Making the Most of Working Group Calls

A Call on Calls - Wednesday February 20, 2013

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Why this Call?	• Explore how Working Group calls are functioning as a tool for collective thinking and action (7 month milestone):
	  o Make clear Chris Stone's vision for these calls (see below)
	  o Understand what is working well in practice, and what could be done differently
	  o Discover what can be learned between call groups (Transparency & Accountability WG and the Individual Grants WG)
	  o Determine key issues and questions requiring more thought, resource and attention (see 'Top Needs' section below)

Key Issues To Consider Now	• *Staff support is absolutely vital* to making call series go well over time and OSF needs to consider the wider implications of this for staffing (capacity and competencies) as well as budget if we truly want to build the culture and capacity for integrated exchange.
	• *WG Calls benefit from holistic thinking as a series, as well as planning before, during and after* each call in order to maximize value of the series for participants.
	• *IT functionality is not optimized even in locations where it works best, and technology capacity across the network varies widely.* Call Leaders (and users) will require training and support in WEBEX (and other) functionality to enable best participation, including options for visualizing participants to each other, chat function, participant registrant tracking, ability to make and post audio recordings of call etc .
	• *If we want to promote these calls as a mechanism we need to:*
	  o Communicate about these CALLS from the TOP – Pres Office/Chris to Message
	  o Make tools and learnings (like these findings) available
	  o Explore how WG Calls can nest with and support other suite of tools (KARL communities, Design Teams, other mechanisms and practices that are currently in practice across the network, etc)

Guiding Principles	Inclusive, Participatory, Transparent, Productive, Actionable
Purpose	Purposes for participation in Working Group calls varies among participants and can differ between series. Prior to our meeting, Chris Stone described his own purposes for WG calls (see below) including 1) encouraging communication and collaboration across our global organization, 2) developing a standard conference call format, 3) taking greater advantage of lowest tech and least expensive method of dispersed group communication, especially since many of our colleagues operate in technology-poor environments 4) developing a common vocabulary of key terms 5) evolving some common standards of best practices 6) supporting problem-solving and analysis, and 7) building trust. Additional purposes we identified include the following, organized as a "typology" in three broad categories: 1. **Information Exchange**

	a. Share best practices on specific topics ('excellence' in grantmaking, what is due-diligence) b. Broaden knowledge of the work being done across the network on a shared interest c. Analyze and better understand a particular question, issue, opportunity or problem (Utility of Alumni Networks,) **2. Align Strategies, Identities, Work Plans** a. Clarify one's individual strategies by gaining a comparative perspective from others working on the problem; b. Hone or expand a clearer sense of identity of a particular OSF program or entity; c. Construct a joint narrative of where a project or campaign is located within a wider ecosystem of actors; d. Build collective strategies and theories-of-change (among OSF colleagues and with external partners/grantees) e. Improve or precipitate coordination on separate but parallel efforts f. Construct or calibrate work plans for joint work **3. Build Internal and External Power and Capacity** a. Authorize a new channel for action with OSF senior management b. Foster the culture and practice of community and collaboration at OSF – building trust and mutual investment in each other's work
Products / Results	If form follows function then understanding the purpose(s) of your Calls can help identify the products or concrete results ('crystalizing artifact') that you might want to produce through WG calls. Desired results could look very different across the group, and needs could shift over time. Facilitator/Organizers will want to balance the diversity of interests, needs and capacity when determining what products to produce. • 'Products' could take both a *substantive* form (mini-research products, memos, blog posts) and *process* form (creation of sub-committees to pursue a line of thinking to bring back to the group, etc.) Listening to and surveying the group for these responses can provide structure for call agendas (see below). • What form should products take (short written memos? Blog posts? Recorded discussions, in-person meetings)? How can these products be deployed to be of most use to call participants, the wider OSF network, and possibly beyond? • What are some effective process approaches for generating different kinds of products? o Use agenda-setting and follow-up processes to generate assets/products and deliver benefits. o s to deliver this
Process	1. **Facilitation** a. For Call Leaders, the role of facilitating and organizing these calls is both an art and a science. Staff support is crucial for optimal job and sustainability of effort (see above) 2. **Agenda Setting** a. Consultative agenda-setting approaches can help create buy-in among call participants and harness the real interests, needs and priorities of the group; b. Developing and disseminating a Agendas in advance (2-3 months) enables participants to prepare ahead, ask questions in advance, etc. resulting in richer

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discussions on the call;
c. Call Agendas can blend a variety of elements depending on the interests and needs of participants.
i. “Show-and-Tell” when members aren’t adequately familiar with each other’s work or projects;
ii. Inviting Presenters or Discussants to catalyze discussion on a topic;
iii. Facilitated Work Planning session;,
iv. Establishing a set of standing agenda Items (i.e. report-outs by sub-committees etc.) provides regular updates on recurring concerns

3. Roles of Participants
It is important to clarify the various roles of the call “engine” and to think strategically about them and their inter-relationship:
a. Leader(s) as Facilitator(s), Organizers? Who does what?
b. Role of Regular Participants/Contributors as “community organizers” (note that those most active on the calls have Job Descriptions and roles that give them the flexibility and agency to participate.)
c. Staff/Intern support (see below)

4. Essential Support for follow-up strategies and mechanisms

Follow-up between calls can dramatically advance discussion and thinking seeded on the calls. There are different ways to organize and prioritize the issues, questions and “threads” emerging from call discussions.

Volunteer Community Members can be solicited from participants to take up, follow and “weave” threads which can be brought back to Call Agendas or become products (memos, blog posts, mapping exercises, draft concepts etc) . This helps build engagement.

Program Staff will also need to be engaged to support this important work if optimization of the call is a goal. For example, a staff member (probably at the coordinator or program officer level) will be required to perform a hybrid content strategist + administrator role to conduct outreach and track participation (attendance), maintain and update any associated KARL community, and moderate, post and respond to questions, and draft blogs on the KARL community to keep it lively, active and responsive. This will likely involve individual outreach by phone or in person to community members to solicit agenda items.

IT Staff Support: Additionally, it would be so enormously helpful to have a dedicated person from IT troubleshooting the calls, which might even entail listening in on the line to fix problems (which is what happens for conference line at all-staffs). We need to make the technology succeed, which requires a lot of attention.

5. Logistics that affect participation & perception
a. Duration of Series: Fixed Term or Open? Takes times to build – 4-5 calls
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	b. Roll Call – How to make participants visible without seeming authoritarian? c. Timing of calls to maximize participation in Africa and Asia – might need to be earlier for New Yorkers d. Length of Calls = Length of Calls – 50 minutes perfect e. Recording: Taping calls to make them more widely available//Get up on KARL

Chris Stone on the Purpose of Working Group Calls

There are some general purposes that are straightforward: I want to encourage communication and collaboration across our global organization without flying people around. I want to develop a standard format for conference calls within OSF so that people who have attended one series can join another already knowing the protocols, expectations, and rituals. I want to take greater advantage of the lowest tech and least expensive method of dispersed group communication, especially since many of our colleagues operate in technology-poor environments.

In addition, I have a more complicated ambition for the calls that focus on a shared theme in our work (e.g., transparency) or a tool used widely across the network (e.g., individual grant making). While we currently have only one series on a theme and only one on a tool, I would hope that we would develop several more in each category over the next year, so making the purposes clear for these calls is especially important.

The challenge in managing our work on specific themes and our work with specific tools is marrying our commitment to pluralism with our desire for coordination and collaboration. The usual way that organizations push coordination and collaboration is by grouping staff into departments or other units under a single director or senior manager; but this succeeds at the expense of pluralism. In my experience, collaboration and coordination can succeed without bureaucratic structures and reporting lines if the collaborators share a common language for describing their work, a common set of standards for how they work, a shared set of problems they face in their work, and feelings of mutual trust. My hope is that the calls will foster all four. Let me say a few more words about each.

On Language: Words like “transparency,” “accountability,” “scholarships,” and “fellowships” probably means somewhat different things among the people at OSF who focus on them in their own work. Developing some precision in how we use these terms, and a common set of definitions within OSF will be essential groundwork for greater collaboration. For example, is a grant to a university for financial aid for students from a particular social group or geography properly thought of as giving a set of “scholarships” or is it better conceived as institutional support to the university? There is no correct answer to this question, but should there be a common understanding of the answer within OSF. I have firmer ideas about words like “democracy” and phrases like “rule of law,” but my fundamental ambition is the same here: to develop a common understanding within OSF of what we mean by words and terms like these that we use all the time but mean different things to different members of our organization.

On Standards: Practice varies widely within OSF about how we perform common tasks within the organization (e.g., preparing for a meeting, facilitating a panel discussion, using KARL) and outside the organization (e.g., conducting a site visit with a grantee, encouraging grantees to collaborate with each other, writing a public document). The persistence of widely differing standards impedes collaboration, as programs or foundations try to protect their reputations and partners from work by others within OSF whose standards they consider to be lower. By encouraging conversations in which, over time, each member of staff has a chance to speak about his or her own practice and listen to descriptions by others, I hope to encourage the development of shared standards that grow from the work itself. For example, a conversation about what we mean by "due diligence" in assessing the qualifications of a scholarship applicant, or what we look for on a site visit to a transparency grantee, should help us develop common standards.

On Shared Problems: There are many professional communities that have found ways of encouraging peer-to-peer coaching on recurring problems. Many school teachers, for example, now participate in groups of "critical friends," a set of 10-12 fellow teachers who meet every couple of weeks to share stories of homework that is unresponsive to the assignment, students who are underperforming on tests, or unruly classrooms. Teachers take turns presenting a problem they are facing and their "critical friends" react, suggesting what might be going wrong and how the presenter might alter his or her approach. Research analysts managing the investments of a pension fund participate in conference calls in which they take turns describing companies that they are examining, asking help from each other in how they might get behind the assertions of management or the lack of transparency in an off-shore entity. Public defenders in some offices attend weekly lunch meetings at which they take turn describing difficult cases in which they are facing obstacles to investigation or an intransigent prosecutor. In each of these examples and many others, peers (often at different levels in their hierarchies) share problems and trade possible solutions. I want to encourage that kind of exchange among professional staff at OSF, without putting one person in the position of dictating how others will do their jobs.

On Trust: When people gather physically or virtually on several occasions over an extended period of time, they develop deeper understanding of each other's motives, commitments, and priorities. That understanding does not guarantee trust-building, but it makes it possible. For this reason, I have encouraged frequent, shorter calls rather than longer calls spaced more widely apart. If people go two months between calls just because they missed one call, it will be harder for them to develop trust with others on the call or for others to come to trust them. On the other hand, when colleagues working on different continents finally meet together after participating in a series of calls over several months, they can begin their meeting with trust accumulated over all those calls.

This is a lot to ask of a series of conference calls. At the same time, developing a consistent habit of participation in these calls is a relatively inexpensive (in time and money) way of strengthening organizational culture and getting important work done. I have recommended that all of these call series have two consistent moderators, run for a consistent length (one hour), and follow a consistent format (agenda 24 hours in advance along with brief, attractive handouts; opening presentation limited to 5 minutes; discussion with individual comments/questions limited to 2 minutes each). While I have no stake in any of these particulars, I do have a stake in keeping the development of the format consistent across the calls, so if we change the rules on one call, I would like to change the rules on the all the calls.

Chris