

# COLLABORATIVE INNOVATION

## *Essentials*

FOR SOLVING TOUGH PROBLEMS

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### Designing a Powerful Shared Intent

In this special resource, we provide a few pages from our Collaborative Innovation Essentials training manual that explain how to create a powerful shared intent. It includes the following elements:

- **Aligning Around a Shared Intent:** Why shared intent is so fundamental to the success of every collaboration.
  - **Powerful Goal:** How to create a goal that inspires and galvanizes organizations to come together to make it happen.
  - **Focus & Frame:** How to scope the work to prevent unproductive conflict and increase ownership from stakeholders.
  - **Critical Shifts:** How to define a clear problem space in which to design solutions..
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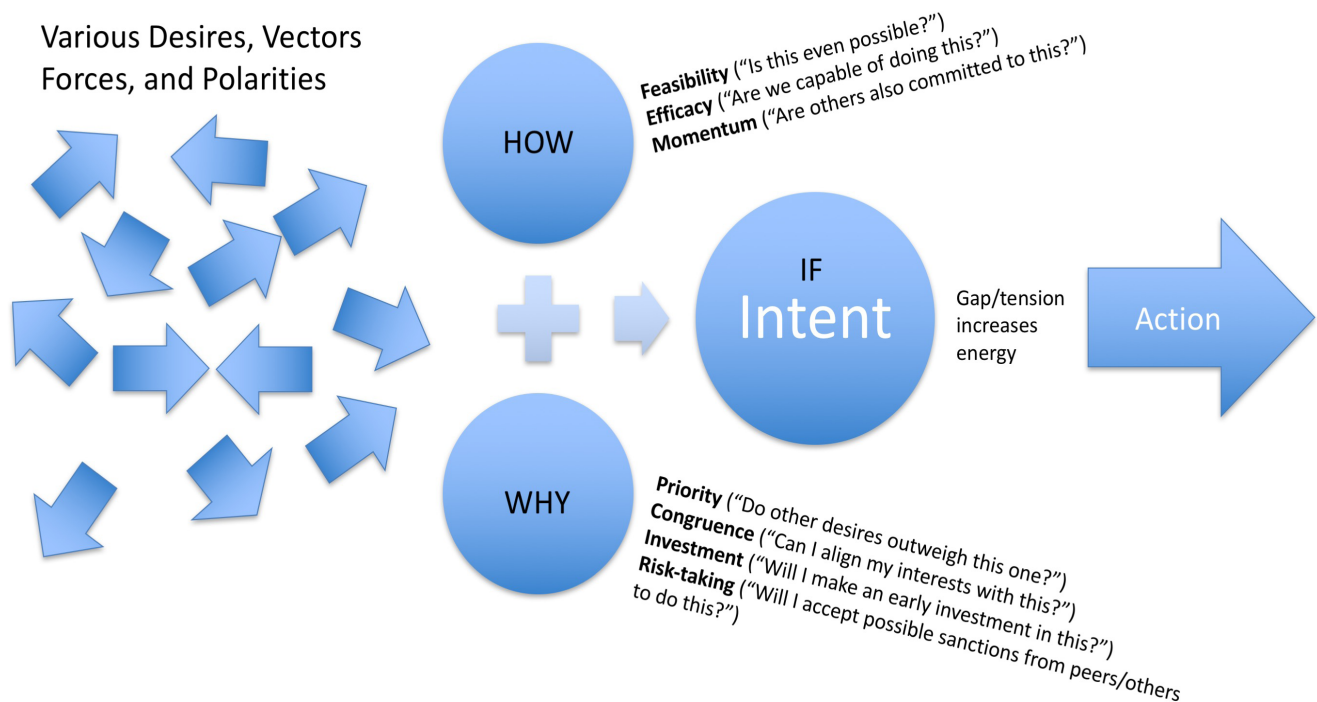


# Align Around a Shared Intent

## Why is shared intent so important?

A clear and powerful shared intent is fundamental to the success of any collaboration. It keeps diverse stakeholders at the table despite their differences, generates energy and momentum to fuel the work, and establishes the focus for everyone to stay on track amidst competing distractions and political forces.

In any collaborative social innovation process, we begin by developing key elements of intent using the “Intent Map.” The elements include designing a powerful goal (beyond SMART), defining your focus and frame, identifying the critical shifts for real transformative work, and addressing critical questions to guide the intent forward. While most powerful in the early stages of an initiative, the Intent Map is used as the point of reference for the span of the entire collaboration from up-front design, mid-point check-ins, and later-stage evaluations. We describe key elements of intent below.



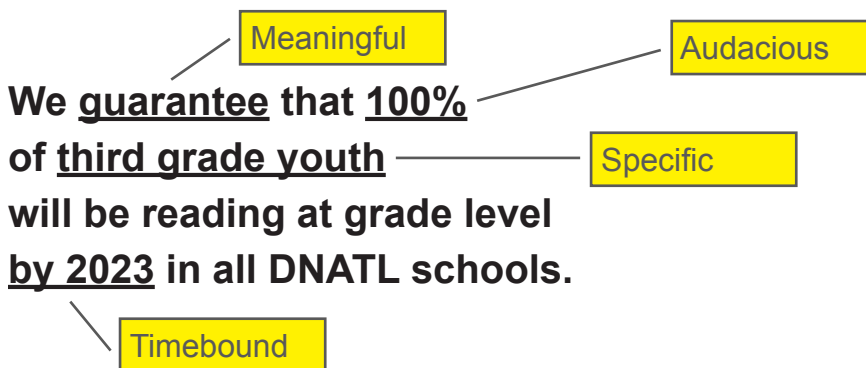
*Drawing on the work of Malle, B. F., Moses, L. J., & Baldwin, D. A. (2001). Intentions and intentionality: Foundations of social cognition. Cambridge, MA: MIT Press.*

# Creating a Powerful Goal

## Aspects of an effective collaboration goal

- Audacious
- Specific
- Timebound
- Meaningful

## Anatomy of an Effective Goal



## Example of an ineffective Goal

We're going to work to improve third grade reading levels.

## Why is the right goal important?

Having a good goal means that:

- People are forced to think and act at scale
- They can't rationalize lots of activities that won't add up to impact
- It makes sense organizations will have to come together to make it happen (i.e. one entity alone can't do it)
- It points everyone in the same direction
- It inspires and galvanizes commitment

# Focus & Frame

For any network we create, we have found a simple but powerful pattern that helps increase ownership and prevent unproductive conflict (as opposed to productive conflict, which we adore!). We call it “Focus & Frame.”

## What is the focus and the frame?

Imagine you take a photo of a friend. If you take the picture well (unless you’re being artistically creative), your friend’s face will be in focus. But in addition to your friend’s face, you’ll also see other things in the frame, maybe trees, a playground, or even a seedy bar. What’s in the frame provides useful context around your friend and you understand more fully what was happening around your friend at the time. In fact, if all your photos of your friend lacked the contextual information in frame, those friend photos would get quite dull after a while.

In our approach to goal setting with groups, the Focus is the thing we’re agreeing to, well, focus on and work explicitly to achieve. The Frame is where we place the other goals and concerns that we’re agreeing to also track and pay attention to.

So let’s say that you’re bringing together a collaboration to increase graduation rates in your local community—and graduation rates is the issue that your primary funder and community leaders care most about. But other stakeholders keep insisting that the initiative really needs to prepare kids for college or career, and that a high school diploma might not do either of those. How do you handle that conflict? Just decide yourself? Hack out a decision in which somebody will lose? Create a multi-faceted, complex goal with multiple metrics underneath it that might be difficult to organize and resource adequately?

One way to handle a challenge like that is to explain the concept of Focus & Frame and suggest something like this:

“So our focus will be on hitting a graduation rate of 98%. We’ll have both career prep and college readiness in our frame as we do that, so we don’t neglect those concerns. And other times, as the graduation rates start to rise, we can decide to move one or both of these other objectives into focus.”

## Why is the idea of Focus and Frame useful?

1. It helps us move forward with an agreement that usually works for all,
2. It helps us avoid unintended impacts on related goals that aren’t the group’s current focus,
3. It helps us look for opportunistic solutions that will advance interests in both our Focus and our Frame.

We’ve used the focus and frame concept in nearly all of our collaborations to help people come to the table across diverse interests and concerns. For example, in our work to eliminate worker exposures to hazardous chemicals in electronics facilities, the group is focused on that primary objective, but the group is also paying attention to discharges of hazardous chemicals into the environment. That helps us avoid creating solutions that lower direct worker exposures but increase environmental discharges, and also to look for those opportunities that will allow us to positively address both concerns.

# Critical Shifts

We use the critical shifts tool all the time in our work. They are the best way we've found to help a group define the "problem spaces" in which we need to design solutions. By using the critical shift approach to clearly defining the problem space rather than jumping right to making solutions, we get better, more powerful, and more appropriate and effective solutions. They also help clarify our intent and ground that intent in a specific and actionable shift we're trying to make happen out in the world.

A critical shift is simple to define and very powerful as a strategy tool, but takes real discipline to do well. People often mistake a critical shift as problem-solution statement.

A good shift is a statement with two parts: (1) A first statement that succinctly describes one specific part of that current strategic picture that isn't working right now, and (2) a second statement that succinctly describes how that part of the strategic picture should look in the future, if we're successful in our work.

Critical shifts can be about some part of an overall system or about specific people's experiences within that system. A system shift is typically written as a neutral statement. An experience shift is written in first person, usually starting with 'I', 'My', 'We', or 'Our'.

An effective network will be working to make multiple shifts happen simultaneously, and when those shifts are added together, they should represent a whole picture of the systemic change strategy.

## Experience Shifts...

- Arise from empathy interviews
- Are current and future experience statements that begin with "I" because we want to identify with a real person's (or persona's) experience.
- Are statements of feeling and direct experience, not general statements about policies, systems, or cultural values and tendencies.
- May reflect the experience of people within different segments or groups (like doctors or patients or nurses).
- Are about motivations/behaviors of people that effect the way they move through the system.
- They humanize and ground what's going on with people in the larger system.
- Are most powerful when there is a clear 'customer' for the work (e.g. people living on the street, people with diabetes, etc.) and we need to improve their situations specifically.

## System Shifts...





- Arise from expert interviews.
- Are current and future statements about the state of things. They do not begin with "I" because they aren't someone's experience. They describe what's not working about a specific part of the current system and how we want that part to be working in the future.
- Concern things that are impacting the whole system, like policies, technology,
- They may impact the experience of certain people in that system (and have correlate with an experience shift) but their full impact across the system can't entirely be communicat-

ed in an experience shift.

- Are about structural elements such as policies, infrastructure, tech, financial, etc. that influence how the system works and the experiences that people are having.
- They communicate the breadth and scale of what's going on in the system.
- There a pressure points on both ends to help nudge system change.
- Are most useful when there is a large complex system where the behaviors of many types of actors need to change and there may be multiple intervention points.

Most initiatives benefit from a mix of both types of shifts since they provide both the birds eye view of the whole system (which gives strategic perspective and insight) and the view of people's real experiences on the ground (which builds empathy and ensures that the impact touches real peoples' lives).

## Examples of Good & Bad Shift Statements

Current state	Future state
No local farms producing certain key food products	 Farms producing key products  8 key food products produced in our county
Teachers don't have time to schedule more meetings	 Teachers work longer hours  Teachers can comfortably make the time for informal parent discussions

The good examples above provide much more focus and clarity. We can start to generate more concrete ideas and “get to work” on those shifts. But a statement like “Local farms are producing key products,” on the other hand, leaves us confused and kind of stuck (we're just not sure what to do about it because it's too vague).

In the teaching example, however, we see that someone has tried to insert their favored solution in there as the future state. That clearly doesn't work because it stops any creative work and people will just start debating whether we should expect teachers to work longer hours. However, in the good future state example, the statement makes us curious, as in, “Okay, how might we do make that happen?”

So a good shift statement creates that invitation to start generating and designing ways to make the shift happen. A bad shift statement either confuses people or shuts down an effective brainstorming process.

Next time your group needs to solve a problem, have them first define the critical shift. Once they have a clean and compelling shift, have them generate ideas for how to make that shift happen. If you feel that open, engaged, generative energy, then you've got a shift that's really working!

## Notes: Develop 2 Experience Shifts

Current State

Future State

