

# Question Guide to Accompany

## Core Theory of Success



**“Core Theory of Success”** from:

Daniel Kim, *Organizing for Learning*. Waltham, MA: Pegasus Communications, 2001, p. 87.

Model illustration from *It Begins Here: Organizational Learning Journey Toolkit*. Compiled and designed by W.K. Kellogg Foundation in collaboration with Daniel H. Kim and Diane Cory. Copyright 2006, Daniel H. Kim. Available from Cobee Trading Company in Singapore, [www.cobee.com.sg](http://www.cobee.com.sg).

**Question guide** developed by Kathleen A. Zurcher. For more information contact her at [kzurcher33@gmail.com](mailto:kzurcher33@gmail.com).

## **This Guide**

The purpose of this guide is to provide a partial list of questions that can help groups apply the Core Theory of Success to their work, from planning to sustaining results. At different points in the evolution of your group and its work, different questions will be appropriate.

### **The Model, from *Organizing for Learning*:**

“...as the *quality of relationships* among people who work together increases (high team spirit, mutual respect, and trust), the *quality of thinking* improves (people consider more facets of an issue and share a greater number of different perspectives). When the level of thinking is heightened, the *quality of actions* is likely to improve (better planning, greater coordination, and higher commitment). In turn, the *quality of results* increases as well. Achieving high quality results as a team generally has a positive effect on the *quality of relationships*, thus creating a virtuous cycle of better and better results.

### **Quality of Relationships**

- What is the quality of relationships among people on our team or in our community that would facilitate collaborating to create our preferred future?
- What is the quality of relationships diverse team/community members need to think and work together effectively?
- What quality of relationships will allow people to honestly express their own perspectives and to hear those of others?
- Who needs to be in relationship with one another in order to create lasting change in the community?
- Who has typically been excluded from conversations and leadership roles in this issue? How can we engage them respectfully now?
- What is the quality of relationship we want among youth and adults engaged together as partners?
- As we convene the group, what practices will we use to build the quality of relationships? What intentional practices will we use for:
  - making the first contact
  - extending an invitation
  - setting the room environment
  - helping people get to know one another in the context of their mutual work on this issue
  - modeling the kind of relationships we hope to establish among the members of the group
  - continuously building and maintaining relationships
  - communicating before, during, and after each conversation or work session
- What will be the effects on the quality of relationships of the time and place we choose to meet? Consider effects of:
  - Geographic location

- Quality of the space—comfort and flexibility of seating, lighting, sound, cleanliness, accessibility for all ages and abilities, availability of needed equipment, work space for the group and small groups, access to support services ( for example, rest rooms, refreshments, copying, parking, public transportation), safety for all group members.
- Owner of the space—Who may be more likely or less likely to participate due to space being owned by a particular organization?
- Time of day set for meetings—Who may be more likely or less likely to participate due to the time of meetings? What groups are being systematically included or excluded depending on the time?
- What temporary enhancements can we make to the meeting space that will enhance the quality of relationships?
- What will we do to sustain the quality of relationships throughout the life of this work, and beyond?
  - What communication strategies will we employ?
  - What will we do to maintain the quality of relationships during transitions in group membership? How will we recognize the departure of members? How will we orient and bring new partners into the group in ways that are effective for them, build new relationships effectively, and maintain relationships among group members?
- How will we assess whether we have built and sustained high quality relationships?
  - What indicators and patterns will we assess over time? How do we expect those patterns to change? How will we collect the information we need for the group to decide whether they need to take additional steps to build their quality of relationships?
  - At what intervals will the group step back and assess their quality of relationships?
  - How will we mark milestones in the relationships?

### **Quality of Collective Thinking**

- What is the quality of collective thinking we need in order to create the most effective plan for our team/community?
- What questions will engage members in the thinking that we need at this time?
- What question, if asked of this group, would profoundly change the nature of the conversation and collective thinking?
- What questions will reveal areas of agreement or beliefs, assumptions, and ideas (mental models) we hold in common?
- What questions will reveal areas where we have divergent beliefs, assumptions, and ideas (mental models)?
- What questions will move us to consider the “root of the root” of the issues we are addressing?

- What tools and approaches can we employ to assure that diverse voices and a wide range of perspective are heard? Consider:
  - Establishing group guidelines for participation that incorporate multiple cultural practices and are appropriate for all ages
  - Designing work sessions based on systems thinking tools (for example, Hierarchy of Choices, Levels of Perspective/Vision Deployment Matrix, creating Key Success Loops/causal loop diagrams)
  - Structuring conversations using a variety of methods (for example, World Café, Generative Dialogue, Appreciative Inquiry, Open Space, U-Process)
- What approaches will we use for our plan (for example, Community Action Plan; visual representations; physical models)?
- Who is the most appropriate person to facilitate conversations so that all members can participate fully?
  - When do we need a skilled facilitator who is not a member of the group? What knowledge and skills do we want that person to have?
  - When can we facilitate our own conversations?
  - What are the intended and unintended consequences of having one of the group members facilitate the conversation? Of having someone outside the group facilitate?
- What are the pressures that the group might feel to move from thinking to action too quickly? What questions will we use to help refocus our attention on collective thinking?
- What questions can help to move the group from a reactive mindset to a creative one?
- What questions will keep the group focused on the future they want to create?
- What questions will elicit an assessment of the positive and negative aspects of current reality, but without putting the group in a reactive mindset?
- What room set-up will we use to enhance our ability to think together collectively?
- What will we do to create a hospitable and productive room environment in service of collective thinking? Consider:
  - Arranging chairs to enhance all participants seeing one another
  - Positioning seating in the room in order to change the shape of the useable space (e.g., using one end of a long-narrow room in order to create a circle, rather than a slender oval)
  - Using flipcharts, markers, and wall space to draw and post ideas, represent our thinking, and to invite all participants to add to the work
  - Bringing color, light, artwork, objects that can be manipulated, snacks, etc. into the room to build energy and creativity
  - Having an appropriate temperature in the room

- Having materials available and organized for participants, including paper, pens, and other supply items
- How will we document and communicate our collective thinking, for ourselves and others?
  - What will we do to document the collective thinking of the group? During the conversation? As a record of our thinking, agreements, and plans?
  - How will members of the group have access to the record?
  - What will be communicated outside of the group? For what purpose? In what form? When?

### **Quality of Collective Actions**

- What is the vision we want to achieve together?
- What are our strategies and tactics for achieving our vision?
- What are the relationships between each proposed action and our strategies and tactics?
- What might be the unintended consequences of proposed actions?
- What actions can be taken by individuals and organizations separately, and what needs to be done collectively?
- What process will we use to decide who has which responsibilities and what kind of authority?
- How are we accountable to one another?
- How will we communicate with one another about actions, timelines, resources, and outcomes?
- What is our plan for assessing the effectiveness of our actions?
  - Each action or activity?
  - The effects of one action/activity on the whole?
- How will we identify gaps between achieving our vision and the cumulative effects of actions as we implement them?
  - What milestones will we monitor?
  - What is our process of making adjustments in strategies and modifying action plans?
- What opportunities continue to emerge?
  - Which opportunities are in alignment with our vision and strategies?
  - Who will decide which to pursue and what is the process for deciding?
  - What are the costs of pursuing the opportunity? What are the costs of not pursuing it?

### **Quality of Results**

- What indicators will help us assess whether we are moving toward our vision?
- What has been the past patterns-over-time of these indicators? What are the patterns-over-time we would expect to see as we move toward our vision? How will they change?

- What capacities have we developed that will sustain this work and enhance other work?
- What have we learned so far that can inform and improve future work?
  - What worked well this time?
  - What didn't work as well this time?
  - What would we do differently next time? What results would we expect by doing this differently?
- What are our successes?
  - What relationships have contributed to our success?
  - What resources have been developed and what resources have we used to achieve these successes?
- What have we learned about our theory of change?
  - Where have we adapted it? With what results?
- What advice would we give to others who are pursuing work such as ours?

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