



Sample Clarifying Conversation Document

BEFORE

This is the **First Draft** of the Document, before the Clarifying Conversation

A Blueprint of We Collaboration Document Between Founding Members of a Newly Created Community Institute: **One Member's Portion of the Document**



1. The Story of Us

VISION: We are collaboratively practicing ways to create stronger communities.

MISSION: To provide an incubator that creates structures that expand collective intelligence, neighborhood living, and collaboration, on all levels.

AIM: To provide research and training in cutting edge collaborative practices so that we can co-create a better future for ourselves and our children.

Mark's Story of Us:

Growth in collaborative skills are what is needed most in the world today and that makes it important for this group to succeed. I want to grow personally in emotional health, collaborative skills, and community, and I will learn a lot just by being involved with this group. I want to help grow community here.



2. Interactions Styles & Warning Signs

Mark's Interaction Styles:

- I am an introvert and work better with people that I know well than people I have only known a short time. I am not good at reading people so feedback and assistance with this is helpful to me.
- I am good at organizing information and strategic thinking. I prefer clear direction and I like to work on details. I like to get things done and make progress. I am proactive and don't like to avoid taking action. I value a diversity of outlooks and taking the time to "brainstorm".
- I am generally direct in the way that I communicate and approach things and frequently don't do subtle very well.
- I need time to process and react to things, and am not as good at off-the-cuff reactions.
- I have a good sense of humor but it is dry and when combined with my poker face, it can get me into trouble.

Mark's Warning Signs:

- When I am trying to emphasize a point sometimes this can come across as anger.
- If I get too caught up in the process and making what I see as progress, or if I get too far into the details it may be helpful to call for a "check-in" to see where everyone else is and if a change in mood is called for.
- If I am pushed to speak in a stressful situation I may say something in a thoughtless manner.
- If you disagree with me it is helpful to me to give logical reasons for your position or state that it is a gut feeling and what you need to clarify that feeling, if possible.
- In conflict I may need time to think through my thoughts and feelings before "talking it out".



3. Custom Design

Mark's Design Perspective:

- We are exploring the creation of a new organization. What form and direction it will take is yet to be determined. I expect to be open minded and have space for each persons views.
- I need to function at a higher level of consciousness and be more open to collaborating in order to help this group.

- I expect that as a group we need to learn to work collaboratively at a higher level before we can offer anything to others.
- I think that we need a joint spiritual/grounding practice of some sort to help us grow as a group.
- I expect this to be an enjoyable experience. If it is not, it is important to address this with the group before it becomes a big enough issue to cause anyone to leave.
- I expect us to be open and honest with one another.
- We need to be at an emotional and developmental stage as individuals and functioning closely enough as a collaborating group that we can “call one another out” in a loving way for the benefit of the individual and the group.



4. Questions for Peace & Possibility

If at any given moment one of us feels there's something out of place, we commit to coming together within 48 hours to go over these questions:

1. Have I worked through this issue first, myself, utilizing “the Work” or something similar to try to clear my issues?
2. Close your eyes and take several deep breaths. Find a place of centeredness.
3. Speak your truth.
4. Are there some external factors or stresses that we are under? Or have I misinterpreted something?
5. Has anyone been hurt or disrespected?
6. Is there something about me or my actions that you do not understand?
7. Is there something difficult we're avoiding saying or doing?
8. What do you need from me right now?
9. Do I have some shadow work or issues that appear to be surfacing?
10. What is in the best interest of our Vision, Mission, and Aim?
11. What would harmony look like to me?
12. Is it time to redefine our work together?

We also agree that if by chance something unimaginable happens and we can't manage to come together to go over the questions to return to a state of grace, we commit that we will not do anything to outright harm, speak negatively to others about, or create more pain for the other. We also agree on a long range time frame of three years to get back together to find peace if we can't seem to make it happen before then.



5. Short & Long-term Timeframes

Short-Term — Agree to talk about any problems that I perceive in our relationship within 48 hours.

Long-Term: I agree 3 years; also no harm to one another if the unimaginable happens

6. How Do We Leave or Quit?

~ If one of us desires to leave this group we will be honest enough to admit if it is a personal or time issue, personality issue, or the direction that the group is heading. We will make this known to the entire group. If the group dissolves...?



Sample Clarifying Conversation Document

AFTER

This is the Second Draft of the Document, after the Clarifying Conversation

Note: Blue text denotes additions to the BEFORE Sample

A Blueprint of We Collaboration Document Between Founding Members of a Newly Created Community Institute: **One Member's Portion of the Document**



1. The Story of Us

VISION: We are collaboratively practicing ways to create stronger communities.

MISSION: To provide an incubator that creates structures that expand collective intelligence, neighborhood living, and collaboration, on all levels.

AIM: To provide research and training in cutting edge collaborative practices so that we can co-create a better future for ourselves and our children.

Mark's Story of Us:

I own a house in the traditional neighborhood at Mountain Lake. My wife and I love our house, the neighborhood and the fantastic amenities across the street on the rest of the Mountain Lake property. Our neighbors are very friendly and we have no interest in ever living anywhere else. But, the residents of the traditional neighborhood do not seem to have much desire for any deeper level of collaboration or progressive activities beyond most other normal subdivisions. I have found myself making friends in the area, as well as attending workshops and activities in California, Vermont, and other places that are unnecessarily far away. I attended the Collaboration in Community series of events at the Mountain Lake Lodge and Spa and enjoyed engaging people in conversations of interest. I was disappointed that the traditional neighborhood residents were very poorly represented. Just to support the energy I attended the Dynamic Governance workshop. There I had to pick a group to join to model the Dynamic Governance techniques we were learning and I jumped at the chance to be a member of the Mountain Lake Institute group. After the seminar I was happy to continue to be a part of the group as they moved to lay out the form for an actual institute at Mountain Lake that would model and teach collaboration and community.

Why I am Drawn to the Mountain Lake Institute:

To me growth in consciousness and collaborative skills are what is needed most in the world today, and that makes it important for this group to succeed. I want to grow personally in emotional health, collaborative skills, and community, and I will learn a lot just by being involved with this group. I want to help grow community at Mountain Lake. If the Institute can be effective at teaching collaboration and building community, then the best place to prove that is in the traditional neighborhood. Part of my vision is an integrated collaboration of community energy flowing between all of the entities of Mountain Lake. I see me being an integral part of making that happen. I am intrigued with the concept of an integral village and economy, and growing food. I think that Mountain Lake Institute could be a new model of an integral Transition Town. The possibilities are endless.

Why I am drawn to each of you:

Andrea –high energy, intuitive, very in touch with feelings, your creativity flows can balance my analytical tendencies

Thomas – youthfulness, seeing through new eyes, questioning, high energy

Phillip – visionary, working on several levels at once, challenges me to stretch

Katie – committed to building intentional community for the 2nd stage of life (I need to know you better.)

Marcela – passionate about the tools of collaboration, balance of global perspective, and analytical approach

What I think I can contribute to this group:

I think strategically and organizationally and can convert ideas into organized, written plans. I am motivated to keep processes moving forward and to get past endless stages of talking. I can support others in their plans.



2. Interactions Styles & Warning Signs

Mark's Interaction Styles:

- I am an introvert and work better with people that I know well than with people I have only known a short time. I am not good at reading people and this can be a problem if I miss non-verbal cues during a meeting or conversation. I want to work on this and give everyone permission to give me direct feedback.
- I am good at organizing information and strategic thinking. I prefer clear direction and I like to work on details. I like to get things done and make progress. I am proactive and don't like to avoid taking action. A good meeting to me ends with several action items assigned. I prefer to "brainstorm" and have all options on the table prior to taking action.
- I am generally direct in the way that I communicate and approach things and frequently don't do subtle very well. You have my permission to be direct with me, it is helpful to me.
- I need time to process and react to things, and am not as good at off-the-cuff reactions. How much time I may need will vary; ask me.
- I have a good sense of humor but it is dry, and when combined with my poker face, it can get me into trouble. Once I am very comfortable with others, I open up and you may prefer me to show less humor. Let me know if that's the case.

Mark's Warning Signs:

- When I am trying to emphasize a point sometimes this can come across as anger. Direct feedback at this point is helpful to me and can prevent a misunderstanding.
- If I get too caught up in making what I see as progress and taking action, or if I get too far into the details, it may be helpful to call for a "check-in" to see where everyone else is and if a change in mood is called for. This will help me to remember to take a deep breath, and see other modes of operating. Again, everyone has permission to directly give me feedback to help me see this and grow.
- If I am pushed to speak in a stressful situation I may say something in a thoughtless manner. In conflict I may need time to think through my thoughts and feelings before "talking it out".
- My thought process usually functions in a logical manner. If you disagree with me it is helpful to me for you to give logical reasons for your position. If you function from a different place, or at that time can't state your position logically, it will help me if you let me know that. That might be a good learning opportunity for me.



3. Custom Design

Mark's Design Perspective:

- We are exploring the creation of a new organization. What form and direction it will take is yet to be determined. I expect to be open-minded and have space for each person's views.
- I need to function at a higher level of consciousness and be more open to collaboration to help this group. When I reach this point I will be functioning more often from my right brain and will be more intuitive and work better with people with different styles than me. If you see a way to support me moving into this higher space I would appreciate it. If you see me being more right brained let me know, and we can celebrate.
- I expect that as a group we need to learn to work collaboratively at a higher level before we can offer anything to others. I don't know what this higher level will look like, but maybe others in the group will. We could ask ourselves each meeting if we are operating from this space yet or not.
- I would like to invite the group to undertake a joint spiritual/grounding practice of some sort to help us grow as a group.

- I also invite the group to adopt the Blueprint of We to hold space for us to have the conversations that are needed now and to hopefully prevent more difficult conversations in the future.



4. Questions for Peace & Possibility

If at any given moment one of us feels there's something out of place, we commit to coming together within 48 hours to go over these questions:

1. Have I worked through this issue first myself, utilizing "The Work" or something similar to try to clear my issues?
2. Close our eyes and take several deep breaths. Find a place of centeredness.
3. Speak my truth and then listen from that place of calm centeredness.
4. Are there some external factors or stresses that we are under?
5. Has anyone been hurt or disrespected?
6. Is there something about me or my actions that you do not understand?
7. Is there something difficult we're avoiding saying or doing?
8. Do you think I have misinterpreted something?
9. What do you need from me right now?
10. Do I have some shadow work or issues that appear to be surfacing?
11. What is in the best interest of our Vision, Mission, and Aim?
12. What would harmony look like to me?
13. Is it time to redefine or redirect our work together?



5. Short & Long-Term Timeframes

Short-Term: Agree to talk about any problems that I perceive in our relationship within 48 hours.

Long-Term: We also agree on a long range time frame of no longer than 3 years to get back together to find peace, if we can't seem to make it happen before then.

We also agree that if by chance something unimaginable happens and we can't manage to come together to go over the questions to return to a state of grace, we commit that we will not do anything to outright harm, speak negatively to others about, or create more pain for the other.

6. How Do We Move On, If and When It Is Time?

If one of us desires to leave this group, we will be honest enough to admit if it is a personal or time issue, personality issue, or the direction that the group is heading. We will make this known to the entire group.

If the group dissolves, we will meet one last time to celebrate the energy and time that we invested in this project and into each other.