

# High-Leverage Civic Strategies Workshop

Developed by Charlotte Kahn, Brendan Miller and Geeta Pradhan at  
The Boston Foundation during July 2001

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## Desired Outcomes

- Exploration of a shared vision for the future
- A greater understanding of key trends, why they are important, and what might be driving them
- An understanding of the characteristics of high-leverage civic agenda and an exploration of possible strategies that might constitute such an agenda
- Commitment to and excitement about the possibility of creating a high-leverage civic agenda over the next two years
- Deepened relationships across people, sectors and communities and an improved ability to work together

**Running Time:** 3 hours

## Workshop size

This workshop was designed for **20 or fewer people**. More could be accommodated with an appropriate room, A/V setup and more facilitators for the small group work, but it would not have the same feel and perhaps be less effective.

## Work to do in advance

- Get people to RSVP. Ask their permission to distribute contact information at the meeting.
- Send them some reading materials and agenda in advance so people come in the right frame of mind.
- Order food and reserve the room
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## Participant packets/materials

Each participant should receive a name tag and a packet containing the following:

- *Tipping Point* article from Malcolm Gladwell
- *Places to Intervene in a System* by Dana Meadows
- First chapter of *Justice as Fairness* by John Rawls
- A copy of the agenda
- A feedback form: one side is for the workshop, the other side for the Indicators Report
- A reading list for further reading
- A sheet describing key meta, macro, metro and Boston trends
- Copies of the handouts on high-leverage civic strategies, workforce development, and the high-leverage characteristics
- 4 sticky dots for use in the trend exercise

Make available the following optional handouts for participants:

- Slides on systems thinking in handout form
- Massachusetts State of the Environment Report 2000
- Copies of the *Ideavirus* article.

### **Room setup**

This setup refers to the Boston Foundation Boardroom at One Boston Place, but can be adapted.

1. Food should be placed in the back of the room.
2. The meta/macro/metro circle chart should be placed on the side wall where the 4 pictures currently are. To the left, post the "High-leverage strategies" poster and the "Visions 2030" heading with room for visions to be posted. To the right should be "Past accomplishments" heading with room for accomplishments to be posted.
3. 4 easels should be at the front of the room with sufficient self-stick paper.
4. 2 easels should be off to the side, prepped with these headings:
  - 1: Visions, Visions, Trends, Trends
  - 2: Accomplishments, Accomplishments, +/-/? Shape, +/-/? Shape
5. 2 easels should be at the front of the room for easy reading, one with the agenda and one with the ground rules. Move these to the side wall after Introduction.
6. The "Timeline" should be posted on the side wall with windows.
7. The front wall should have all of the pre-made charts related to the trends, as well as the "Current Trends" sheet. The "Trends" heading should also be here with room for the brainstormed trends to be posted.
8. People side around the table.

## Pre-made flip charts required

1. Agenda
  - Welcome and background
  - Ice-breaker and visioning exercise
  - Current trends that could shape our future
  - Trend drivers
  - High-leverage strategies
  - Closing and feedback
2. Ground Rules
  - Respect other participants' views, ideas, and perspectives
  - Seek first to understand, then to be understood
  - Use "both/and" rather than "either/or" thinking
  - Investigate the assumptions behind our different perspectives
3. Desired Outcomes
  - *List desired outcomes here...*
4. Timeline
5. Trend Shapes  
(do these pictorially)
  - A (flat)
  - B (oscillating)
  - C (steady decrease)
  - D (steady increase)
  - E (exponential decrease)
  - F (exponential increase)
6. Vision 2030
7. Past Accomplishments
8. Trends
9. High-Leverage Strategies (the iceberg)
10. Current Trends
  - Diversified/Strong Economy
  - Income Inequality
  - Suburban Sprawl
  - Competition for Housing Resources
  - Jobs/Skills Mismatch
  - Demographic Change (Race, Ethnicity, Household Size)
  - Racial Disparities in Health and Educational Outcomes
  - Environmental Improvements and Degradation
  - Embryo of Regional Consciousness
11. Trends That Could Shape Our Future
12. Trend Drivers
13. High-Leverage Strategies

**!!! Put instructions in here**

The following are pre-made computer charts and graphs, either from the BRA or MAPC.

1. Industrial mix chart
2. Minorities in the region map
3. MCAS chart
4. Race and age breakdown for Boston chart
5. Housing costs and median income chart
6. Household map regionally
7. Growth in population, housing, land developed, and miles traveled
8. Income and cost of living chart

# Workshop Script

## Settle in, Refreshments

15 mins

Encourage people to look at trends on the walls and mingle while they wait

## Welcome and Background

10 mins

GEETA

- Introduce self

### Timeline and “you are here” for the Indicators Project

Let people know that the goal here is not to help refine a research project (i.e. not to give feedback on the indicators report, although people should be directed to the form if they would like to do that), but to represent themselves as residents and citizens, and whatever constituency of the city they work with.

- This session, unlike previous indicators meetings, is going to focus on a vision for the future and how we get there. We are not going to revisit the indicators at this point, but we do want your feedback and suggestions on the report itself. In your packet is a form for your comments and an invitation to ask us to call you.

### !!! finish scripting

- Introduce the team
- Quickly go over ground rules
- Go over agenda
- Be clear why we are all here

### Desired outcomes/purpose

- Go over desired outcomes

- o Note that packet contains supplemental and thought provoking material that represent new ways of think that we encourage them to look at AFTERWARDS.

**!!! Restroom directions and get permission to collect and share contact info**

## **Ice-breaker and Visioning Exercise**

**50 mins**

**CHARLOTTE** (+ a recorder)

- 5 mins** Take a minute to think about your answers to the following questions:
- 1) What accomplishment – personal or professional - - that has made Boston and the region a better place to live within the past 30 years -- are you most proud of? *Note: This can be left out if more time is desired for the second question.*
  - 2) Imagine that the year is 2030. The Greater Boston region is known for the high quality of life it offers its very diverse residents. Another way to think about it is that Boston is now a “World Class” city and an example to the rest of the world. What does that mean to you? Help to paint a detailed picture of the future you would like to part of creating over the next 30 years. Describe one thing that you would like to see that is a part of your vision of sustainable prosperity for the region. (Examples from others: streets lined with tall trees; a health care system with universal access focused on prevention;; looking at newborns of all races with no sense of “predestination”, etc.)
- 8 mins** Talk to person to your right and share your answers, 4 minutes each.

- 30 mins** Go around, report out name, organization, and in several brief phrases, share your accomplishment and vision. WRITE VISIONS UP AS THEY ARE SPOKEN
- *This can be good to videotape.*
- 5 mins** Ask whole group:
- "Do most or all of the visions seem to be part of a larger whole? "
  - "Do any of these visions seem to be at odds? If so, which ones?"
  - "Is there a way in which the spirit and values behind these two visions and our ground rules can be upheld by a single vision that embraces both?"
  - Discuss.
- 2 mins** Close: Note the large amount of agreement, express hope that we can eventually create share a vision for the future. Note that we will be compiling the result from all the workshops.

## **Current Trends that Could Shape Our Future**

**35 mins**

**BRENDAN** (+ Charlotte + a recorder)

**Charlotte**

- 7 mins** Change is happening faster and faster. My mother uses email and I have a phone in my purse. I would never have thought either of these things would be true 5 years ago.
- First Indicators Report focused on baseline data at the turn of the century/millennium. We now realize

that we need to focus on trends and change over time.

- (Referring to Meta-macro-metro picture) Meta trend is that we are now in the information age, as of 1950. Before that we were in Industrial Age for 200 years, before that the Agrarian for 5000? Years, and before that we hunted and gathered for ??? years.
- At the macro level, globalization is a reality for better and worse. Borders are disintegrating and capital moves at the speed of light.
- At the metro level, we have a brain economy: there is a shift from manufacturing to industries dependent on higher education (higher ed, health care, high tech, bio tech, financial services, the creative cluster and tourism).
- Despite our current strong economy (and sometimes because of it), not all trends going in the right direction:
  - Mismatch of jobs and skills (1 in 3 works unprepared for the new economy – MassINC)
  - Gap between wages and housing prices. High cost of living leads to long time residents being forced out and discourages skilled workers from coming and staying
  - Changing demographics and distribution: older cities with concentrated poor, new jobs/family housing at 495. These lead to sprawl, environmental degradation, loss of quality of life and tourism.

**Brendan**

**3 mins**

Charlotte has given you a sense of why trends are important and described some of the key ones affecting Boston. But you are our experts and we want to hear what you think. In your different roles as citizens, residents, and professionals what trends are of greatest concern to you when you think about achieving the shared vision for Boston we articulated

earlier? Please make sure to list trends that are important to you even if Charlotte mentioned them earlier because we will be ranking and choosing a few for further investigation. There may be some trends moving the right direction that you are worried may be derailed. Or there may be trends going in the wrong direction that need to be moved in a positive direction. OR there may be trends that you are just sure are important, but you're not sure what impact they will have: maybe some good things and some bad things.

**5 mins** Give people time to think independently and create a list of 3-5 trends *in their lives* that they think are very important to consider in the context of achieving our vision (either positive, negative or ambiguous). Be clear that even if Charlotte mentioned a trend earlier that they should share the trends they think are most important.

- Alternative: Give people 2 minutes individually and 3 minutes to brainstorm with the person next to them.

**15 mins** In whole group, list approximately 15 trends. As people share them, have them say whether it is positive, negative, or ambiguous, and select a trend shape that most closely matches it. Sketch these next to the trend descriptions.  
GO ROUND ROBIN.

**5 mins** Ask if any on brainstormed list are IDENTICAL and combine as needed now.

- Give each person 4 dots to come up with top choices. Select 3 top trends for further investigation.
- Let people get more food, use the bathroom here.
- Write the 3 top trends selected on chart paper, one trend per page on separate easels, numbered 1-3, for each of the groups to use. Spread these throughout the boardroom. (Note that if they picked

trends for which we don't have data, it probably means we need to include them in the next indicators report.)

## Trend drivers and High-Leverage Strategies

63 mins

**BRENDAN** (+ Charlotte)

5 mins      Now that we have identified the trends that are of most interest and importance to you in context of achieving our shared vision, we would like to look for drivers of these trends. By drivers, we mean those things that seem to play a large role in shaping the trend. Again, if our goal is to begin to identify high-leverage strategies, these strategies will necessarily impact the drivers of the trends that concern us. REFER TO ICEBERG DIAGRAM. Explain that underneath everyday reality are trends, and behind them are the systems that generate them, and even deeper are our mental models and understandings of the world. It is often the deepest things that drive a trend.

As an example of what we'd like you to do, please consider the trend of the decline in youth voting rates. What are possible drivers of this trend?

- They have a perception of politics as corrupt and don't want to get involved
- Materialistic culture that distracts them from real issues
- Decline in social capital and connection to one another destroys faith in common institutions and processes
- Don't believe that individuals can make a difference

- Lack of civics education: don't know how the political process works
- ELICIT A FEW.
- Barriers of convenience
- Few role models
- Peer pressure (it's not cool)
- News reporting

These things are clearly related and systems thinking can be very helpful in disentangling the specific connections between them, but we also often have an intuitive sense of what the "deepest" drivers are? That's what we'd like from you today.

If we can quickly count off in fours, your number will determine which group you are in and which trend you will work on. Group 1 will work on \_\_\_\_, 2 on \_\_\_\_, and 3 on \_\_\_\_, etc. Please select a recorder and timekeeper for your group. **We will have one of us facilitate each group.**

First, please list approximately 10 factors in your small groups that you feel may be driving the trend and then see if you can agree upon 1 or 2 that are the deepest. *Facilitators: Try to push deeper towards mindsets (attitudes, values, assumptions) that drive by asking people to look behind the drivers they suggest. When selecting the top drivers, note that people may not believe there is anything to be done about mindset, but we should select them as deepest drivers if we believe them to be deepest. If people say "that's just the way it is" push back on that and probe to see if it has always been that way, or is that way everywhere. Get them to agree that it is a choice, not innate.*

- 15 mins** In small groups with facilitators
- 8 minutes to brainstorm drivers
  - 7 minutes to try to select 1 or 2

**Brendan**

**6 mins** Now we would like to ask you what strategies you believe will move the trends more towards our vision, or keep them on track as the case may be. In particular we are looking for *high-leverage* strategies.

- Definition: High-leverage strategies are efficient, well-focused actions that produce significant, enduring improvements. (Senge, 1990) These kind of strategies are very rare unfortunately, and hard to find, but tremendously valuable once identified.
- REFER TO HIGH-LEVERAGE STRATEGIES "ICEBERG" and note that these strategies influence both system structure and people's mental models. Note that another way to say "significant and enduring" is "profound" change, which is a term Peter Senge uses. "Profound" may better capture the spirit of the strategies we are looking for.
- Acknowledge that often deep changes (like to peoples' mental models) meet with resistance when pushed upon people. Their goal is not to change people but to create a situation in which people want to change themselves. "People do not resist change; they resist being changed." – Richard Beckhard, quoted by Peter Senge.
- REFER TO HIGH-LEVERAGE STRATEGY SLIDES Brendan explains the characteristics of high leverage

**Charlotte** Talk about Workforce Development example. Say that there is hope that through workforce development a high-leverage strategy may be

developed. Such a strategy would impact drivers of workforce development, but also drive other trends (e.g. k-12 education, the economy, etc.)

**Brendan** *This section is good for videotaping.*

15 mins First please brainstorm several possible such high-leverage strategies and record, remembering that such strategies will necessarily impact the key drivers you identified. *Facilitators: really focus groups on influencing the key drivers.*

- Then in conversation with your group, identify a single top candidate to nominate and report out.

**20 mins** Have each small group report out their top drivers and top strategies.

- Have groups comment on each others' work and think about connections between them as time permits. How do the drivers and strategies relate? RECORD THEIR IDEAS.

**Charlotte**

5 mins

But to test which are the truest high-leverage strategies requires additional work due to things such as unintended consequences, delayed feedback in the systems we are trying to effect and the impact of trends we may not yet see or understand clearly.

We hope to be able to take more time to understand these things in a Scenario Planning process later this fall (to which we will invite about 50 people, balanced in every possible way) to explore different ways in which current trends could play out and testing interventions.

The truth is that most strategies are not high-leverage. High-leverage strategies are difficult to identify and usually not immediately obvious (although it is also possible that the ones you selected are exactly those.)

## Closing Remarks and Feedback

15 mins

CHARLOTTE (+ a recorder)

5 mins

Summarize key lessons of the workshop:

- Sharing and reconciling our person visions can result in a shared vision that creates a strong “pull’ towards a positive future. A shared vision is not a compromise or lowest common denominator: it is vivid and powerful and can accommodate the diversity of our individual visions. It is important to note that the visions you articulated are highly consistent and this has been our experience with other groups as well, which is a source of hope for the future.
- The gap between current reality and our visions can be hard to bear, but it is this gap that yields the creative tension and motivation needed to get us to do the necessary work.
- Trends are an important way to understand where we’ve been, where we are, and where we are going. Some important trends are national or global, but many more important trends can be influenced by the greater Boston civic community.
- If we don’t like where trends are taking us (e.g. away from our vision) or we are concerned that good trends may falter, we can understand what is driving them so that we can get them going strongly in the right direction.
- Our attitudes, values, beliefs, assumptions are often the deepest drivers of trends. They say what can and

cannot be done and set limits on our ability to find creative both/and solutions.

- When we understand what is really driving important trends, we can begin to talk about high-leverage civic strategies to address them. High-leverage strategies influence drivers and affect the way people think and act in an enduring way. They are hard to find, but worth the effort, because they allow us to focus our energies without fears of letting anything important go unattended.
- A collection of a few high-leverage civic strategies could form a civic agenda to move us purposefully towards our vision.

Note this is just the tip of the iceberg when it comes to systems thinking, which is a powerful language and set of tools for understanding and learning to manage complexity. Let people know that they can pick up a copy of a slide presentation on systems thinking that was used in previous versions of this workshop (but was cut in order to make the workshop more interactive) and that should consider reading some of the books on the reading list of they would like to know more.

PLEASE STAY INVOLVED. One thing we do know is that Greater Boston has the social and intellectual capital – you in this room and many others – the civic dynamism, the ideas, the experience and knowledge to come up with shared long-term goals – a vision for the future – and a set of high-leverage strategies to get us there by 2030 (even though many of us will arrive there on walkers....).

We may be able identify a high-leverage civic agenda by time of the 2002 Report, or it may take

until 2004, but we can make and mark our progress along the way.

THANK YOU for your time and expertise. We look forward to sharing the results of your work with others and to working with you again. At the moment, we are planning an early December Citizen Seminar to share the results of this work and chart the next step. We hope to set up a website or email list serve in order to keep you connected. The Scenario Planning Process will take place in November.

**10 mins** Plus/Delta

- Record positive things about the workshop and things that people would like to change. Focus the group's attention on any area of particular concern to you.