


5 Levels of Engagement

1. What's our intent? 2. Where are we now? 3. Where do we need to be? 4. What's necessary to achieve the change we seek?



	Level 1	Level 2	Level 3	Level 4	Level 5
Complexity	Clock				Cloud
Level	Inform ¹	Consult ¹	Involve ¹	Collaborate ¹	Co-create
Intent	Understand	Improve ²	Evolve ²	Invent ²	Transform ²
What is co-determined?	Nothing	Problem	Analysis	Solutions	Vision
Example methods	One-way Communication	Arbitration or Direction (another decides)	Mediation/Negotiation	Interest-based Design/ Negotiations	Co-design
Stakeholder experience	<i>"I was updated on a decision."</i>	<i>"I shared my experience with the problem."</i>	<i>"My input was included in the analysis."</i>	<i>"All our needs and interests are shaping the solutions."</i>	<i>"We did it all together, including deciding the vision and goals."</i>
Appropriate for...		Resolving conflict (e.g., over a shared, limited resource)	Finding a more agreeable resolution to the focal problem	Designing win-win solutions to a complex shared problem	Co-designing and actualizing a shared future that works for all
Challenges	Making sure the communications "land" and are meaningful	Getting people to agree that the problem is a problem and that it's their problem too	Ensuring that the analysis draws in enough diversity of experience and perspective	Setting aside favored solutions to allow genuine collaboration	Helping people work together effectively across differences around a deeply shared intent

¹ Based on the International Association for Public Participation (IAP²), except we use "Co-create" rather than "Empower."

² Based on levels of innovation from Cheskin Research.

All other content from CoCreative Consulting, LLC

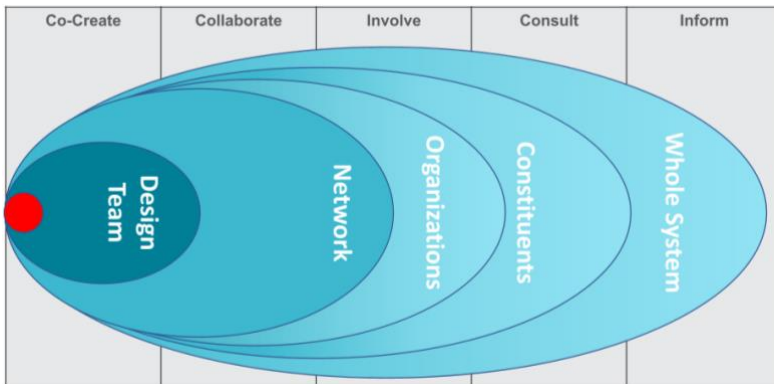
Overview

This framework helps us compare and contrast different levels/depths of engagement.

All 5 levels of engagement have value. For example, if you live in a coastal town and a tidal wave is coming, that's probably not a good time for level 5 engagement. It's far more appropriate to urgently inform people that they have to get to high ground. (The word "urgently" is important there because leaders often operate out of a sense of false urgency or short-termism, which pulls them toward engaging others at levels 1 or 2.)

Our hypothesis is that shifting complex systems requires Level 5 engagement of key stakeholders over time.

You can and should work to engage at all levels in systems change work



9 Guidelines for Genuine Engagement

- 1 Identify the appropriate level for the challenge you're working on.** More dynamic and systemic challenges require higher levels of engagement.
- 2 Clarify the level at which you are really willing to engage.** Being congruent is key to building trust.
- 3 Ask others what the levels look like to them.** What looks like co-creation to you might look like consultation to someone else.
- 4 Ask stakeholders at what level they want to engage.** The greatest use (and abuse) of power in any collaboration is determining the levels at which others engage.
- 5 Carefully select stakeholders for high-engagement approaches.** These are not always people with the most power but those whom others respect.
- 6 Don't talk as if you're engaging people at a higher level than you really are.** That's the surest way to foster cynicism and distrust.
- 7 Design appropriate communication, consultation, and collaboration strategies** to engage stakeholders at various levels.
- 8 Don't equate more engagement with "slow" or "cumbersome" processes.** High engagement collaborations can also be(come) fast-moving and dynamic.
- 9 Work over time to engage more leaders toward level 5.** The more leaders who co-own the vision, analysis, and strategy, the bigger the change.

Sample Learning Experience

Guided Reflection

I want you to place yourself in some else's shoes for the next few minutes.

Imagine that you are a member of a community where you're raising your family, where you feel connected to the people and the land. You're a part of this community and you know that it has a lot of strengths and that it also has some real challenges.

One day, an outside group of experts shows up and say that they want to help improve your community. They set up meetings around the town. They ask the community to come together to share their concerns about the community and hear their ideas for the potential improvements. They ask people to share their hopes and dreams.

And they ask you as a leader in the community to participate in a one-on-one interview and to complete a survey to share about your key pain points and potential solutions that you believe might be pivotal in moving your community forward. They have also asked you to identify other people in the community to communicate with to gather information from. You agree to make those connections and you keep your word.

After spending 3 to 6 months gathering information, the outside group publishes a report. This report describes the challenges of the community, at some points in painful ways.

In that report, the outside group reveals a handful of strategies for improving the community. But you see that one of the strategies they describe relates at all to the ideas that you and others in your community agreed were most critical. The other strategies are things that you know would be a waste of time or may even be harmful to your community.

...Right now, I want you to bring your attention to your body. What are you feeling at this moment? Where are you feeling this? Please sit with that feeling for now.

...Now please share a few words using the Zoom chat about what you feel about this experience.

...Okay, now, please acknowledge that feeling by naming it.

Now let's shake that off. Shake your hands, arms, shoulders, body, legs, to let go of that for now.

Personal Reflection

Now I will ask you to draw on *your own* experience.

Please reflect back to a time when you were deeply and meaningfully engaged in compelling work with others, where you and everyone involved were shaping the purpose of the work, the analysis, and the solutions together. You have a sense that you can show up fully as you who are and engage deeply in this meaningful work.

What are you seeing? ...

What are you hearing? ...

Now what are you feeling in your body? ...Your gut? ...Your heart? ...Your spirit? ...once you've connected to that feeling, give it a name



Please share a few words using the Zoom chat about what you feel about this experience.

Please hold on to those two different experiences as we explore various levels of engagement.

In Sharing Groups of 3:

- *From your individual reflection, what contributed to your experience of being meaningfully engaged in collaboration with others?*
- *At what level are most of the stakeholders in your Change System being engaged?*
- *4 minutes each. Please be mindful of time.*

In plenary: “For people to take big risks, be vulnerable with one another, let go of their preconceived ideas and plans, trust one another in the work, and work through the difficult challenges of changing entrenched systems, they need to feel that feeling that you just shared”

Introduce the 5 levels.

Sharing in Collaborations

Collaboration can involve sharing many things. Level 5 engagement means sharing all of these.

Shared Information We all have information about what’s going on

Shared Problem We share the belief that something needs to change

Shared Intent We share the intent to do something about it

Shared Commitment We share a collective commitment to the goals, outcomes, one another, and the greater purpose

Shared Analysis We’ve studied the issue and share the same hypotheses

Shared Shifts We’ve clearly identified the strategic shifts or leverage points.

Shared Plan We share an overall plan of action

Shared Role Clarity We each know our part in that plan

Shared Solutions We are all advancing the same set of solutions and interventions, though we might be working on different parts

Shared Value We can all see how each party will benefit from the change

Shared Priorities We all know what needs to happen first

Shared Criteria We share evaluation criteria and data to evaluate progress

Shared Vision We share a big vision of what we’re creating together