Don't Just Do Something, Sit There.

Helping Others Become More Strategic, Conceptual, and Creative: A Cooperative Inquiry

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About this project

In early 2003, as part of a participatory action research designed by the Research and Documentation component of the Leadership for a Changing World (LCW) program at the Research Center for Leadership in Action at NYU, a group of community organizers, along with two facilitators from academia, engaged in a systematic process of cooperative inquiry, exploring a question first proposed by Larry Ferlazzo: "How we can teach people to be more strategic, conceptual, and creative in their thinking?" Cooperative inquiry (CI) is a process of repeated episodes of action and reflection through which a group of peers strives to answer a question of compelling interest to them. We engaged in six cycles of reflection and action.

Our group began forming in late fall of 2002 during an LCW program meeting. The group's members included three LCW awardees: Larry, formerly with the Sacramento Valley Organizing Community; Vicky Kovari, from the Metropolitan Organizing Strategy Enabling Strength; and Reverend Tyrone Hicks, Senior Pastor of Parks Chapel African Methodist Episcopal Church; along with two additional participants whom Larry suggested: Mary Ochs, from the Center for Community Change; and Craig McGarvey, an independent consultant. The three awardees are experienced community organizers (Larry changed jobs during the inquiry, accepting a position working with emotionally challenged students in a middle school), as is Mary, who works with community organization facilitators and leaders. Craig is experienced in working with organizers, both as a foundation officer and as a consultant to foundations. The group was facilitated by Lyle Yorks, a member of the faculty of Teachers College, Columbia University, and an experienced CI participant and facilitator, and Lucia Alcántara, a Doctoral Candidate at Teachers College, who is also experienced in CI.

How our inquiry unfolded

After an initial pre-meeting to discuss Larry's proposed question, we met several more times, generally for a day and half. Early in our inquiry process, we invited outsiders to be part of our meetings in order to gain other perspectives on our question. During the latter part of the inquiry, we learned from each other, drawing on the experiences from the actions we were taking.

- At our first full meeting, in August 2003, we spent time getting familiar with one another, thinking about the strategic learning process, sharing stories relevant to our inquiry question, and reflecting on possible implications for our practice.
- During our second and third meetings, we continued sharing stories, talking about our practices, and reflecting on the perspectives provided by invited outsiders.
- By the fourth and fifth meetings, we were taking actions and learning from each other's experiences.
- The sixth, seventh, and eighth meetings focused on making sense of our learning and producing products for sharing this learning with others. This activity deepened our own learning.

The publication that follows was developed from this iterative, CI process. For more information about the Research and Documentation Component of the LCW program and the Research Center for Leadership in Action at NYU, please see the inside back cover. For a more complete report on our inquiry, see www.nyu.edu/wagner/leadership. For more information on conducting a cooperative inquiry, you can refer to J. Bray, J. Lee, L. Smith, & L. Yorks. *Collaborative Inquiry in Practice: Action Reflection and Meaning Making*. Sage Publications, 2000.

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We knew we were becoming stale.

"Organizers are always talking about going broader and deeper, and we are missing that—we turn out the numbers at actions, but we are not going broader and deeper. We don't develop people, and if a key person is missing during an event, it's a problem. We need to develop an expanded core of leadership." *–Tyrone Hicks*

Community organizers bring people together to act collectively by exercising their power to develop voice in public decisions affecting their quality of life. Our group (see "About this project" on the inside front cover) came together with a shared sense of concern that organizing actions alone was not enough to sustain our organizations. While we had been effective in achieving many community goals, we also agreed that our leadership core was often not growing, or not growing enough. We knew we were becoming stale. We began exploring the question, "How can we teach people to be more strategic, conceptual, and creative in their thinking?" Larry Ferlazzo, at the time with the Sacramento Valley Organizing Community, proposed this question in the fall of 2002 as part of the Leadership for a Changing World (LCW) program (see inside back cover), and through conversations with each of us, drew us into the inquiry.

In explaining what motivated him to pose the question, Larry shared a conversation he had had some time ago with another organizer who, in discussing some top leaders in the IAF (Industrial Areas Foundation), commented how "one organizer had taught me the skills of organizing, but another had taught me how to think." That insight—the difference between skill and thinking—had stayed with him. Because Larry was weighing the idea of transitioning to teaching, he was in a more reflective space than in years past when he was focused on task. "I was thinking about how I might help students learn to think, which is at the heart of democracy," he said. "This [cooperative inquiry] process might help me to look at the shortcomings in both organizing and teaching. I was really prepared to reflect on how organizers work."

Our conversations and subsequent actions in the inquiry were provocative and educative. They challenged our assumptions about organizing. Early in the inquiry, we were struck by the realization that in our work things seemed out of balance. In the words of Vicky Kovari of Metropolitan Organizing Strategy Enabling Strength, "Organizers can be action junkies, and often avoid deep reflection with others on our actions." As an example, Vicky noted "how stale and rote our evaluations have become, generating the same non-reflective comments over and over again."

We concluded that strategic, conceptual, and creative thinking is developed through processes of inquiry that engage the learner. Importantly, we had to be engaged in the inquiry process itself.

We began to consider a different view of the purpose evaluation serves in our organizations. We came to understand the difference between training people to implement an action and developing their ability to think like creative and strategic leaders. We concluded that strategic, conceptual, and creative thinking is best developed through processes of inquiry that engage the learner. Importantly, we had to be engaged in the inquiry process itself. Only through repeated cycles of action and reflection can people develop their capacity to think creatively, conceptually, and strategically. This is a different approach from the typical skills training that we do in support of our organizing efforts.

Using the tools of inquiry

"Most organizers think that these kinds of reflective tools are at best a luxury and at worst an excuse not to take any action. They are perceived as taking time away from the real business of organizing, which is planning actions."—Vicky Kovari

What follows are snapshots that illustrate how we developed our insights around facilitating strategic, conceptual, and creative thinking, and in some cases, put them into practice. We began to experiment with various adult education tools and practices such as storytelling, "the learning window," and using metaphors in working with our organizations. Our purpose throughout was to share our learning and provoke further debate and dialogue about the connections between inquiry, education, and organizing. We did this through a series of reflective stories.

A chorus of no's

In 2004 the Center for Community Change (CCC), a national organization providing support to local community groups in order to strengthen the field of organizing, convened its first training of national leaders from around the country for a voter registration campaign focused on the presidential elections. Mary Ochs, CCC's National Field Director, wanted to use storytelling as an icebreaker at the campaign's initial gathering. When Mary consulted with her colleagues about the use of storytelling, she met with a chorus of resistance.

> ***I said I was going to ask people to tell a story about their personal history or their family's history with voting. My colleagues said no, no, nobody will have anything to say. We have too much to do. It will take too long. I decided to try it anyway.***
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> ***I was sweating it. The first story was from a young woman named Amber, who said, "I voted for the first time in the 2000 presidential election. Later that evening, while watching the election returns on the news, I realized in a very real way how important every vote is. The presidential race in my state [New Mexico] was very close. As I watched the news, I saw the color coding from New Mexico changing back and forth from red to blue, blue to red every few minutes as new returns came in. The presidential election was so close in New Mexico and many other states. I am now telling this story to people that I register to vote."***
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> ***All of the stories were absolutely amazing. Everyone saw the point of the exercise. Their stories grounded us, not only in what we were going to talk about, but also at the deeper purpose. Collectively, the stories were a microcosm of the types of values, experiences, and barriers we would encounter when doing voter work. By putting out stories, we also learned something about each person. You could feel a different sense in the room after we did it—a shared sense of purpose and shared fate.***

As we later discussed Mary's action, Vicky expressed her own initial resistance to using stories. "What I learned from reflecting on the role of stories," she said, "was that, before this process, I never really understood the power of stories as a learning tool. I would have been right there in that chorus of no's."

Using Stories

Stories are a powerful way of communicating knowledge. They can also be instrumental in getting people to look at issues in new ways. Telling stories engages reflective processes in both the person telling the story and in the listeners. Our group's experience with stories and their power got us into a discussion of what a powerful learning strategy stories are. Returning to our question of how we teach people, we came to realize a contradiction in our original question: the difference between training (where people are just given information, or taught how to do something such as how to register voters) vs. facilitating learning (engaging people to reflect and gain insight from their own and others' experiences). Repeatedly, we found that we were most effective in generating strategic and creative thinking in others when we were venturing onto new ground, experimenting, and trying something new ourselves.

When using stories, it is important to:

- Frame the activity in a way that is relevant to the task at hand and provides for new perspectives;
- Not just share experiences, but help people make connections between different experiences and suggest new approaches;
- Spend time asking probing questions to explore insights gained by both the storyteller and the listeners;
- Maintain a balance between group process and stories in the process of discovery.

Just tell ’em, “It’s one.”

For eighteen years, Larry Ferlazzo had been an organizer, most recently with the Sacramento Valley Organizing Community. During our inquiry, Larry was transitioning from organizing to teaching. We noticed how he was most effective in helping his students be conceptual or creative when he was intentional about creating a new experience, rather than using a prior lesson plan. For example, during his first year of teaching he was doing a unit on density and buoyancy. Larry tells the story:

> ***I decided that a good experiment would be to have the students first determine the density of pieces of wood that were the same in every way except that they would be cut in different lengths. I would then have them determine the density of water through a similar experiment, and then, through the experience of placing the wood in water, they could conclude that objects with less density than water would float. They would do these experiments while working in small groups. Having described what I was doing to some experienced teachers, they all told me, “You are wasting your time. Just tell them the density of water is one.” I did it anyway, and the experiment went great.***

“As organizers, we are often like these experienced teachers,” Larry said. “We feel so task oriented that we don’t take the time to help people learn. We already know exactly how to do the next step, so we train people to do it, rather than creating a ‘lesson plan’ that helps them to discover how to do it.”

Do I know what I think I know?

Vicky Kovari is a lead organizer for MOSES (Metropolitan Organizing Strategy Enabling Strength) in Detroit. For two years MOSES had been in a campaign advocating for regional mass transit. The campaign was stuck and needed new direction. Vicky used a technique called the learning window (see sidebar), which we had discussed at a CI meeting. Reflecting on where to take the campaign, Vicky first asked herself and then her group of leaders to answer three questions: "What do you know you know?" "What do you think you know?" and "What do you know you don't know?"

In trying to answer these questions, she realized that much of the group's process and many of its tactics were based on what they really didn't know. Somehow they had to find strategies that were based on what they actually experienced or knew from talking to people and on data from studies, etc. The group also needed to be more explicit about what risks it was going to take, based on what the members only thought they knew. For example, much of the group's past actions were directed toward the state legislature, which was very hostile to the group and to Detroit in particular. As Vicky tells the story:

> ***We were making certain, invalid assumptions about those legislators, or we were in denial. We just kept thinking we needed to go back to them. Everything we knew about the current legislators meant that going back to the legislature didn't make sense for us—we were not going to win. So we looked at who had at least as much power in the region as legislators and began to look to the courts. We also realized that if we were ever to be successful in getting the public or the legislature to increase funding for public transit, we had to dramatically change the current system, especially in Detroit. The public would not fund a dysfunctional system. So we decided to use the courts as a way to create a bigger crisis within the system and expose the dysfunction of the current transit system with the hope of getting a receiver appointed. We filed a lawsuit against the City of Detroit to take management of the system away from the city. This was a risky move, and like everything else in Detroit, fraught with racial land mines. For a very diverse group of leaders, however, it became clear that we needed to take a new strategic approach, and this one made the most sense.***

Many of the initial campaign's tactics had been based on what they didn't know. Talking through their approach with the learning window, her group came to see that they were basing actions on what they only thought they knew (untested beliefs), rather than what their experience had taught them. After using the learning window, it became clear that the group needed to take a new strategic approach.

The Learning Window

The difference between "What We Know" and "What We Think We Know" is the extent to which facts (from studies, direct experiences, and so forth) support the group's belief. Their willingness to engage in robust testing of their ideas and strategies against facts and experience is at the heart of sound strategic thinking. This process often surfaces additional unknowns that are brought into the strategy.

What We Know	What We Think We Know
What We Know We Don't Know	?

Figure 1: Based on T.A. Stewart, *Intellectual Capital: The New Wealth of Organizations*, Garden City, NY, Doubleday, 1997

Creating tomorrow's headlines today

At midpoint in the inquiry process, we began thinking about new ways to facilitate learning. Mary shared a story from another training event later in the 2004 voter registration campaign (see page 5). Because the storytelling exercise had been well received at the earlier training, she was asked to create another icebreaker. It was suggested by a colleague that she have participants say what they want to get out of the training. Mary wanted to use the icebreaker as a learning exercise:

> *I wanted the participants at this particular training to think strategically about why they were doing voter work, what their goals were, and what they wanted to get out of it. The way that I wanted them to reflect on this was to imagine that they were writing a news article the day after the election, and their voter work got noticed by the powers that be and the press. What would the headline be and what would some of the comments from their leaders and decision makers from the community be in the news article?*
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> *I contacted all of the organizations by phone a few days before the training to give them time to think about the assignment. I had some reluctant participants, but they all showed up with something. Upon arriving at the meeting, I handed out butcher paper to the attendees and asked them to write the headline and some of the points to be covered in the story. This technique got the attending organizers to think longer term and strategically and not just about what impact their efforts might have on the outcome of the 2004 presidential elections. What did it mean for their organizations? What's the message they wanted the public, their leaders, and decision makers to see?*
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> *It's exactly what I was trying to get people to think about: What did this mean in terms of message and positioning if you were going to write the article the next day?*

The exercise also worked as a way for the participants to get to know each other's organizations as well as frame concepts for development throughout the training. Some participants said they would use this idea in their home organizations to further their conversation about goals and strategy.

“Remember the wood chips”

In our struggle to understand what constitutes strategic, conceptual, and creative thinking, we explored the use of metaphors. Larry’s story of the “wood chips” helped us think more creatively about the power of metaphors.

> *I told this story to a group to get them to think about not rushing into actions, to think about how they were going to sustain their organization. I used to live in a house on a slight down slope. Every time it rained, the wood chips would wash away. My wife would ask me to plant grass, but I would just go out and get more wood chips, and before long, they would wash away again. Finally, I planted grass and didn’t have to keep going out to buy wood chips. Members of the organization tell me that whenever someone is pushing to move too fast, someone [else] says, “Remember the wood chips.”*

Mary recalled this story about metaphors during a meeting with her recently reorganized staff to deal with the challenge of getting the diverse groups to conceptualize ways of working together.

> *We need staff members who are nimble and versatile. I was asking our policy staff, our organizers, and our organization development specialists to learn more about each other’s practice, to get out of their comfort zones. There was a sense of angst in the room. We had just gone through a major reorganization. I could read their faces—what is she talking about, what does this mean? Then one of our staff spoke up. “Let’s think of it as though we are declaring our majors and minors in college. We don’t just learn one specialty—there’s a relationship in our practice between our major and our minor.” I jumped on this. I recalled the discussion of metaphors we had in our CI group. “I think this is a really helpful metaphor,” I said. I could tell that people were clear on what we needed to do. It placed the concept within their experience. I didn’t consciously use metaphors until then.*

Using Metaphors

People use metaphors all time. Many of these metaphors are expressions of our culture. They also give insight into the personal world views of people. Creatively used metaphors can help people look at a situation differently, opening up their frames of reference in a way that helps them see new possibilities. The story Mary tells in the accompanying text is a good example of this.

Here are some ways to use metaphors:

- Call attention to metaphors when they are expressed and reflect on the implications, such as what they suggest about assumptions people are holding;
- Invite people to brainstorm metaphors for a particular situation with which a group is struggling; and
- Use metaphors that speak from broad experiences common to the group, helping people become connected to the point being made.

Metaphors can lead to new conceptualization. For example, we often referred to the “space” created in our busy lives by getting together, which became a way of thinking about what was missing in our work with others in our organizations.

We decided to use metaphors ourselves to help better understand the abstract concepts of strategic, conceptual, and creative thinking. At the time there was considerable discussion in the press about how the intelligence community had failed to connect the dots. Consequently, what emerged was the metaphor of dots. Each dot represented a different stakeholder. Strategic thinking required connecting the dots in ways that would create new perspectives for looking at a strategic challenge. The "connect-the-dots" metaphor was utilized as a vehicle to further our interpretation of what strategic, creative, critical, and conceptual thinking would look like.

- **Creative:** What should the dots look like and how many different ways can they be arranged or rearranged?
- **Conceptual:** What is the meaning of dots? How can they be best connected?
- **Critical:** Why do we need dots and should they be connected?
- **Strategic:** How do these dots relate to where future dots may go? Where might other dots be now?

This exercise demonstrated the interdependence of these concepts. Creative, conceptual, critical, and strategic thinking are not synonymous with one another. One can be creative and conceptual, and not strategic. However, effective strategic thinking is both creative and conceptual. Furthermore, the dots are metaphors for people, organizations, institutions, and policies in the strategic political terrain.