

Enhancing and Accessing Expertise: Creating Collaborative Communities of Heart

William Bergquist Ph.D. and Kevin Weitz, Psy.D.

How do we improve not just the quality of expertise being delivered in mid-21st century societies, but also access to and acceptance of high-quality expertise? We believe that quality is improved with diversity of input and both access and acceptance are improved with a broad-based collaboration among diverse communities. What is the nature of such a venture in collaboration among diverse communities and how does this collaboration ensure (or at least increase the probability) of expertise being created and shared that is credible and of high quality?

Community Capital and Expertise

To begin with, the creation and use of high quality and credible expertise requires capital. This usually means the expenditure of a large amount of money so that highly-paid experts can be brought in to solve a problem—and then ride out of town on their silver stallion. This type of expertise not only can't be afforded, ultimately it does not provide either the shared credibility or continuity that is needed for long-term solution to challenging issues.

We propose a quite different portrait of the resources that are needed. Effective engagement of expertise and effective use of the expertise that is provided requires the expanded use of what we are defining as community capital. Community capital incorporates three elements that are found in or holds the potential to be found in all viable communities. Each of these elements relates to a specific source of expertise.

Natural Capital

First, there is Natural Capital. the community is located in an environment that is filled with many resources for extraction (such as trees, minerals or fish), for production (such as physical facilities and machines) or tourism (beautiful or historical setting). We propose that there are parallels in the domain of collective expertise and the often-temporary communities in which collective expertise is engaged to what exists in the domain of physical communities. The natural capital that is found in physical communities is replicated in the *Natural Expertise* that exists in settings where important issues are being addressed.

This natural expertise consists of the technical knowledge to be found in this setting regarding the issues being addressed. "Who knows how to fix this?" "What do we need to do in preparing for the launch of this project?" This natural expertise also is found among those participants who know how to create the conditions for collective expertise. As we soon will be describing, there are structures, processes and

attitudes that directly enhance the engagement and use of expertise. There are people who know how to bring these sources of enhancement to the table (or room).

Human and Social Capital

The second source of community capital is the human and social capital that is located in the community. These are the highly educated or technically skillful citizens who live in the community, as well as the dedication of the community to provide education and training that further expands this form of community capital. In the domain of expertise, there are valuable participants who are knowledgeable about who is in the know. While they might not directly possess technical knowledge, they know where to find it and who is a credible and useful source of this knowledge. They are providing *Linkage Expertise*.

During the 1970s, Donald Schon (1973) identified the way in which our world is beginning to look more like a series of networks than a set of hierarchical organizations. He was quite prophetic in his forecasting and made a quite relevant point that some people reside at the nodes of these networks. They are knowledgeable about the nature, purpose and scope of the network and can readily link “outsiders” to many residents of the network. In an age when knowledge is changing quickly and skills are soon outdated, the network expert might be even more valuable than the person with direct technical expertise—for it is often better to know who is now “in the know” than to attempt acquisition of the rapidly changing knowledge yourself.

Institutional Capital

The third source of community capital is the institutional capital that exist in the capital to provide financial support (such as banks), governmental protection (such as human service agencies and courts), and guidance (such as the churches). Comparable expertise concerns the identification of needs that must be met if the work now being down is to be successful. In communities, these are the sources of financial and institutional capital. Similar sources are needed regarding any collaborative project.

Need-Based Expertise centers on finding answers to several specific questions: “Who are the stakeholders?” “Who are the customers?” “Where do we get the sponsorship and resources needed to start and sustain this initiative?” The experts in marketing, needs assessment, and representation of diverse interests are of great value (if often ignored or under-appreciated). These are participants who have their “ear to the ground” and their eyes clearly focused on what people need. As we shall frequently note in this essay, the strength of collective expertise often resides in the diversity of perspectives being entertained. This diversity often is invested in the identification of needs rather than the more obvious incorporation of diverse perspectives and practices related to the issue being addressed.

Rocks, Marbles and Sand

An insightful metaphor has been offered by Ron Kitchens and his colleagues (Kitchens, Gross and Smith, 2008) regarding community capital. He suggests that a community is vital when there are rocks, marbles and sand in the community. The rocks are major institutions (such as businesses, schools, banks,

government agencies). Marbles are the small organizations that make the community attractive and diverse (such as art centers, museums, nature preserves, sports facilities).

Finally, there is the sand which is to be found in the informal and often unplanned activities and interpersonal interactions that contribute to the warmth in a community (such as the way in which people walk with a feeling of safety through the streets, the way in which people care about the appearance of their homes and businesses, the way in which new residents are welcomed to the community rather than being isolated). We suggest that there is a similar need for rocks, marbles and sand in those communities where expertise is being acknowledge and engaged in a collective manner. Furthermore, we believe that these communities are now to be found in many societies – and that their existence in American societies can be traced back to the founding of this country.

Communities of Heart

During the formative years of North American democracy (1830s), an observant historian from France, Alexander de Tocqueville, wrote about “Habits of the Health” that exemplified the best of North American communities. This term, “habits of the heart”, was used more recently (1985) by Robert Bellah and his colleagues in their own examination of North American communities.

What conditions seemed to reside at the heart of North American communities (and North American democracy) in 1831? According to de Tocqueville, these are:

1. Equality of opportunity, knowledge and status exist in the community
 - a. No one person has all the answers or all the authority
 - b. Collective wisdom
2. Setting exist in the community for vivid and sustained dialogue
 - a. Meetings in the town square
 - b. “Soap-box” democracy
3. Shared interests and reasons of mutual support are to be found in the community
 - a. Self-interest is served by assisting others
 - b. A systems-based understanding of mutual support
4. Civic associations (non-government community-oriented institutions) are prevalent in the community
 - a. The great value to be found outside government
 - b. NGO collaborations
5. Emphasis is placed on useful action within the community
 - a. Watch and evaluated what I do, not what I say
 - b. Everyone in a small, isolated community sees everything: the front porch
6. Emphasis is placed on experience-based action within the community
 - a. Informed action based on experience, not theory
 - b. Show me what you have learned by trying it out
7. Abiding belief is to be found in the community with regard to human progress and a sense of greater purpose in life

- a. A spiritual life (not necessarily religious)
- b. Commitment based on dedication to a higher principle/purpose

The first four of these conditions might be identified as “habits of the collective heart”, while the last three could be clustered together as “habits of the personal heart.” We explored habits of the personal heart in our companion essay and turn to habits of the collective heart in this essay.

Finding and Creating Collaborating Communities of Heart

Are these conditions still to be found in North American communities? Are the rocks, marbles and sand identified by Kitchen to be found in many mid-21st Century communities? Given the deep polarization that seems to exist now in North American society, can there still be those habits of the collective heart that de Tocqueville identified and celebrated more than 180 years ago? Is the sand missing which brings people together? Are the rocks and marbles either absent or directed toward purposes that no longer enhance public welfare? With North American citizens living and working in isolation from one another, how do they effectively address the diverse and critical challenges of their 21st Century communities—ranging from the pollution of local estuaries to decline in the local economy, and from the absence of affordable housing and affordable theater to the health care demands of a graying population? Can North American democracy somehow survive in our contemporary communities?

We believe that all is not lost. There are communities in 21st Century America where the habit of the collective heart is still to be found in abundance. – where de Tocqueville’s North American still exists. As was found by de Tocqueville in the 1830s, much of the distinctive North American spirit of democracy is to be found not in the big cities, but in small and often remote communities. They are also to be found in the temporary convening of people in a safe setting where a community of heart can be established.

In many ways, these are *Island Communities*—not because they are surrounded by water (though some are), but because they are surrounded by protective barriers—be these the barrier of space (communities existing in isolated, rural areas) or the barrier of group boundaries (communities created in a protective environment). If they exist in a remote location, these island communities are usually reached not by boat, but rather by automobile, train or airplane—or even more often today by digital forms of communication. If they exist in a safe space that is created for a short period of time, the island communities are reached by someone signing up to participate in a special, collaborative event.

We reiterate de Tocqueville’s conclusion that habits of the heart are most likely to found in small communities. These can be de Tocqueville’s small and remote American communities. We expand on de Tocqueville by proposing that these habits are often found in island communities that are formed for a short period of time to produce shared ideas and commitments. In making this claim, we join such contemporary observers and commentators on North American life as James Fallows (2018) and David Brooks (2016) in proposing that the collective, collaborative vitality of North American life is often to be found in these island communities—be they permanent or temporary.

This is especially the case when those inhabiting these communities are faced with an imminent challenge: a forest fire, flood, opioid epidemic or mass shooting. As one of our colleagues in a small, isolated California community has noted when working on a team helping citizens evacuate from an

impending collapse of a nearby dam: “there were no Republicans or Democrats coordinating these efforts and filling these sandbags, there were only concerned neighbors and citizens.” There was only a community of heart that transcended all political, ideological and socio-economic barriers.

While collective habits of the heart are probably most apparent under these stressful conditions, we believe that with careful and appreciative examination, the collaborative spirit also exists in the daily life of those citizens who reside in remote, rural communities. They have to rely on one another when addressing the challenge of revitalizing the local arts, finding the funds to repair and expand the local library, restoring a local river, or constructing a strategic plan for restoration of their local economy. Expertise is acknowledged and engaged because the residents of these communities know one another and have experienced the knowledgeable and skillful engagement of other residents of their community when addressing past challenges.

Expertise is established and action is taken based on this expertise. Collective habits of the heart are prevalent. Expertise is shared when people are proactive. They come together to eliminate the source of the stress. They find ways to reduce flooding or forest fires. They obtain funds to rebuild the dam. In these temporary settings, people also find ways to revitalize the arts, expand the library, restore the river, or stimulate their local economy. Temporary systems are established where new ideas can be explored, decisions can be made—and commitments can be established. It is to the nature and dynamics of these temporary systems that we turn our attention in this essay regarding collective expertise.

Expertise Concerning Structure, Process and Attitude

In seeking to identify the nature and dynamics of these temporary systems, we return to our identification of the natural, linkage and need-based sources of expertise to be found in these systems. It is well beyond the scope of this essay to identify all of the sources of natural expertise within contemporary communities. Abundant sources of technical expertise are to be found in mid-21st Century societies. Furthermore, we are not able to identify all (or even some) of the many linkages that can be accessed or needs that must be addressed in contemporary societies.

What can be addressed is the natural expertise needed to create and facilitate collaborative ventures in which collective expertise is being engaged. We specifically propose that these collaborative ventures and the accompanying acceptance and engagement of collective expertise requires the knowledge of a social architect (structural expertise), skill of a group facilitator (process-related expertise), and dedication of a social reformer (expertise related to attitudes). These three roles relate, in turn, to what Goodwin Watson (Watson and Johnson, 1972) proposed many years ago: effective functioning of a project, organization or society require attention to three dimensions: structure, process and attitude.

The first dimension (structure) contains the formal elements of a project, organization or society: the organization chart and reporting relationships, buildings, technologies, official strategic plans, etc. The structures are visible and can readily be articulated. They are the stable, enduring “snap shots” of the organization.

The second dimension (process) contains the ongoing way in which people inside the structure operate. This dimension is best conveyed not through a static snapshot, but rather through a movie that documents the behaviors taking place. The process dimension includes behaviors related to such critical interpersonal functions as communication, conflict-management, problem-solving and decision-making (Bergquist, 2004).

The third dimension (attitude) identified by Watson can't be seen or viewed either as a snapshot or movie. Attitude is felt but not seen. Chris Argyris and Don Schon (1974) offer a comparable distinction between "espoused theory" (what we say) and "theory in action" (what we do). Attitude is inferred from the ways in which members of a project, organization or society communicate with one another, manage conflicts, solve problems, and make decisions. Attitudes are seen but rarely articulated. As the old saying goes: "Watch what they do rather than what they say." This saying can even be directed toward our own attitudes: "Watch what I do rather than what I say."

Attitude concerns how members of an organization or society feel about working in the existing structure and engaging other members of the organization through the use of specific processes. It is important to note that Watson conceives of "attitude" as a dimension of human life that encompasses the dynamics of character and culture. For Watson, attitude includes anything that can't be directly observed (as is the case with structure and process).

If Watson is accurate in his assessment of the key dimensions in any project, organization or society, then diverse sources of expertise are needed to create and maintain a community of heart—be it temporary or permanent. Knowledge regarding structure must be coupled with the facilitation of processes and dedication to specific attitudes. If this expertise is effectively engaged on behalf of temporary systems (as well as permanent systems) then it will have a multiplier effect: specific collective expertise is engaged that enhances the acknowledgement and use of other, collective forms of expertise.

Given this hopeful appraisal regarding creating and maintaining communities of heart, we turn to some specific examples (and recommendations) regarding how structures, processes and attitudes can be effectively engaged. We begin with structures that enhance the recognition and use of collective expertise.

Expertise-Enhancing Structures

In order to enhance the knowledge and perspective base of expertise so that informed action can be taken, we must find other people of like mind who will join with us in our collaborative learning and learning into the future. We find these people in many settings—especially in the organizations with which we work and the communities in which we live. We also find (or create) settings that are comparable to those identified by de Tocqueville in his description of communities where habits of the heart prevail. Equality of opportunity, knowledge and status exist in the community. No one person has all the answers or all the authority. Collective wisdom is encouraged and honored.

As de Tocqueville observed, this is a setting in which vivid and sustained dialogue is found in abundance—based on shared interests and reasons to sustain mutual support. Emphasis is placed on

experience-based and useful action. Most importantly, there is an abiding belief regarding human progress and a shared sense of greater purpose in life. We suggest that the ancient term “sanctuary” captures the essence and heart of these settings and that structures which provide sanctuary will enhance the generation and use of collective expertise. We turn first to the nature of sanctuary and then to a description of several kinds of sanctuaries: temporary systems and collateral organizations.

Sanctuaries

Sanctuaries are the places or times or situations (which are created for us, or which we create for ourselves), in which we can drop out of the busy conditions of life for a few moments. We gather ourselves together in this setting. We restore our integrity and our energies. We focus again on our highest priorities and deepest yearnings. Sanctuary is where we “come home,” where we can love and care for ourselves deeply—and therefore care for others. It is where habits of the heart are likely to prevail.

The Need for Sanctuary: Every civilization has had some kind of sanctuary system. In medieval Europe, there were feast days when no one worked—and all fighting stopped. This was called “The Peace of God.” The church or cathedral was itself a sacred sanctuary. It was forbidden to kill someone who was in a cathedral. In ancient Hawaii, the *heiau* was a place of sanctuary. During a time of war between the tribes, if a man could get to a heiau, he was allowed to stay unharmed for three days. You can still see the heiau called “The City of Refuge” on the Big Island.

There is a hunger for sanctuary: a hunger to talk about it, a hunger to know about it, and most of all a hunger to find it. It is almost as if, in our intense search for all the many kinds of well-being, we have nearly lost one of the most precious kinds of well-being of all. We have lost our ability to find sanctuary—real, true, healing, transforming, and deeply comforting sanctuary—in our lives.

Sometimes the sanctuary is in a small corner of our house; an alter with a crucifix, or a puja table in India with flowers, incense, and a picture on it, or a prayer window looking out into a garden. Sometimes it is a time and a ritual, like evening prayers for the Jew or one of the five times of prayer for the Muslim. Sometimes it is a practice, like stopping in the park to feed pigeons on the way home from work at the end of the day or having a quiet cup of coffee in the staff room of a busy corporation. Not always, but often enough to keep us engaged, these moments take us to a place we call our true home. We are rested and renewed. We say, “Now I am more myself. again.” Sanctuary enables us to stop, hide, get away, rest, and become “more myself again.”

In many ways, sanctuaries are more important today than they were fifty years ago. There is a constant need for sanctuary throughout the history of any society. In most societies at most times, there are a sufficient number of forms and occasions for sanctuary to meet the needs of the society. However, there may be periods of change in which the normal forms of sanctuary are not available, and new ones have not yet been instituted within a society.

During these periods, there will be a felt need for finding new forms, or recovering old forms, of sanctuary. A study of any society may in the future show that there are cycles involving the renewal of old forms of sanctuary and the invention of new forms. There seems to be a great need for sanctuary at

times of rapid change, between eras, or in times of turbulence. We certainly seem to be operating in such a world at the present time.

What Sanctuary Does: The need for sanctuary seems to be established deep within our instinctual lives, in our DNA, deep within our bones, as it were. Every life form, including the planet Earth, lives in cycles (sometimes we call them circadian cycles). As the writer of Ecclesiastes noted, and the folk singer sang: "For everything there is a season and a time for every matter under heaven; . . . a time to keep silence, and a time to speak; . . . a time for war, and a time for peace. [Ecc.3.1-11]" What then are the appropriate seasons for sanctuary and what functions are served by sanctuary when it is found?

First, sanctuary enables us to stop, hide, get away, rest. We all need to stop. We need to stop physically, mentally, emotionally, and perhaps spiritually. Animals seem to spend a lot of time resting. They know how to stop physically. Children do too. So do adults who live near the equator. We northern (or southern) hemisphere adults seem to be the only creatures who have trouble learning to stop and rest. . . at least until we are forced to by illness or age.

Our bodies give us natural times of resting, and these (with a stretch of the imagination) could be called mini-sanctuaries or even nano-sanctuaries. The heart rests between beats, the lungs between breaths. Our days are interwoven with moments of rest, and hopefully reflection. When the day is over, we go into a major physical sanctuary called sleep. We also need to stop being quite so conscious sometimes. We need mental rest. Some call it "veg'ing out," or "zoning out," or just "checking out." But whatever it is, we are "out."

Second, sanctuary enables us to heal, repair, re-group, recover. While we are resting our bodies, minds, emotions, and spirits, we often also heal. Hospitals are great public sanctuaries for healing in the Western world. Originally in many parts of the world (including USA) hospitals served as refuges for the poor and downtrodden. Nuns and nurses ministered to the nutritional and spiritual needs of the have-nots, as well as their physical needs. While the mission of most hospitals has changed in recent times, there still are separate rules for hospitals. There are boundaries. There are expected behaviors. There are ranks and protocols. We know when we are in a hospital.

People also come to sanctuary who have been defeated. Perhaps, there is a renewed interest in sanctuary because we are, in some sense, a defeated society. Sanctuary is clearly and historically a place for defeat. That is where you go to lick your wounds to either come out and fight again or adjust to your defeat. As we have noted, the heiau (city of refuge) in Hawaii was established as a place to stop and rest in time of war. The Kings peace in Medieval Europe accomplished the same purpose. The rule against killing within a Cathedral or church (Murder in the Cathedral), or at other holy places reflects the same issue. When a politician is defeated, or a business leader is fired, they go to a sanctuary to pull their life together again. While the defeat or firing provides an opportunity for grieving and regret, it also can be a place for renewal and re-invention.

Third, sanctuary enables us to find our deep center and reorient to our own deeper compass again. At the heart of sanctuary for many people is the sense of a place, time or situation where the conditions of ordinary living are suspended for a time. This makes sanctuary different from all other parts of life in

time, space, and situation. In these suspended moments, the demands of ordinary life are set aside as are the rules of ordinary life. The heavy weight of blame, guilt, danger, limitations, and sanctions is lifted. Several uplifting forces are added, including (certain kinds of) freedom, openness, possibility, empowerment.

In sanctuary there is the real possibility for renewal and healing at a deep level: nurturance, body, mind, interpersonal, spiritual, situational. There is a real possibility for introspection: seeing oneself as one is (introspection); seeing a situation as it is (extrospection); seeing others as they are, and so forth. There is a real possibility for creative new thinking, being open to new possibilities, being able to envision oneself in new possibilities. There is a possibility of some kind of coming home to one's own truth. There can be a kind of coming to oneself.

Finally, sanctuary enables us to grow by engaging and encountering something inner or other, and then return. There is a close relationship between sanctuary and learning. We have identified sanctuary as refuge, yet sanctuary can also mean challenge and learning. Learning occurs both within the context of what is to be learned, and apart from it. One has to have direct experience, but also reflection from a place of disengagement. The place of disengagement is a temporary sanctuary.

There is a key insight to be offered at this point. We are most likely to be aligned with and benefit from the opportunities offered in a sanctuary when challenge and support are balanced. As Nevitt Sanford (1966) suggested many years ago, we learn and thrive in settings that allow not only for the presence of difficult issues but also for resources that are adequate to resolve these issues. According to Csikszentmihalyi (1990) work and life in an organization or community can often be either quite boring or profoundly anxiety provoking. It is in the threshold between boredom and anxiety that we find rich occasions for personal and collective learning.

It seems that deep, significant personal and collective learning, in particular, involves a balance between support and challenge. Challenge occurs in the process of engaging an issue. Support often means the provision of physical, emotional, social, or intellectual resources. Challenge is added in small manageable increments at a speed with which the learner is able to cope. The learning environment can be engaged in a full-blown sanctuary, or it can be created in a mini-sanctuary in which the full demands of the new learning are not yet applied.

Most importantly, sanctuary is a place where failure can occur—and where learning from this failure can also take place. Sanctuary provides safety. It allows important learning to enter. Publicly identified sanctuaries—places and times labeled as sanctuaries—provide the circumstances in which certain kinds of deeper learning, healing, integrating, meaning-making, and self-communication can take place. One could argue that all learning takes place in some sort of sanctuary-based setting, and that the most important integrative and developmental learning we do as adults occurs both in settings that are embedded in our immediate world) and in sanctuary settings (away from this world).

The Nature of Sanctuaries: Sanctuaries are as old as the human race. Humans, and even animals before them, seem to have always had sanctuaries of one kind or another. At least within a single animal family or species, there are time and places, seasons and locations, when animals of the same species will not

hunt or kill each other. Primitive humans have always had their holy spots, their stone enclosures, their sacred trees, within the bounds of which you were safe, no one could harm you, and to which you also went for healing.

Long before the great European cathedrals were built, there were sacred spaces. There were times and seasons when warfare stopped, and healing could occur. Similarly, there were days (“the feast of fools”) when traditional hierarchies were turned on their head and alternative roles could be explored (not unlike our emerging use of Halloween as a day of pretend and altered roles for adults in many contemporary organizations) (Cox, 1969).

A sanctuary is three things: a place, a time, and a state of mind. A sanctuary is a place of safety or healing or transformation, usually a holy place. Sanctuary is a time when warfare or strife stops, a time when enmity can cease and reconciliation ensue, at least for the moment, and a time for reflection. Sanctuary is a state of mind, in an individual, a group, or a culture. It is a moment of rest, a moment when healing can occur, when we can stop long enough to get our bearings again, to find our center, and to set our course anew.

It is an important moment for an individual or for a society in this mid-21st Century world. Where do we go when we are challenged? Do we seek out false sanctuaries—such as are found in the use of mind-altering drugs, obsessive shopping for un-needed goods, or binge watching and mindless channel surfing? Do we just suffer and remain frozen in a state of inaction and despair? Do we find sanctuary—and then come out renewed and with new insights?

It should also be noted that all Wisdom Traditions insist on sanctuary. A wisely lived and productive life is impossible without sanctuary. On the other hand, the wise heart knows the need for time and solitude and reflection, as a wise gardener knows the need for seasons and care if plants are to grow and flourish, to give nourishment and beauty. Every Wisdom Tradition calls for both time alone and time engaged in community or society or “the marketplace,” alternating the two throughout the days and through a life. Only time alone can provide a deep and intimate relationship with the Self and all that is. Only time in community can hone Self to a mature level of application and service. Only alone can you hear yourself. Only in community can you hear others. The two are actually one.

Joseph Campbell brought this vision to our world during the 1980s with his books (and TV show) on myth (Campbell,1991). The hero typically starts at home, then goes out to be alone in the wilderness (including into sanctuary), faces their self, and then comes back richer. They then shares their riches with the community. Without going out (or inward) there are no riches. Without coming back, there is no value. We leave shallow and disoriented, we come back deeper and oriented to our own true North Star. A mature life (and a mature society) needs both.

When and where do we need sanctuary and how do we create sanctuary? How do we sustain a setting in which de Tocqueville’s conditions are consistently present? How do we create sanctuaries when we wish to stop, hide, get away or rest (the first purpose)? What about the second function of sanctuary (to heal, repair, re-group and recover)? How and where do we retreat for a minute or two from a daunting challenge and come back to this challenge with renewed energy and new insights?

The third purpose of sanctuary— “to find our deep center and reorient to our deeper compass again”— is often controversial. It requires our delving into deeper, more personal, and often more spiritual issues. Certainly, the notion of “coming home to one’s own truth” is foundational to any moment of safety and deep learning. “Mini-sanctuary”—moments of flow—can be found (and created) that embody the fourth purpose. Learning is enhanced and further refined. Actions that derive from this learning can be identified, described, and analyzed (what is often called “meta-learning”).

Temporary Systems

We propose that in many instances, we can create successful sanctuaries in organizational and community settings by establishing temporary systems. Formal sanctuaries clearly are temporary systems; however, temporary systems are also to be found in many other forms. Matthew Miles (1964) noted that temporary systems are to be found throughout our society. Examples of temporary organizational systems that Miles offered at the personal level include psychotherapy, confessional sessions and personal growth programs as temporary systems. At a collective level, temporary systems include carnivals, theater, celebrations, games, retreats, workshops, conferences, task forces, project teams, coffee breaks, and office parties.

Temporary systems can provide short-term, ad hoc settings in which new methods or products are tested out as a “wind tunnel” for new ideas. Other temporary systems provide regularly convened alternative structures, in which all or many members of an organization can identify and solve problems, communication, and manage conflicts in ways that are not usually employed in daily work life. We will turn to these “collateral organizations” shortly. Some temporary systems enable participants to try out a new skill without fear of failure (a “dress rehearsal”). Other temporary systems enable participants to get a taste of the end point to which they are striving.

A key question is appropriate to engage at this point. How do we create these systems in the organizations in which we work and communities where we live? How do we replicate systems that are comparable to the sanctuaries we have just described? How do we find the delicate balance between challenge and support. This question can also be stated in more metaphoric terms. How do we engage what Rianne Eisler (1987) identifies as both the blade (challenge) and chalice (support) when creating a temporary setting? As Eisler has suggested, we mold a chalice to contain the anxiety and direct the energy (support), while also wielding the sword of change and transformation (challenge). The sword helps to mobilize creativity and energy in the first place, while the chalice makes it safe for this mobilization to occur. The chalice and blade allow us to learn and flourish—collective expertise is safely and courageously engaged in this setting.

Collateral Organizations

It is important to note that Eisler’s chalice is not just a metaphoric image. She offers ample evidence that the chalice (as well as the sword) are to be found in many nonhierarchical communities that existed in ancient European communities. Graeber and Wengrow (2021) have more recently shown how nonhierarchical systems have also operated over many centuries in societies located throughout the world (including Aboriginal American societies). Furthermore, many of Graeber and Wengrow’s societies

set up nonhierarchical systems on a temporary basis—often related to seasons of the year or specific community functions. We propose that Eisler’s chalice can be found in certain contemporary systems—and these systems are often temporary (in alignment with the societies identified by Graeber and Wengrow) These systems are called Collateral Organizations—and they hold the potential of providing the heart-based conditions identified by de Tocqueville.

Purposes: Collateral organizations are used to achieve two primary goals. First, they provide an opportunity for members of an organization to think “outside the box” and lean/learn into the future. Second, collateral organizations help those involved to identify and either resolve or manage challenging issues that have not been addressed in a satisfactory manner via the “regular” way in which the organization operates. A new organization doesn’t have to be created, nor do new people have to be brought into the organization. Only heart-based habits are required when establishing a collateral organization.

The leaders of contemporary organizations often create task forces, project teams, ad hoc committees, quality circles and pilot projects as a way of getting around seemingly intractable problems. They might even transform their organization by imposing a matrix design so that multiple perspective can be brought to a set of recurring problems. These initiatives are often quite valuable in helping to open the doors and windows of the organization so that some freedom can blow in. However, they don’t meet all of the needs that can be served by a collateral design. They simply do not provide enough freedom nor encourage the kind of creative, multi-perspective work that is being engaged in a temporary setting (such as a collateral organization) that is set up with different norms, ways of interpersonal engagement, and even assignment of leadership and facilitation functions.

The collateral organization is unique in that it usually is not populated just with experts who purportedly are best able to address a specific issue; rather, the collateral organization typically involves a whole host of people (often the entire organization). It seems that the intractable issue often is intractable precisely because it is not clear who the experts really are with regard to this specific issue. Unlike most daily challenges that have clearly defined parameters and solutions that are readily accessible to the “right” people with expertise in a specific area, major issues are often multi-tiered and operate in what Miller and Page (2007) call a rugged and dancing landscape. All hands must be on deck when an organization or community faces such a challenge. Who knows where the answer can be found?

Establishing a Collateral Organization: The following steps are typically taken in forming a collateral organization. Leaders of an organization or community must first acknowledge that the usual way of doing things is not necessarily of greatest value when applied to certain types of institutional challenges. It is important to emphasize that this doesn’t mean that the organization or community will abandon its regular way of operating (to be replaced by the new collateral organization): “we will still hold on to our tried-and-true, proven way of being as an organization. But we will be adding something.” We can hold on to the old while embracing the new. This is the magic of collateral designs.

Second, a set of values and a compelling vision must be articulated concerning what the collateral organization must do if it is to be successful. As we have already mentioned, a collateral organization should not be focused on a specific problem. Rather it should provide a new approach to the

identification and management or resolution of a cluster of interrelated problems that have eluded successful management or resolution via the standard mode of operation in this organization. Collateral organizations are intended to address what Miller and Page (2007) call complex issues. While complicated issues involved many parts, complex issues involve many parts that are intricately interwoven. Intractability usually concerns complexity rather than complication and is often best addressed through the use of a collateral system that operates in a new way that introduces unique perspectives and practices.

The third and fourth steps will vary quite a bit depending on the nature and purpose of the collateral organization. The third step concerns specification of measurable objectives, along with specification of assigned tasks. This step might be inappropriate if the collateral organization is intended as an “open space” for consideration of multiple problems as they emerge. An open space is particularly appropriate if this collateral organization is to be a safe place where a whole host of lingering problems can be identified and discussed. The fourth step concerns the people who will be invited to participate in this collateral organization. At one extreme we find the collateral organization that is set up specifically for members of the C-Suite or perhaps from those from the C-Suite together with members of the governing board. At the other end is the collateral organization that is open to all members of the organization or community (and perhaps even stakeholders both inside and outside the organization or community).

The final (and perhaps most important) step is establishing the ground rules (norms) for operation of the Collateral organization. How are people in this organization expected to treat one another? What is the nature of leadership and facilitation for this organization? It is also critical to establish the boundaries between this collateral system and the standard, daily operating system of the organization. There are also important boundaries to be established regarding what can be shared outside the collateral organization (norms addressing confidentiality) and how insights and recommendations coming out of the collateral organization will be shared (if at all) with specific stakeholders (norms addressing the relative transparency of the collateral organization).

Variety of Collateral Organizations: collateral organizations can last for quite differing lengths of time and be held in diverse settings. They might be one to two hour “huddles” that are held at the worksite. They begin or end each workday or bring a week of work to an end on Friday afternoon. The huddle can provide an opportunity for a candid review of services provided to patients in a dental office or plans for the next week of menus in a restaurant. Facilitation of the huddle can rotate among all employees (serving as an informal leadership development initiative).

The collateral organization is more likely to last a day or two and be held away from the worksite (often in a retreat setting). On occasion, the collateral organization lasts for a week or longer. However, this rarely is done and is not recommended—for it is hard to sustain a distinctive way of operating for a lengthy period of time. The long-lasting collateral organization begins to either resemble the standard way of operating or take on its own rigidity of structure, process or culture.

Facilitation of the Collateral Organization: Standard group management tools can be deployed in facilitating the operations of a collateral organization. These tools include those that encourage “out-of-

the-box” thinking (so-called “divergent” methods)—such as brainstorming. They also include “convergent” tools that move a group toward consensus—such as the Delphi technique that provides progressive focusing of group members (through successively collated judgements by group members regarding a specific issue). Other traditional facilitation tools include the setting of ground rules, delegating roles, providing breaks, and taking notes (usually on a flipchart or through use of power point). Most importantly, group facilitation should include periodic review of ongoing group processes and meta-planning (finding ways to collect ideas for upcoming meetings that enable thoughtful consideration of each member’s ideas).

Even more powerfully structured modes of facilitation might be engaged to ensure that the collateral organization can operate in a truly unique manner. The talking stick (which was an aboriginal tool of democracy) might be used to ensure that everyone in the organization has an opportunity to be heard. Each person who has just spoken is “free” to hand the talking stick to anyone whom they invite to share their own perspective and contribute their own ideas. Variants on the talking stick include simply going “around the circle” with each group member providing their idea regarding a specific issue. This circle technique can be made more interesting if each member has to contribute a new idea that has not been previously mentioned. Several rounds will often produce very interesting results. This “divergent” technique is often preferable to brainstorming in that it ensures that creative thinking is not dominated by one or two group members.

An even more demanding tool can be engaged. This is a divergent process like brainstorming and the group circle process I have just described. Originally engaged by George Prince, this process (called spectrum analysis) is particularly well aligned with the purpose of collateral design. Through his organization called *Synectics*, Prince offered a spectrum perspective that might today be called “appreciative.” It is assumed in a spectrum analysis that there is at least the seed of a good idea embedded in everything that is suggested. All ideas can be placed somewhere on a line (spectrum) from great to poor—it is not either/or. This being the case, every person who speaks up must first indicate three reasons why the idea offered by the previous speaker can be viewed as a positive contribution. Frequently, when this restriction is imposed, the collateral participants end up building on each other’s ideas rather than offering opposing suggestions. If a diverse population of participants is invited to this collateral setting, the spectrum analysis is likely to yield particularly interesting, innovative—and even “break-through” outcomes.

We can offer yet another example of how a collateral organization might look quite different from a traditionally operating organization. In this case, the facilitation addresses the differing perspectives held by subgroups in the collateral organization. Originally used as a conflict-management tool, an intergroup perception process requires that a specific subgroup (I will call it “A”) produce a list of its own distinctive characteristics, a list of what it believes are the distinctive characteristics of the other subgroup(s) is (are) (Group B, C etc.) and a list of what it predicts the other subgroup(s) are likely to include on their list of Group A’s characteristics. The same assignment is given to each of the other subgroups. These lists are shared and discussed. In many ways, this process builds on the theory of mind I identified earlier in this essay. A much richer (and more accurate and constructive) theory of mind can be built collectively through the use of this process—especially if it is engaged early in the life of a

collateral organization. This tool is of particular value when the collateral organization is composed of participants from different “camps” and polarizations.

Future Search: There are a wide variety of more comprehensive models regarding the design of a collateral organization. One of the most notable of these models is called “Future Search.” Originally developed by Marvin Weisbord, a noted organization consultant, Future Search is a planning meeting procedure that is task focused. It builds on the basic principle that the meeting (collateral organization) should bring in a large number of people (as many as 100) from diverse backgrounds. In this way, the “whole system” is represented when a specific problem is being addressed.

Typically held over several days, Future Search begins with creating a picture of the past (often graphically portrayed on a long sheet of butcher paper). As is the case with most of the Future Search activities, small group discussions are held first. Report outs from these groups to the whole group follow (thus ensuring the initial contributions of all participants in the small groups). Bringing the focus to present time issues, a “mind map” is often produced (once again often making use of graphic portrayals on a large sheet of paper). Butcher paper often “reigns supreme” at a Future Search meeting.

The mind map includes not just current issues, but also anticipated trends as viewed from the diverse perspectives offered by Future Search participants. Given these varying views of the future, participants break again into small groups to imagine themselves in the near (and more distant) future. What would their life and work be like in a very positive future—and how would they get to this future? Consensus is reached in the small groups and their findings are reported out to the entire group. The primary task of the Future Search group is now to find “common ground” and to build an action plan that enables participants to take steps required (or at least identified) as a way to reach a shared positive future. Connections have been created during the Future Search process that make possible the ongoing collaboration among participants in working toward realization of the steps envisioned during the Future Search meeting. Follow-up activities and “check-ins” are identified, and the Future Search meeting is concluded.

Several features of a collateral organization are deeply embedded in the Future Search process. These include new ways in which members of this organization interact with one another and in which planning is being engaged. Future Search also incorporates new ways in which leadership is being exhibited. Furthermore, Future Search encourages an appreciative perspective regarding contributions that can be made by each participant. Perhaps of greatest importance is the “whole system” perspective adopted by Future Search. This perspective contrasts with the isolated, silo-based perspective to be found in most regular organizational operations. This “whole system” perspective of Future Search interweaves with a focus on the future (as the title of this method implies)—yielding an even more distinctive way of operating as a temporary collateral organization.

Open Space: A quite different model of collateral organization design is to be found in the more recent enactment of a comprehensive design called Open Space. Originally offered by Harrison Owens (yet another noted organizational consultant), Open Space provides a much less structured process than is the case with Future Search for addressing the diverse issues facing a specific organization or community. Like Future Search, Open Space is a method for organizing and running a meeting or multi-

day conference where participants have been invited to focus on a specific, important task or purpose. Unlike Future Search, Open Space is participant-driven and less organizer-driven.

Pre-planning remains essential in preparing for an Open Space meeting. However, less pre-planning is needed than when Future Search is being engaged. The lack of substantial pre-planning is in keeping with an emerging perspective in the sciences regarding complex and chaotic systems that are “self-organizing.” As we now know is the case with many living systems, few hierarchical controls are present in the operation of Open Space. This type of collateral system is to some degree “self-organizing.” As noted, Open Space participants “drive” the agenda through the decisions they make throughout the meeting regarding the topics to be addressed and the extent to which any one topic sustains their attention.

Given the self-organizing nature of “open space” meetings, it is important that some “container” (Eisler’s chalice) be present throughout the meeting. This Open Space container is a set of assumptions that provide a foundation for this distinctive collateral organization. I like to think of these assumptions as representing (and enforcing) the “spirit” of Open Space. Following is a typical set of Open Space assumptions:

Whoever comes to this Open Space event is the right person (an appreciative perspective)

The topics being addressed are those that are most important, and those about which participants have a passion.

Whenever a particular topic emerges, it is the right time

When the dialogue regarding a topic is over, it's over

Whatever happens is the only thing that could have happened

There is one Law: the “Law of Two Feet: Shoes are made for walking” (participants should feel free to move to another group and another topic)

With these assumptions in place, the Open Space facilitator or facilitation team become much less visible as the Open Space process begins. It is important to note that Open Space facilitators do play a role, but it is one that does not drive the agenda. Along with the guiding assumptions, the facilitators are providing the informal container for this collateral organization. They are “holding a space” for participants to self-organize. The facilitators are definitely not micro-managing either activities or conversations; however, they are attending carefully to ongoing interactions among Open Space participants and will gently intervene if the informal leader of a small group gets heavy handed or if there is any kind of pressure for participants to join (or leave) a particular group.

Unlike what we find in Future Search, the agenda and anticipated outcomes of an Open Space meeting can’t be fully specified prior to the formation of this collateral organization—precisely because of the self-organizing and evolving nature of any specific Open Space meeting. That is why I previously mentioned that any requirement is controversial if a collateral organization is to specify desired outcomes or leadership roles ahead of time. Open Space meetings operate as a dynamic, complex (and often chaotic) living entity. We can’t anticipate what exactly is going to happen or which issues are to emerge and be addressed by Open Search participants. As noted in the basic assumptions I offered, there is an abiding belief that the right topics will emerge and will be handled by the right people.

One other important distinctive needs to be drawn. As in the case of Future Search, Open Space meetings don't need the experts. However, it is not about numbers or the diversity of Open Space participants. It is about the assumption that the right people are there. These people just need to be agile of thought as well as steadfast in their commitment to furthering the welfare of the organization or community they represent. While those initiating Open Space meetings might not be considering task-based outcomes, there are several process-based outcomes that are meaningful and ultimately critical to the success of an Open Search meeting. These outcomes have to do with safety, trust, courtesy—and appreciation. The assumptions identified at the start of the meeting and reinforced by Open Space facilitators throughout the meeting ensure or at least create conditions for realization of these process-oriented outcomes.

As in the case of most collateral organizations, Open Space meetings are usually convened for several hours or for a few days. As in the case of Future Search, much of the work in Open Space is done in small groups—with occasional report outs to the entire group. Unlike in Future Search, the small group discussions are often quite fluid in an Open Space meeting. Participants easily leave one group and join another—or start a new group that will address a new topic or engage an existing topic in a new way. Butcher paper and flip charts once again “rule the day.” Updates of small group topics and initial points of inquiry related to these topics are posted on these charts along with the place and time where and when this group will be convened.

We find that there are two critical structural components of Open Space that should not be overlooked. First, someone in each small group should be designated as the recorder to take notes (often writing them on a flip chart). Second, at the end of each or at least most open space sessions, a summary document should be compiled from the notes taken by the recorder in each of the small group. This summary is distributed as a paper or electronic document to all participants. The distributed documents are used as the basis for prioritizing issues, identifying next steps, and continuing work beyond the meeting itself.

This critical component, in turn, points to one other structure that is introduced at the end of the Open Space meeting: all or most of the small groups report to the whole group on follow-up activities. If one of the assumptions I listed above is accurate—that passion is inherent in the topics being addressed-- then this passion (shared by Open Space participants) should extend beyond the Open Space meeting. The passion should motivate continuing attention to the issues being identified and addressed at the Open Space meeting. Without extensive formal monitoring, follow up activities should “self-organize” and important actions should emerge from this collateral organization.

Along with other collateral organizations, the Open Space format can produce startling results and yield needed reform in the way that intractable problems are being viewed and either managed or resolved. The fresh breeze of freely generated ideas, perspectives and practices just might circulate around an existing organization or community following a Future Search or Open Space meeting. This fresh breeze might be welcomed as it swirls around the heads and hearts of those living and working in the organization or community. It should also be noted, however, that heads and hearts might be troubled by this breeze. Members of the organization or community might remain intransigent and resentful of the “non-realistic” outcomes of this “chaotic” and wasteful collateral meeting. Thus, the new viewpoint might be both welcomed and rejected.

We have indeed found that participants in many collateral organizations face ambivalent attitudes when they return to their home organization or community. Nevertheless, long after the Open Space (or Future Search) meeting concludes, its participants (and those affiliated with the participants) might find that the heart-based habits of this collateral organization will linger. They are prepared for the ambivalence and are likely to be persistent in their attempts to bring about reform in their organization or community. Unlike those who gather ideas from the passive attendance at a traditional conference or training program, the participants in collateral organizations are actively involved in the creation of the new ideas and are engaged in co-active learning with other participants. The heart-based habits to be found in these settings are invaluable. However, are they enough?

Expertise-Enhancing Processes

There are many process-based interpersonal and group tools and strategies that help to create and maintain a community of heart--and enhance the emergence and use of collective expertise. These include the cluster of communication tools involved in Active Listening (Bolton, 1986; Bergquist and Mura, 2011) and strategies that encourage the generation and integration of diverse perspectives—such as those associated with Bohm dialogue (Bohm, 2004). We propose, however, that there are a specific set of process-based tools and strategies that are particularly effective in the facilitation of collective expertise and that incorporate these other tools and strategies.

These emerge from and cluster around something called an *Appreciative Perspective* (Bergquist, 2004; Bergquist and Mura, 2011). What is the nature of such a perspective? In essence, an appreciative perspective concerns a willingness to engage with other people from an assumption of mutual respect, in a mutual search for discovery of distinctive competencies and strengths—areas of expertise--, with a view to helping them fulfill their aspirations and their potential. This simple statement might at first seem to be rather naive and idealistic, but at its core it holds the promise of helping to encourage and make use of collective expertise.

Understanding Another Person

The term appreciation itself has several different meanings that tend to build on one another; however, appreciation refers first to a clearer understanding of another person's perspective. We come to appreciate the point of view being offered by our colleague and with this understanding, we can receive and build on their expertise. The tools of active listening are engaged to enable this understanding to take place. We offer a paraphrase of what another person has said so that we might not only benefit from what they have said, but also gained greater insight into their own perspectives by testing the accuracy of what we have heard (as processed through our own perspective).

This appreciative tool arises not from some detached observation, but rather from direct engagement. One gains knowledge from an appreciative perspective by “identifying with the observed.” (Harmon, 1990, p. 43) Empathy is critical. One cares about the matter being studied and about those people with whom one is collaborating. Neutrality is inappropriate in such a setting, though compassion implies neither a loss of discipline

nor a loss of boundaries between one's own perspectives and those of the other person. Appreciation, in other words, is about fuller understanding, not merging, with another person's perspectives. It is about being open to, not necessarily uncritically embracing, another person's apparent expertise.

Valuing Another Person

Appreciation also refers to an increase in worth or value. A painting or stock portfolio appreciates in value. Van Gogh looked at a vase of sunflowers and in appreciating (painting) these flowers, he increased their value for everyone. Van Gogh similarly appreciated and brought new value to his friends through his friendship: "Van Gogh did not merely articulate admiration for his friend: He created new values and new ways of seeing the world through the very act of valuing." (Cooperrider, 1990, p. 123)

Peter Vaill recounts a scene from the movie *Lawrence of Arabia* in which Lawrence tells a British Colonel that his job at the Arab camp was to "appreciate the situation." (Vaill, 1990, p. 323) By appreciating the situation, Lawrence assessed and helped add credibility to the Arab cause, much as a knowledgeable jeweler or art appraiser can increase the value of a diamond or painting through nothing more than thoughtful appraisal. Lawrence's appreciation of the Arab situation, in turn, helped to produce a new level of courage and ambition on the part of the Arab communities with which Lawrence was associated.

When we seek out a fuller and more accurate assessment of another person's perspective—though the use of active listening—then we are "valuing" what they have to contribute. When we fully appreciate our colleague's unique perspective in the engagement and use of collective expertise, then we have raised their worth as contributors to this collective effort. Furthermore, we may have seen them, understood them, and valued them in ways that neither our colleague nor other participants in this collaborative effort might have seen them before—thus opening new vistas for their growth and further maturation of the collaborative venture. Paradoxically, at the point that someone is fully appreciated and reaffirmed, they will tend to live up to their newly acclaimed expertise, just as they will live down to their depreciated sense of expertise if constantly criticized and undervalued.

Recognizing the Contributions of Another Person

From yet another perspective, the process of appreciation concerns our recognition of the contributions that have been made by another person: "I appreciate the efforts you have made in doing research regarding this matter." We are "catching people when they are doing it right" (rather than catching them "when they are doing it wrong"). This tool of appreciative requires not only that we note that what they have just said or done is helpful on behalf of the collective venture, but also an articulate statement regarding Why it has been helpful: "When you said xxxx, I noticed that we have become more xxxx and have achieved xxxxx). Appreciation is not only about what, but also about why. We learn more about the ongoing process of a group when the impact of a specific statement or action is traced. The collaborative group learns from this appreciative tracing of cause and impact.

Appreciation is exhibited in a more constructive manner through the ongoing interaction between those engaged in the building of collective expertise. It involves mutual respect and active engagement, accompanied by a natural flow of feedback, and an exchange of ideas. More specifically, appreciation is evident in not only the processes being engaged, but also the attitudes accompanying these appreciative tools regarding the nature and purpose of work done on behalf of building collective expertise.

These are the three most common uses of the term appreciation. We appreciate the expertise offered by other people through seeking to understand them, through valuing them, and through being attentive and thoughtful in acknowledging their ongoing contributions to the organization. The appreciative perspective can also be engaged in three additional ways that are distinctive—yet closely related to the first three. These three appreciative strategies offer a bridge between expertise-enhancing processes and expertise-enhancing attitudes.

Establishing a Positive Collective Image of the Future

Appreciation can refer to the establishment of a positive image of the future among those engaged in the building of collective expertise. We grow to appreciate our collective effort by investing it with optimism. We invest it with a sense of hope about its own future and the valuable role potentially it plays in our organization or society. Effective appreciative participation in a collaborative venture must be “not only concerned with what is but also with what might be.” (Frost and Egri, 1990, p. 305) We come to appreciate our own role and that of other people with whom we are participating regarding the contributions we make jointly in helping to realize these images, purposes and values.

An appreciative perspective is always *leaning into the future*. There is consistent and frequent attention to what will happen (anticipation) and what should happen (aspirations) in the days and years ahead. Rather than focusing conversations on reconstructed narrative of the past, the conversations are directed toward construction of a new narrative concerning the future. While we appreciate that which has been successful in the past, we don't dwell with nostalgia on the past, but instead continually trace out the implications of shared expertise, acquired wisdom and past successes regarding our vision of the future. We will have much more to say about this appreciative perspective in the next section of this essay—for it provides the foundation for an expertise-enhancing attitude as well as being a key to expertise-enhancing processes.

Recognizing Distinctive Sources of Expertise

Appreciation in a collaborative setting also refers to recognition of the distinctive expertise and potentials of people working within this setting. Even in a context of potential competition, appreciation transforms envy regarding the other person's expertise into learning from this expertise. Personal achievement and individual contribution of expertise is transformed into a sense of overall purpose and the collective valuing of this expertise. The remarkable essayist Roger Rosenblatt (1997, p. 23) revealed just such a process in candidly describing his sense of competition with other writers. He suggests that the sense of admiration for the work of other writers can play a critical role in his own life:

Part of the satisfaction in becoming an admirer of the competition is that it allows you to wonder how someone else did something well, so that you might imitate it—steal it, to be blunt. But the best part is that it shows you that there are things you will never learn to do, skills and tricks that are out of your range, an entire imagination that is out of your range. The news may be disappointing on a personal level, but in terms of the cosmos, it is strangely gratifying. One sits among the works of one's contemporaries as in a planetarium, head all the way back, eyes gazing up at heavenly matter that is all the more beautiful for being unreachable. Am I growing up?

An appreciative culture is forged when an emphasis is placed on the realization of inherent potential and the uncovering of latent strengths rather than on the identification of weaknesses or deficits. People and organizations “do not need to be fixed. They need constant reaffirmation.” (Cooperrider, 1990, p. 120)

Acknowledging the Value of Diversity

A final mode of appreciation is evident in a collaborative setting when efforts are made to form complementary relationships and recognize the mutual benefits that can be derived from the cooperation of differing constituencies and the valuing of varying sources of expertise. This appreciative strategy requires not only the recognition of diverse perspectives and differing backgrounds, but also the engagement in processes (such as Bohm-based dialogue) that brings about a search for common understanding, non-judgmental acceptance, and potential integration of diverse perspective and accompanying practices.

Yet another paradox is found in the engagement of this appreciative strategy. A culture of appreciative diversity actually provides collective integration (the glue that holds a system together) while the organization is growing and differentiating into many distinctive units of responsibility (division of labor) and geography. (Durkheim, 1933; Lawrence and Lorsch, 1969) The appreciative perspective is particularly important in the era of diversity, when there are significant differences in vision, values or culture among people participating in a collective venture. (Rosinski, 2010)

Expertise-Enhancing Attitudes

Expertise-enhancing structures and processes, embedded in a community of heart, lead to and are accelerated by an attitude of appreciation. What then is an attitude of appreciation? First, it is important to note that attitudes concern the way in which we see the world in which we live and work. Our attitudes guide the narrative we construct about this world and our reason for being in this world. This narrative can be embedded (and stuck) in the past and in the barriers that make an attractive future seem impossible to achieve. As we have already noted with regard to appreciative processes, the narrative can instead be constructed around a desirable future to which our collective energy and expertise can be directed.

Dynamic Constructivism

A framework we call Dynamic Constructivism resides at the heart of an appreciative narrative concerning the future (Bergquist and Eggen, 2011). Most importantly, we are enhancing the expertise being offered by our colleague and ourselves when we engage in dynamic constructivism. We construct a dynamic, evolving reality in which expertise is being engaged from all sources and is being deployed on behalf of a better future. A dynamic constructivism moves well beyond the stability of traditional, broad-based societal and cultural perspectives regarding “legitimate” or “illegitimate” sources of expertise. The emergence of a dynamic constructivist perspective represents a revolutionary change in the true sense of the term. Expertise resides in the collective rather than in just the individual “expert” who receives our attention only because they possess power, prestige or position.

Language, narratives and self: Story and performance are hallmarks of dynamic constructivism. We live in a world of constructed realities that are constantly shifting and populated by language, semiotics and narratives. Language is no longer simply considered a handmaiden for reality, nor does it construct a permanent (or at least resistant) reality. Furthermore, language is not a secondary vehicle we employ when commenting on the reality that underlies and is the reference point for this language. Dynamic constructivists take this analysis one step further by proposing that language is itself the primary reality in our daily life experiences. Language, originally and primarily relationship-based, assumes its own reality, and ceases to be an abstract sign that substitutes for the “real” things.

While traditional notions about expertise are based on the assumption that there is a constant reality to which one can refer (through the use of language and other symbol/sign systems) and an assumption that there is a constant societal base for our acceptance of expertise, dynamic constructivism is based on the assumption that the mode and content of discourse and the relationship(s) that underlie this discourse are the closest thing we have to “reality” and are the invaluable source of collective expertise. We are constantly reconstructing our reality because this reality is based on the specific relationship through which we are engaged via our discourse. Expertise is constantly shifting because reality is itself changing.

Collaborative expertise and truth: As Ken and Mary Gergen (2004, p. 19) proclaimed, “truth is only found within community.” More specifically, they would suggest (Gergen and Gergen, 2004, p. 25) that truth is found in trusting relationships: “constructivism favors a replacement of the individual as the source of meaning with the relationship.” Even more to the point, truth is found in dialogue – and disagreement. There is an insistence that we respect and learn from other people: “one is invited into a posture of curiosity and respect for others.” Of greatest importance is the respect we show for the distinctive expertise which people from all backgrounds bring to the dynamic construction of a desirable future. According to the Gergens (2004, p. 21), a constructivist framework:

is . . . likely to favor forms of dialogue out of which new realities and values might emerge. The challenge is not to locate “the one best way.” But to create the kinds of relationships in which we can collaboratively build our future.

We are not confined to traditional sources of expertise in such a setting (where an appreciative attitude is prevalent), because the relationship and the discourse is itself reality and the primary source of expertise.

Societal Narratives of Our Time: We are often distant from many of the most important events that impact on our lives. We live in a complex, global community and have many connections to a vaster world. Most importantly, we may no longer have direct experience of (nor can we have much influence over) this world. As a result, we often share narratives about things and events rather than actually experiencing them. Language itself becomes the shared experience. This sense of a constructed reality that is reinforced by narrative and conversation is a starting point for dynamic constructivism. The key point with regard to a dynamic constructivism is that each specific conversation is itself a reality.

Shared narratives and language are where we actually meet with other people and our society. More than ever, our work groups and organizations are based on and dependent on these dynamic interpersonal conversations and shifting, context-based narratives. Most people, resources and attention in present-day work groups and organizations are devoted not to the direct production of goods or direct provision of services, but instead to the use of verbal and written modes of communication about these goods and services. Given these conditions, storytelling and narrative are central to 21st century life and form the foundation for collective expertise. Stories are the lifeblood and source of system maintenance in both personal and organizational lives. The construction of stories about person, group and organizational successes and failures is critical to the processes of change and transformation at any of these three levels. It is in the stories that expertise is most effectively shared in a compelling (and authentic) manner.

A Vision of the Future

We have dwelt on the nature of dynamic constructivism because it plays a central role in the creation of a shared attitude regarding the purpose for and desired destination of collective expertise. Why, in other words, are we willing to work together and find “reality” within the sharing of diverse perspectives. This is hard, demanding interpersonal work—why do we do it. This engagement in collaboration and the building of collective expertise requires the accompanying construction of a compelling and guiding vision of the future. Communities of heart are sustained by just such a vision.

Put simply, collaborative expertise is guided by and motivated by an articulate vision of the future that is persuasive and motivating. Expertise is brought forth and accepted because people are “hungry” for a dream or image of a better world that is saturated with justice, equity and prosperity.

The Nature of Visionary Leadership: Visionary leaders like Abraham Lincoln often were born in poverty and are self-taught—the mantle of expertise did not come “naturally” to them. Other visionary leaders such as Susan B. Anthony (and the other Seneca Falls advocates for women’s rights) and Martin Luther King (and the other civil rights leaders of the 1960s) grew up in a world that discriminated against the expertise that they have to offer (or at least against the expertise offered by people who are “not of their kind”).

The visionary stories often contain moments of personal doubt and spiritual despair. We see this in the inspiring stories of Joan-of-Arc and Mother Teresa. Visionary stories often contain elements not only of doubt and despair, but also of wisdom and of courage. Visionary leaders convey stories of sacrifice, tribulation and triumph—having parted the Red Sea or dwelled in the desert so that they might enter into a land of milk and honey. Ironically, in many instances they have led their people to a land of milk and honey but have not been able to enter this land themselves (Moses, Lincoln, Gandhi, John and Robert Kennedy, Martin Luther King).

The key to wholehearted acceptance of and sustained support for a visionary leader resides in the identification of a compelling story from the past that bridges to the future, or that encompasses fiscal and social responsibility. It is a sacred story that successfully conveys secular values. While this story often involves something about the visionary leader's own life and struggles, it must also resonate with and align with the stories and personal aspirations of those hearing or reading this story. The visionary leader's own expertise must align with the hopes (not just the fears) of those whom this leader wishes to guide into a promising future. There is a phrase which usually reads: "think globally but act locally." This same sentiment, slightly revised, can apply to visionary stories: "make them personal and local, but be sure that they speak to a much larger constituency."

The Nature of Visionary Settings: Given that visionary leadership is dependent on the right place and the right time, it is also important that the vision be articulated at the right time and in the right place. While Lincoln's Gettysburg Address still appeals to us today, it is profound in large part because it was given at a commemoration ceremony for those soldiers who died during the bloody battle at Gettysburg. Lincoln is literally "consecrating" the ground where these young men were buried. Martin Luther King's "I have a dream" speech was similarly given on a particularly auspicious occasion (a major civil rights march on Washington D.C.) and at a very patriotic location (facing the Lincoln Memorial). The visionary leader must pick the special time and place when offering a visionary statement.

Where and when does the visionary leader find this special place and time? What is the nature of a setting in which a vision of the future can be created that builds off collective expertise, that is collectively embraced and that provides guidance for the articulation and use of shared expertise? These are critical questions. The answer resides partially in the descriptions we have already provided regarding structures that enhance collective expertise. We wish to expand on these descriptions by proposing that there are five primary criteria with regard to the nature of an effective setting for establishing a collective vision of the future. These five criteria tell us something about when and where we should not only offer a vision, but also invite in collective expertise. We will first briefly identify these criteria and then suggest how these criteria help us identify an appropriate time and place for collective expertise and vision.

First, any collective expertise and any statement of vision must be created and sustained by an entire social system—not just its leader(s). Collaboration is critical. As we noted with regard to Open Space technologies, the right people are always there to build the future—it is only a matter (as the Gergens propose) of facilitating a shared exploration of the "truth." Expertise comes in the collaboration, rather than in the knowledge or skill of any one person. The isolated leader of vision is speaking only to the

wind if they have no appetite for constructive engagement with other people. A vision that is not subject to ongoing dialogue and revision is of no value to anyone.

Second, the vision statement must be offered within a context of appreciation for past accomplishments and present-day contributions. All too often the visionary leader (especially if new to this role) will ignore or offer a critical perspective on past achievements rather than honoring these achievements and seeking to learn from them. We must always remember that someday in the near future, we will be the relics of the past and may be overlooked by the next generation. We will be the visionary leader who holds a vision that is now out-of-date and whose accomplishments on behalf of this vision are no longer fully appreciated.

Third, the statement of vision must be coupled with a statement of mission. Whenever a vision of the future is generated, it must be coupled with a clear commitment to something that is not about the future, or even exclusively about the present. It must be coupled with an enduring sense of mission. Expertise that operates independent of mission is rarely either heard or engaged over an extended period of time. When not aligning their expertise with mission, the “expert” is likely to hear something like the following: “nice to know but not really relevant to what we are working on today.”

The expert should pause before offering their insights and advice in order to ask themselves the following: “What do we do as a family, clan, organization, or social system that remains fundamental and unchanged, and what do I have to offer that aligns with that which is fundamental and unchanging?” At an even deeper level, we might ask as an expert: “What do I have to offer that is key to our survival?” From an appreciative perspective, we must always look toward the future through the lens of foundations and continuity. What is our “business” and how does our vision for the future relate to this business? This might seem to contradict what we suggested earlier regarding a focus on the future; however, this is not the case. The focus should remain on the future, but the lens through which we view the future should be aligned with our mission and fundamental reasons for being present in our world. We attend from our mission to our future.

The fourth criterion concerns the relationship between vision and values. How does our vision of the future relate to the fundamental values of this family, clan, organization or social system? What will and what won't we do in order to realize our dream for the future? Martin Luther King not only offered us a dream—he also insisted that this dream be realized through a set of values based on nonviolence. Similarly, Lincoln's statement of gratitude for the sacrifice made at Gettysburg is based on his firm commitment to preservation of the union. The “ends” (vision) never justify the use of inappropriate or unethical “means” (values). Expertise might be directed toward the means, but it should always be offered on behalf of some valued outcome that is shared by all involved in the collaborative venture-- otherwise the expert is vulnerable to the lure of personal power (as a replacement for collaborative support).

Fifth, the vision statement and expertise should relate to some formally identified sense of purpose: what difference does our family, clan, organization or social system in the life of people living in this community, country or world? What social purpose are we serving and how does this purpose relate to our vision of the future? Our vision can be self-serving or even profoundly destructive with regard to

social purpose (as in the case of Hitler’s vision). It is important that vision be aligned with a fundamental social purpose. Expertise that is offered in a manner that is unrelated to social purpose is (and should be) ignored.

Thus, while a vision statement will change over time and expertise will sometimes be heard and at other times be ignored, the mission, values and social purposes tend not to change, or they change very slowly. While the vision is the wind in the sails that propels a vessel, the mission, values and social purposes provide the anchor, keel and rudder that keep the ship afloat and properly aligned. Furthermore, even though thoughtful (expert) advice and a compelling vision statement may come out of the mouth of a visionary leader, it ultimately requires collaboration and appreciation if the expert advice and vision are to be truly owned by those who must make use of the advice and enact this vision.

Several conclusions regarding appropriate time and place can be extracted from these five criteria. First, the expertise and vision statement should be offered alongside clearly articulated statements regarding mission, values and purposes. The vision itself should build on many conversations, the sharing of stories (not just the visionary leader’s stories) and the identification of moments of “greatness” in the past history and present realities of the organization. Expertise is valued, and visions come alive and help guide collective action when they are generated and articulated under these conditions (place and time).

The Challenges and Irony of Expertise and Vision: If brilliant expertise is evident and a compelling vision is generated, then what do we do about this expertise and vision? We must do more than applaud the compelling advice-giver or visionary speech-giver. We must do more than walk away, inspired to do good—for at least a day or week. So-called “motivational” speakers and renown “experts” provide a welcome respite from the daily grind, but they rarely have long term impact. The neurosciences offer an important clue regarding what has occurred after listening to the expert or motivator. Recent research regarding the hormonal system in the human body points to the important role played not just by adrenaline, but also by oxytocin, a hormone that brings us closer together rather than leads us to fight or flee. Oxytocin is a “bonding” agency. It is critical to the production of love and hope in human beings. It is the hormone that surges in women (and even in men) when a child is about to be born. It is the primary physiological ingredient which turns (to use Martin Buber’s phrase) an “I-It” relationship into an “I-Thou” relationship (Buber, 2000).

We propose that oxytocin is also critical to the sustained enactment of expert advice or engagement with a compelling vision. While adrenaline may surge after receiving compelling advice or listening to a stirring (and visionary) speech, it is the bonding power of oxytocin that motivates people to build on expertise and a vision through collaboration and community. The neurosciences are teaching us that experts and leaders of vision must not just excite people, they must also “bond” people to their expert advice or new vision. Triangulation is required for expertise to be effectively used or a vision to be sustained. By this we mean that it is enough for two people to work together—a third element must be present if the working relationship is to be sustained. This third element is a shared vision (linked to a shared mission, set of values and compelling social purpose).

The “I-Thou” conception offered by Martin Buber provides us with guidance in this matter. According to Buber (a Jewish theologian), the “I-Thou” exists through God’s grace. Similarly, the Greek word “agape” refers not just to mankind’s relationship to some deity. It also relates to the ways in which we treat and care for other people on behalf of our religious beliefs. During the 21st Century, we need not focus on the relationship between humankind and a deity—we can focus instead on ways in which collaborative relationships are enhanced and sustained (“I-Thou”) when these relationships are based on a shared vision. We don’t need adrenaline. Rather, we need oxytocin which is produced to bind people together and bind people to a vision (as well as mission, values and purposes). This is the key to enactment of collective expertise as well as sustaining a vision. The expertise and vision must induce a sense of community and shared commitment; hence neither the expertise nor the vision can just be the product of one person’s advice or sense of the future.

If people are open to the sharing of expertise and are bound together, at least in part, through commitment to a shared, compelling vision of the future, then it becomes obvious that the two key roles to be played by the visionary leader are keeping the vision alive and preparing a new vision. This usually means not only that the leader periodically reminds his or her colleagues of the vision, but also that the leader facilitates a periodic review of and updating of the vision. The leader of vision is in trouble if the vision either is ignored or if the vision is reached. We continue to look for expert insights and advice from other people because there must always be a sense of something undone, of something yet to be done, of something worth doing.

Image of the Future: Many years ago, a noted European social historian, Fred Polak (1972), wrote about the decline of social systems that have lost their image of the future. Polak points to a critical factor in the ongoing existence of any social system (or any living system for that matter). It must have something toward which it is moving or toward which it is growing. Organisms are inherently “auto-telic”—meaning that they are self-purposed. They don’t need anything outside themselves to engage their world actively and in an inquisitive manner. This is the fundamental nature of play and curiosity that is to be found among all mammals.

Without a sense of direction and future possibilities we dry up and find no reason to face the continuing challenge of survival. We find little reason for producing and preparing a new generation. In the series of Australian movies regarding Mad Max a post-nuclear holocaust world is portrayed that is coming to an end. When no viable future is in sight, then (as we see in these movies) there is no attending to children. They must fend for themselves, for we know they have no personal futures. Ironically, there is a powerful story about post-nuclear holocaust in a novel by Cormac McCarthy (2006), called *The Road*, in which the father continues to protect and sacrifice for his son, even though the world is coming to an end. This extraordinary protagonist somehow finds meaning and purpose – and vision—regarding his son in the midst of despair and death. Perhaps this is the type of leadership that we need in the challenging world of 21st Century polarization, terrorism, nihilism and despair.

The leader and collaborative group that is honored and respected for their capacity to convey a compelling vision of the future needs a viable vision. One of the great ironies to be faced emerges when the vision has been realized, abandoned or ignored. If there is no longer the need for a vision, then we certainly don’t need a visionary leader—and don’t need to continue meeting. The visionary leader and

collaborative group confront Irony: don't be too successful. Without an unfulfilled vision there is no need for hope or commitment to the cause. We confiscate our future and walk away with nothing new about which to dream.

We can point once again to Winston Churchill as a notable example of this decline in collective support for a visionary leadership. During World War II, Churchill not only exhibited courage—he also articulated a compelling vision regarding the future of England (and all of Europe), that helped to increase the resolve of English citizens to fight against the Nazi regime and Hitler's equally as compelling (though horrifying) vision for a new Europe. When the Germans were defeated, England and Churchill not only lost an enemy—they also lost their compelling vision for the future. While England (and all of Western Europe) were certainly better off after World War II than they were during the war, there was not a new Europe. The United Nations didn't solve all international problems. This was not the war-to-end-all-wars (as was proclaimed at the conclusion of World War I). Many writers have documented the existential despair that followed World War II, when people had to return to a life that had not improved, despite the visionary statements of World War II leaders like Churchill, Roosevelt, De Gaulle—even Stalin.

What about the role of vision on a smaller plain—in a group or organization? We propose that the same ironic challenge exists. The vision must remain viable. Community groups and organizations are often in crisis when they achieve some success and have realized a dream. What do we do now that we have completed this five-year plan? We have obtained this grant and have initiated our new programs, but nothing has really changed, and we are still hustling for more funds. Why do we need either the old experts or a new set of experts given our present circumstances? Is there really anything worth fighting for that can benefit from expertise?

It is critical that a new set of goals be established before the old ones are realized; it is equally as important, however, that achievement of the old goals be honored and celebrated. An organization that simply moves from one five-year plan to a second five-year plan is just as vulnerable to exhaustion and disillusionment as an organization that never realizes its dreams (because they have been set too high). We must appreciate the achievement of current goals and must linger for a moment to honor the old dream and vision before moving forward to a new sense of the future.

The old experts and visionary leaders face irony at this point. The "experts" no longer have much to say that is relevant or "up-to-date." Anything older than two years is now passe in our fast moving, technology-driven world. Yesterday's knowledge is today's remnant of the past. Ironically, it is precisely the success of an expert in moving a system forward that makes their "reality" no longer relevant. Similarly, the success of a visionary leader often leads to the need for a new vision (and new leader). The half-life of a vision is now shrinking, and visionary leaders are readily thrown on the trash-heap.

Often times, the dispensable expert and visionary leader must embrace the Irony and step aside for the new expert and vision—given that they have finished the task and await a period of rest and reflection back on what has been achieved. At other times, old experts and visionary leaders can move beyond the Irony by becoming the updated expert and new visionary leader. They find renewed energy and commitment while collaborating with others in generating expertise and formulating the new vision.

The expert and visionary leader, along those colleagues with whom they collaborate, must decide when “enough-is-enough” and when the mantle of expertise and leadership must be passed on to the next generation. The expert must become an expert regarding when to pass the mantle. The visionary leader must find and articulate a personal vision regarding what they will next do in their life. This is perhaps the most important decision that an expert, leader or collaborative group can make. When do we move on and how do we help the next generation succeed?

Conclusions: The Appreciative Window of Expertise

As we journey outward in learning to appreciate other people and situations we also begin to understand and appreciate ourselves in new ways. We come back full circle to ourselves and to self-understanding—a necessity for anyone wishing to facilitate collaborative expertise. The *Appreciative Window of Expertise* offers one way in which to comprehend the self-insight to be gained from an appreciative perspective and becomes a fundamental tool for building a community that fosters collaborative expertise.

There are essentially two ways in which both we come to appreciate our own distinctive area(s) of expertise: through self-perception and through the perceptions of other people. Our self-perceptions of expertise are based on the processes of reflection upon our own impact on the world in which we live and work, and comparisons we draw with other people who are also having an impact on this world. The perceptions of other people are made known to us through direct or indirect feedback. In some cases, we know of our expertise. In other cases, we do not. Similarly, in some cases other people know of our distinctive expertise. In other cases, they do not.

Given this scheme, there are four views of our expertise—as the widely used Johari Window (Luft, 1969, 1984) has popularized:

The Appreciative Window of Expertise

	Known to Community	Unknown to Community
Know to Self	Public Expertise	Private Expertise
Unknown to Self	Obscure Expertise	Potential Expertise

1. First, some of our expertise can be known both to ourselves and to other people. These are *publicly recognized areas of expertise*; if well-used, they will have been a big part of our success strategy. We can celebrate these areas of expertise with our colleagues—and also be alert to over-use.
2. Second, we might personally be aware of other areas of expertise that we possess; however, other people might not be aware of these areas of expertise. These are our *private areas of expertise*. We may be aware of them, but they are rarely of much value to us, given that others never see them being used, like the poetry one may be writing in one's mind. Evoking such private areas of expertise from our colleagues by listening attentively to their stories of past successes gives us a chance to encourage them to experiment and apply the lessons learned from these past successes to currently challenging situations.
3. The third possibility is one in which we are not fully aware of a distinctive strength we possess, whereas other people are aware. These are *obscure areas of expertise*. These areas of expertise are of little value to us until we have become fully acquainted with them and know how to put them to work. When a promotion feels undeserved and/or intimidating to a manager, it is often because they doesn't see their own areas of expertise as clearly as their colleagues and superiors do.
4. Finally, there are areas of expertise we possess that have never been acknowledged by anyone—including ourselves. These are *potential areas of expertise*. They represent the farthest edge of our growth and development.

The process of appreciation, in which a collaborative setting is established plays a central role, expands the size of the *public window* by providing an opportunity - through appreciative support and feedback - to learn more about our observed areas of expertise. It also provides collaborative participants with an opportunity to reflect on the nature of their areas of expertise. The *private window* becomes smaller in a culture that is appreciative: We begin to feel more comfortable in sharing personal insights based on our distinctive areas of expertise and talents. The *obscure window* also shrinks with appreciation: We have access to clearer information regarding our distinctive areas of expertise when the climate allows us and other participants to feel comfortable in providing one another with such observations.

Finally, with both the private and obscure windows shrinking in size, the *potential strength* window grows smaller and feeds into the public one: Potential areas of expertise are recognized for the first time both by us and our colleagues. Effective, collaborative sharing of expertise relates directly to this process of expanding the public domain of our acknowledged areas of expertise. Structures that provide sanctuary and temporary settings for collaborative diversity (such as Future Search or Open Space) enable dynamic constructivism to take place—building on expanding recognition and use of participant expertise.

Communities of heart, buttressed by appreciative processes and attitudes, provide members of a group with a framework for reflection on their own areas of expertise. These processes and attitudes enable participants to receive feedback from other people regarding the areas of expertise that they most want to leverage for their own growth and for the collaborative enactment of a shared vision. In these settings, and with appreciative processes and attitudes in place, there is the remarkable (and rare) opportunity for hand-in-hand achievement of individual and collective goals.

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