on the Net. There is a sense of possibility that something really interesting might be happening. The anxiety from the morning is gone, replaced by curiosity and an emerging sense that things are changing. Evening news features some feedback but also dinner plans, hopes for the next day, thanks yous and challenges.

Day Two...a few more topics are proposed in the morning news session, some overnight dreams and insights are shared but then people quickly get down to work. Dialogue deepens quickly and people are surprised by how projects begin to take shape, how assumptions shift and new connections are made at deep and powerful levels.

Day Two evening...tired again and hopeful that something concrete can come of it all. Looking forward to bed. Net still humming with activity, book of proceedings is printed out, with discussion from online added to it, and copies are made for everyone.

Day Three...facilitator introduces this day as focusing on action planning. Thick books of proceedings are sitting in the middle of the circle. You have done this. You have produced these 150 pages of conversations, notes, sketches of the future. Today is the day to get it out of the room. To let passion guide your direction and use your responsibilities and abilities to attract the resources we need to make it happen.

People go away for an hour and read the book and consider their responses to it. What patterns do I see? Which projects beg to be undertaken? What can I do? What WILL I do? It's quiet and introspective. Small hushed conversations may begin but mostly people are really asking themselves what they are now capable of doing.

We open the space again and this time we invite action. We invite projects to come forward and we invite people to work on them and create the commitments that take them out of the conference setting and back to the real world. There is no more time to rehash the issues...the time to implement is now.

Action groups meet, convening around the tasks that people volunteer to champion. Conversations are recorded and the invitation is put back on the net to attract others to the projects. People come back into the closing circle to report on their work and are surprised and delighted at how deep and how easy it has been to initiate change. A closing circle ends the ritual and people say their farewells.

After the conference, the work BEGINS. Now we have to find ways to continue to connect people and support the projects that have started. We provide them with places and methods to communicate...blogs, wikis, conference calls, meeting spaces, follow ups in OpenSpace OnLine. People leave with a job to do, self-designed, self-assigned, supported by the sponsor of the meeting and assisted by workgroups both large and small.

Further resources

Open Space Technology: A User's Guide by Harrison Owen. This is "the book" on how to conduct Open Space Technology meetings. It is available in large bookstores. If you can't find the book, you can download an older version of the guide for free from Harrison Owen's website at http://www.openspaceworld.com/users_guide.htm.

Open Space Technology: A User's NON-Guide edited by Michael Herman and Chris Corrigan. This book is a deep dialogue between 37 leading practitioners of Open Space Technology on a wide range of underlying principles that inform Open Space Technology. You can download the book for free here:
<http://www.globalchicago.net/wiki/wiki.cgi?OpenSpaceTech/UsersNonGuide>.

Inviting Organization: evolution is now and open space by Michael Herman. This book forms the backbone of the material covered in the practice workshop. It is available for free at:
<http://www.globalchicago.net/ost/invitingorg/index.html>.

Tales From Open Space by Harrison Owen. This was first ever collection of Open Space Technology stories and case studies. The original book is out of print, but again, you can download it for free at <http://www.openspaceworld.com/tales.htm>.

Open Space Technology Notes by Michael Lindfield. This is an extensive paper, written following a training Lindfield did with Harrison Owen in 1994. It works well as a compliment to the User's Guide and contains much practical information about facilitating Open Space Technology and working with the grief cycle.
<http://www.openspaceworld.org/tmnfiles/lindfield.htm>

For further inquiry, reading lists relating to Open Space Technology can be found at the worldwide Open Space website at:

<http://www.openspaceworld.org/wiki/wiki/wiki.cgi?RecommendedBooks>

Ongoing Support

If you choose to learn more about Open Space Technology, I invite you to become a member of the world wide community of Open Space practitioners. There are a number of websites, email lists and other resources out there for you. Here are some of the best:

OSLIST is the international Open Space Technology practitioner email list. This is an incredibly supportive community of 350 or so practitioners from all over the world who are always eager to answer questions and play with ideas. You can subscribe to the list at:

<http://listserv.boisestate.edu/archives/oslist.html>

World Wide Open Space is the central online resource for Open Space Technology practitioners. It is located at <http://www.openspaceworld.org>

Open Space World Network is a wiki web which you can use for free to host proceedings, make notes or use in support of Open Space Technology meetings you are facilitating. <http://www.openspaceworld.net>

Michael Herman's Open Space Resources. Michael's own collection of resources can be found at <http://www.globalchicago.net/wiki/wiki.cgi?OpenSpaceTech>

Chris Corrigan's Open Space pages. My own website has a number of resources and an Open Space weblog updated several times a week with articles, quotes and other online findings of interest to Open Space Technology practitioners. It's at <http://www.chriscorrigan.com/openspace>

Finally, if you ever need to contact me, please call (604) 947-9236 or email at chris@chriscorrigan.com

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