

# Dialogue, Innovation & Impact

CAREY INSTITUTE  
FOR GLOBAL GOOD

## Our Objectives

We provide powerful, transformational experiences for organizations and communities to help them fulfill their mission, achieve their vision and make the world a better place.

- To help organizations, foundations, institutions, agencies and communities develop best-informed strategies, design and launch new programs, address critical issues, build capacity, lead change and achieve maximum impact towards creating a stronger, more just and educated society.
- To apply thought and practice leadership in the disciplines of Organization Development, Dialogue, Systems Thinking, Whole System Planning and Innovation, helping people collectively determine, concerted work towards and successfully create a desired future.
- To bring values of democracy, inclusion, dignity, responsibility and accountability to every process, every program and every engagement, generating the high-levels of success that our work demands and inviting these values to take a stronger hold in the world.
- To convene multi-stakeholder, cross-boundary dialogues that advance peace and quality of life.

## Our Approach

We create exceptional results with, and for, our clients through expertise in:

- Dialogue
- Planning Design and Facilitation
- Systems Thinking
- Strategy
- Leading Change
- Organizational and Professional Learning and Development.

We help our clients build capacity with every engagement, transferring and developing skills, values and best practices to significantly improve organizational performance and culture.

Our work better connects people and groups across an organization, network or community by improving the alignment of goals, values and efforts, and providing the linkages needed to enable our clients to successfully lead and manage strategic action and create positive change.

## Powerful Solutions

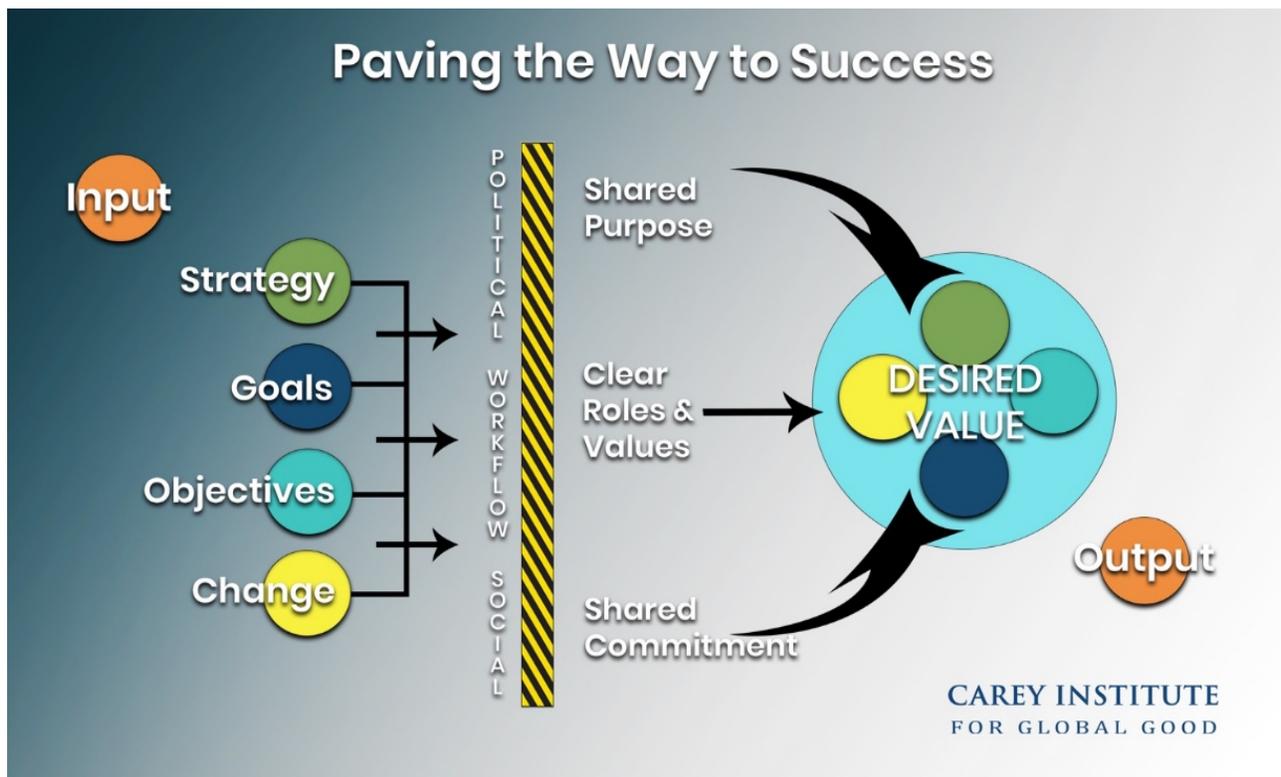
We believe the power of **dialogue** is unparalleled when new thinking, innovation and common ground are required to create high-quality solutions to complex matters. Dialogue is a way of engaging that's not discussing, planning, debating or negotiating—or 'shooting the breeze'.

Dialogue, in practice, is far more than a conversation. *Dia* means "through" or "across," and *logue* means "talk" and is related to the Greek *legein* which means "to gather." Dialogue makes it possible for people to stay—in healthy, productive ways—in the tension between differences in beliefs, ideas and values and the strong emotions these differences can manifest. **By staying focused on learning, understanding and seeing the whole without feeling need to defend, correct, influence or control, new ways of thinking emerge that are a synthesis of the collective knowledge, wisdom, stories, beliefs and values of those at the table. This kind of deep individual and collective learning is the gateway to discovery and innovation.**

Solutions are holistic because people see both the forest and the tress. The experience is powerful—one of dignity, meaning, head and heart, and one which helps to coalesce groups in powerful ways around shared aspirations and values. **Both the experience and resulting solutions become manifest sources of inspiration, alignment, partnership and highly-committed action.** Helping people who help the world realize these results is what convenings at the Carey Institute for Global Good are all about.

**"We cannot solve our problems with the same level of thinking that created them."**

**- Albert Einstein**



## Resolving Complex Challenges:

Important work is happening around the world on the part of many to promote peace, equality, competent governance, end poverty and hunger, responsibly manage resources, ensure healthy lives, develop sustainable economies, improve education and respond to climate change. These and other initiatives aimed to support the global good, including those included in the United Nation's Sustainable Development Goals, are of vital import to our future and are complex and challenging endeavors. The issues and the systems in which these issues are nested are defined by the reality of our times— they are volatile, uncertain, complex and ambiguous. To be effective, solutions must address a myriad of dynamics, structures, interdependencies and moving parts. **Success in both ideas and action rests in the ability of people to collaborate effectively, see the whole and the parts, and manifest well-concerted action.**

## Moving from Research to Solutions:

There is much research being done by many smart and talented people to help most-fully understand issues and explore potential solutions. We recognize the need for helping to operationalize sound research into action, and to move from research to action, knowing that aligned, highly-committed and well-concerted action is what will successfully address Big Problems, create stronger, more educated and just societies and secure a sustainable future for our next generation.

These solutions cannot be created in silos, but through the collective efforts of cross-boundary groups who can collaboratively learn from each other, understand the systems in which an issue rests and identify leverage points for greatest positive impact. And people have to act. The methodology at the heart of the Carey Institute's services in Dialogue, Innovation and Impact offers time-tested ways to successfully convene diverse, multi-stakeholder groups to collectively assess, learn, discover, make decisions and build (generally unprecedented) commitment for concerted action.

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## About the Carey Institute's Services in Dialogue, Innovation and Impact

We provide world-class expertise in designing and facilitating important planning and conversations to new insights, shared aspirations and values, agreements and action. We help organizations build capacity, resiliency and sustainability and to create their desired impact in the world.

Services:	Scope:	
	Teams	Multi-Stakeholder Groups
<b>Dialogue</b> <ul style="list-style-type: none"> <li>▪ Cross-Cultural Learning &amp; Bridge Building</li> <li>▪ Self and System Learning</li> <li>▪ Organizational &amp; Community Transformation</li> <li>▪ New Social &amp; Reality Construct</li> <li>▪ Conflict Resolution</li> </ul>	<ul style="list-style-type: none"> <li>- Complex Organizational, Political, Social and Cultural Concerns</li> <li>- Issues that require learning, and a meeting of minds and hearts to achieve progress</li> <li>- Quality of Communication determines Collective Reality</li> <li>- Where collaboration is the way forward</li> </ul>	
<b>Planning and Strategy</b> <ul style="list-style-type: none"> <li>▪ Vision, Mission, Value Proposition, Values, Goals, Implementation, Accountability and Action Plan</li> <li>▪ Portfolio Strategy</li> <li>▪ New Program Design/Launch</li> <li>▪ Set Policy Positions</li> <li>▪ Plan &amp; Implement Advocacy</li> <li>▪ Program Assess, Course Corrections</li> <li>▪ Capital Campaigns</li> <li>▪ Effective Alliances and Partnerships</li> <li>▪ Design Innovation</li> <li>▪ Solutions to Unique, Complex Issues</li> <li>▪ Develop Culture</li> </ul>	NGO's Not-for-Profits Foundations Institutions Agencies Associations Faith Groups Communities  Leadership Teams Boards Councils Programs Departments Divisions/Lines of Business Community Groups	Cross-Function/Boundary, Multi-Level Planning w/In and Across Organizations  Diverse, Multi-Stakeholder Engagement  Cross-Agency Planning  Alliances & Partnerships  Whole System Planning  Cross-Culture & Faith Dialogues
<b>Lead Change</b> <ul style="list-style-type: none"> <li>▪ Community/Organization Transformation</li> <li>▪ Stakeholder and Whole System Engagement</li> <li>▪ Restructuring and Repositioning</li> <li>▪ Improve Social, Political &amp; Performance Dimensions, Climate &amp; Culture</li> </ul>		
<b>Team Building</b> <ul style="list-style-type: none"> <li>▪ Align, Focus, Energize Teams &amp; Cross Boundary Groups</li> <li>▪ Resolve Issues</li> <li>▪ Progress Real Work/Goals</li> </ul>	Goals, Roles, Policy, Procedure, Relationships, Agreements Interdependencies – Value Chain Alignment  -- Experiential – High Engagement - Action Learning --  Cohort Learning – Communities of Practice	
<b>Training: Dialogue, Facilitation, Communication Skills, Leadership, Creativity, Innovation</b>		

## The Foundation of our Work

At the heart of the Carey Institute's services in Dialogue, Innovation and Impact are time-tested, proven convening and planning methods founded on seventy years of behavioral science research and best-practice *whole system planning and facilitation*. This foundation makes it possible for us to empower groups to tackle difficult and complex issues, create powerful, systemic solutions and facilitate an experience that inspires action.

## Our Process

Dialogue and productive engagement design are the foundations of all we do. To create meaningful change—whether launching new programs for social benefit, positively impacting a local economy, aligning and implementing advocacy efforts, or convening cross-boundary groups to improve the health of a community—a 'systems approach' to convening is essential to generating impactful results. Creating systemic solutions requires engaging representation from the whole system to:

- 1) Collectively understand the landscape, trends and forces that have created the status quo, and take at least some responsibility for one's role in contributing to this current state;
- 2) Productively manage differences in interests, beliefs, assumptions and values; and use this knowledge to better understand the issues and the system in which these are nested;
- 3) Tap the collective knowledge, experience, values and wisdom of those at the table;
- 4) Discover shared meaning and common ground on vision, values and action;
- 5) Truly commit to action.

# Key to Innovation, Systemic Solutions & Transformation



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As conveners of important dialogues, our charter is to design and facilitate successful meetings – convenings that inspire collaboration, learning, innovation and action. These outcomes are not wishful thinking, but rest in our expertise creating conditions for success. People will only do what they are “ready, willing and able to do” ([Weisbord](#)). Collaboration can never be forced and common ground can never be mandated; but, the right conditions can be created for people to bring the best they have to offer forward, collaborate effectively, innovate and discover their greatest capability for collective action. Creating these conditions for groups to effectively collaborate, manage differences in beliefs and values, and discover novel solutions to their most pressing concerns is what we offer the world.

## Initiative Design

Stakeholder engagement is at the heart of any initiative design. Once a meaningful theme for convening is established—a case people feel is important to address and inspires an inner voice that says, “this is important to do, I want to be a part of this”—then a steering committee or advisory board is created from key constituencies related to the theme and the systems in which the concern is nested.

**Most potently, the process and solutions emanate from the system (versus a body of experts who offer research and make recommendations).**

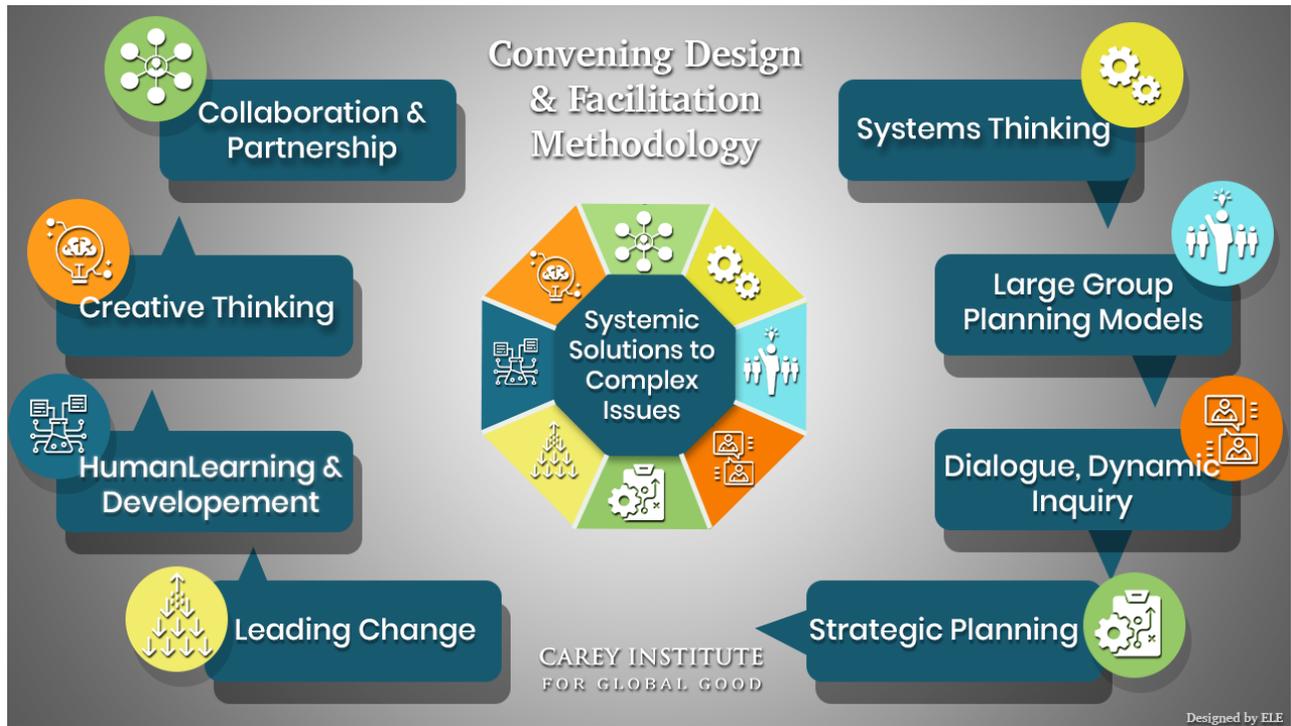
This central group then works with the team at the Carey Institute to better understand the issue, the larger system and determine who needs to be involved to create high-quality, actionable solutions.

The *advisory team* (or *steering committee*) is then expanded into a *planning team* of eight to fifteen people from key constituencies and works with us to finalize a meeting design based on the methods, principles and methodology that is the foundation of our work. The project may be one that is more transactional in nature, involving a single, two- to five-day meeting or more transformational in nature, involving a sequence of meetings or parallel convenings to engage many people/groups. In this way, collaboration and productive engagement become the core values and practice of any effort from the start. Most potently, the process and solutions emanate

from the system (versus a body of experts who offer research and make recommendations). This methodology of engagement from the start makes it most likely that **participants own the outcomes and lead the way forward with, what we have found to be, unprecedented commitment.**



## Design Process



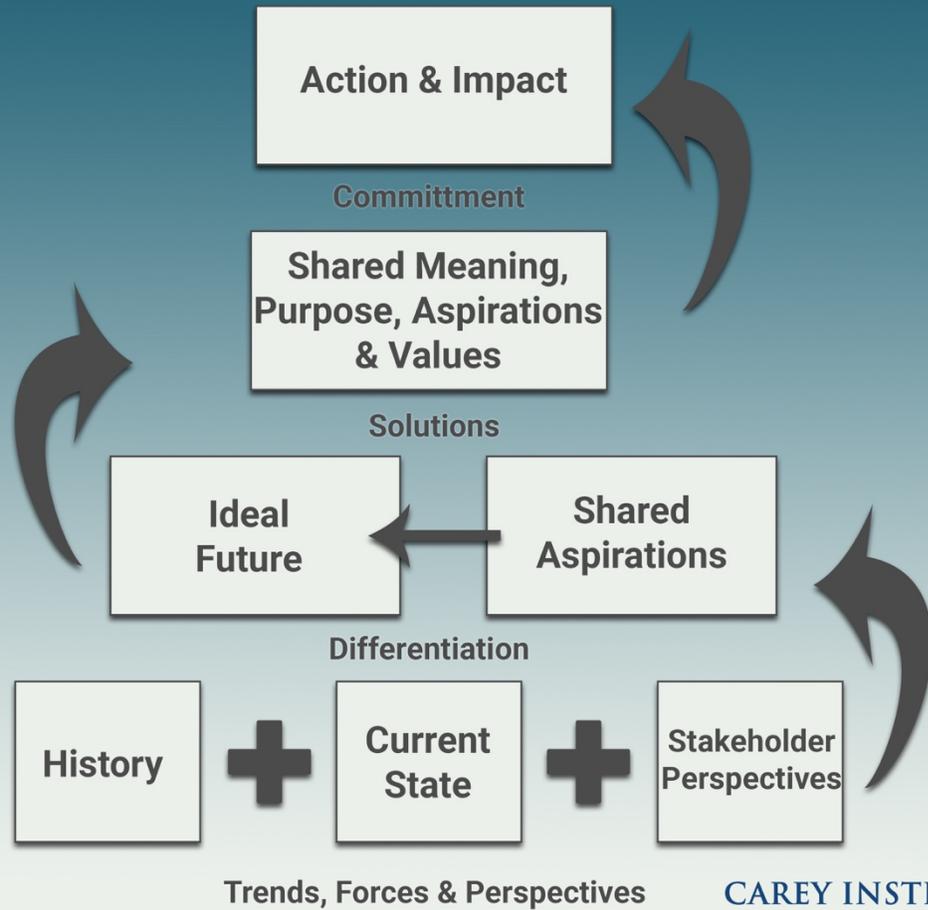
## Meeting Design

We offer a continuum of designs for important convenings, all based on the principles and methods discussed above and tailored for the specific group and purpose. An interfaith dialogue to bring greater understanding and forge cross-cultural relationships across a community will look different than a cross-agency initiative to improve the human services across a region. While these agendas will vary and look quite different on the surface, the underlying principles, values and design objectives all draw from the same body of research and proven best practices we base our work upon. In this way, we are able to offer people a tailored experience based on principles, archetypes and values versus an off-the-shelf, one size fits all process.

## Design Principles

Principle:	Design Implication/Action:
Diverse groups/people coming from very different places will tend to collaborate much better when they see & feel that they share the same world.	Collaboratively generate a sense of shared history, challenges, concerns, gifts, appreciations and perceptions of current reality.
Issues can only be understood and impactful actions designed when people understand the systems in which these issues/situations are nested.	Collaboratively generate a 'Global'/Big Picture View— an understanding of the human, structural, technological, capital, political, social, belief and/or cultural systems in which an issue or set of concerns are nested; identify most significant trends, forces and levers influencing the future.
People/groups tend to polarize and become stalemated over specific differences in interest, belief or values.	Facilitate Dialogue so that people can stay in the tension of differences without having to feel the need to change or to change anyone else; Differences used as opportunities for learning about group identity instead of being characterized as conflicts that need to be resolved; Focus on discovery of common ground and a collectively desired future.
Groups cannot reach 'integration' around interests, beliefs or actions until they first (productively) differentiate.	Design opportunities for individual/stakeholder perspectives to be explored, recognizing and honoring differences.
Integration happens when groups discover shared interests, values, experiences and aspirations.	Discover what is shared; Engage in <i>futuring</i> (developing scenarios of a collectively desired, ideal and realistic future).
- People will act with greatest commitment when they have been part of the analysis and ideation of the plan. - People will tend to take sustained action on those things they have made a public commitment to act upon.	Create conditions where self-responsibility for learning, contribution and action is the modus operandi of the process (engendered through meeting structure, working agreements, task expectations & facilitation methods); Facilitate public commitments to action.
The evolution of a group towards greater cooperation, learning and collective action takes time and investment (participation/contribution) to unfold.	Participants are encouraged to attend the entire meeting; We discourage observers.
Understanding complex issues and creating novel solutions demand learning, insight and reflection.	Design enough time for the convening, recognizing the need of 'soak' time, generally 1-to-several nights sleep.
People work better in healthy environments & conditions.	Space is a comfortable size for the group with 'room to breathe', natural sunlight, healthy food/snacks.

# Collaborative Planning Framework



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Above graphic based on "Search," "Future Search," and "GE Work Out," methods.

# About Us

## Shem Cohen

### Director of Dialogue & Facilitation The Carey Institute for Global Good

Shem Cohen is an Organization Development consultant, facilitator and change agent with deep expertise helping leaders to align, focus, develop and energize organizations to high performance. His work brings together the business and human sides of enterprise, helping clients to achieve notable success through collaborative planning, change management, leadership coaching and custom-designed processes to solve challenging business concerns and/or human system dynamics. Through his work clients are able to forge new directions, successfully manage their most pressing organizational challenges, engender unprecedented buy-in for concerted action and significantly improve organizational capabilities, communications, relationships and culture.

Shem's work has been included in three globally published books on best practice collaboration and planning including the award-winning 'Productive Workplaces, 25th Anniversary Edition' by Dr. Marvin Weisbord. Shem has been honored to serve as guest faculty for New York University Stern School of Business Executive Education Program and as invited thought leader for Aerojet Rocketdyne, the historic builder of rockets for NASA, sponsored learning group In2In, on Leadership and Innovation. Shem is currently writing a book on how to best manage challenging conversations to a meeting of minds and hearts.

As a management consultant, sociotechnical systems adviser and executive coach Shem's clients span a wide range of industries including Finance, Healthcare, Technology, Consumer Goods, Manufacturing, Diplomacy, Education, Law and Environment; and organizations both large and small including global corporate firms, international, national and state-wide government agencies, not-for-profits and many small-to-mid size businesses and groups. Several clients include: The United Kingdom Mission to the United Nations, The British Consulate and Home Office, The Federal Reserve Bank, New York State Department of Labor, Marriott, Church and Dwight, Xerox, Del Monte Foods, Heineken USA, Perkin Elmer, Credit Agricole Bank, JPMorgan Chase, Iowa Health System, Capital District Physician's Health Plan, Doylestown Hospital and Buck's County Physician Network, American Taekwondo Association, National Parks Conservation Association, Albuquerque Public School System and many others. Shem holds a Master's Degree in Organization Development from the American University and NTL Institute for Applied Behavioral Science and is also a classically-trained guitarist who enjoys listening to and playing music from around the world.

**The Carey Institute for Global Good** is a not-for-profit organization founded in 2012 by Wm. Polk Carey and is dedicated to building a strong, educated and just society. We provide education, tools and resources to practitioners of the global good to help them succeed. We put practitioners first—teachers, journalists, farmers—because we know that they have the power to change their communities and inspire others to do the same.