**At the 2010 gathering of Online Community Enthusiasts,**

we explored ways in which boundary critique can help with common challenges. These notes provide an overview of that part of the day.

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## Context

Boundaries are rarely—if ever—emphasized in workplace conversations, leadership competency frameworks or curricula. And yet we are increasingly aware that our environments are complex systems made up of many interacting parts and not as predictable as we might like them to be. The fields of systems thinking and complexity thinking focus on such environments. Some prominent systems thinkers argue that boundaries are THE central concept in the systems and complexity fields.

One of many links amongst elements of the workshop was a book review Alice wrote about Digital Habitats from a systems/complexity perspective. Some participants read the book and the review before coming onsite.

Alice MacGillivray facilitated this session and has recently completed a study of respected leaders who work in horizontal environments (such as communities of practice and networks) where they have little or no positional authority. They also worked—or had worked—as formal leaders in hierarchies. The study explored how they understood and worked with boundaries. Unexpectedly, many of their stories related to the challenges of bringing new knowledge from communities into hierarchies.

## Initial Challenge-Identification Activity

Individuals wrote brief statements about challenges they face when bringing ideas, learning, innovation and leadership from their horizontal communities and networks into their formal, vertical structures. This boundary is typically a challenging one for people employed in traditional hierarchies and working with communities of practice.

Themes from #OCE2010 activity: Challenges faced when trying to bring learning/ideas/innovations from horizontal environments (networks, communities) into vertical structures:

### SHARING

* Sharing projects in a community that do not originate in that community
* Resistance to sharing data and research findings

### ENGAGEMENT

* Finding a spark that draws participants into online dialogue that is meaningful to them
* How to find people in an organization who could participate in a community of practice? Identifying & engaging people
* How to keep a community active? Helping to keep members engaged?
* Intermeshing communities: \* what we do with what another community can offer

### FALSE STARTS

### COMMUNICATION

* Getting administration to act on initiatives
* Developing & implementing better localized communication between departments
* Developing and strategic planning technology committee to centralized communication & publishing
* Relaying the information back in a way that is meaningful
* Collaboration “networked”
  + Away from hub and spoke
* Moving from ideas to execution. Spectrum from understand to explore: Where do you step?

### LEADERSHIP

* Leading without authority
* Support for grassroots f2f groups that already exist in an online community
* Migration & manifesting their identity and activity online
* Meeting the requirement of institution ***policy***
  + Learning, objectives
  + Processes and procedures
  + Staffing requirements
* How to manage change in an organization that doesn’t appear to value change?

### TIME

* Time and funding
* Disseminating and sharing information with others and finding the time to bring everyone together. This involves “convincing” others that learning can benefit them.
* Developing an action plan with a timeline for integrating the learning from the workshop (as an individual)
* How do organizations ***value*** the time spent by their staff in online communities
* University faculty members—does this count toward tenure?
* Health care managers – how does this count toward tenure
* Health care managers – how does this activity help take care of patients?
* Buy-in by the busy folks who would probably be interested, but are already extended
* Finding ways to motivate involvement in community events when faculty are so taxed for time
* For me to follow through on what I think I could do
* To follow through with management and get to a point where there will be sustained commitment and enthusiasm ☺
* Time-deprived participants
* Provisioning resources

## Small Group Work

Before the small group interactions, Alice introduced two items: the theory of boundary critique developed by Gerald Midgley and a few examples of strategies that leaders use to work with the boundary between horizontal environments (such as SCoPE or OCE) and vertical environments (such as a university). These are shown in the Appendix.

We took one theme that permeated the items gathered above. It was introduced something like this: “Imagine you go back to your workplace with new ideas for improvement, potential innovations, ways of networking etc. but you face some challenges. The CFO agrees this might be more effective, but it will cost more and he’s not supportive. The Provost doesn’t get on board. People are too busy to listen. It’s just ‘Joe’ with another crazy idea… How might strategies shared by the research participants help to solve specific challenges you might face when you go back?”

The small group work was a part of an “Ecosystem Café” or modified World Café. Each “table” had a host and each host held an image that represented a strategy for work with boundaries. This was a pilot of sorts, which will help to inform conversation in a systems conference in the UK this summer. We had time for two rotations, so each person was able to focus on two strategies.

## Feedback

Some feedback came in the form of debriefing during throughout the early afternoon and other feedback was written. My overall read is that we rushed things too much but there is good potential to use these tools for community and network-related problem-solving with more context, structure and time.

**There were two things that surprised me about the feedback.**

**The first** was that the groups did not seem to get into specific challenges and specific solutions**.** Two ideas come to mind:

1. Thinking and learning styles: perhaps abstract thinkers needed very concrete pushes to get to very concrete issues? Or concrete thinkers were a bit lost with abstractions?
2. Design: perhaps we should have begun with a structured brainstorm to identify one or a very small number of concrete issues (had there been time). From there we could have moved into an ecosystem?
3. Perhaps the images were confusing rather than springboards for different directions?

**The second** was that in the feedback through paper forms, there was a question that read:

Work with these and other boundary concepts has the potential to…

help my executives in their work by:

I had included a N/A option as I thought a few people might be independent consultants who might not choose to speak about executive clients. Most people chose N/A, regardless of what they documented as their place of employment. Which is ambiguous and quite fascinating, given that we were exploring the flow of innovation, knowledge and learning from learning-oriented networks and communities into formal structures. I had no idea how to interpret those statements. Some of the possibilities that came to mind were:

* **Language**: if an organization speaks about “senior managers” or “board members” or “the provost” or the “DM and ADMs” or “president and VPs” perhaps the word executives doesn’t have meaning?
* **Internal barriers**: perhaps people feel very removed from the executive, and don’t even think of the possibilities of their learning influencing executive decisions.
* **Optimism or Pessimism**: the executives are doing a great job and don’t need new ways of thinking, or there is no point trying.

Written comments are included in Appendix B.

## Materials Presented (Appendix A)

The following information was presented briefly during the workshop; some examples are omitted and others added.

One simplified version of Midgley’s theory of boundary critique is shown here. The vertical organizational structures tend to hold power and determine norms, boundaries, policies, rules and what is valued. The extracurricular learning in networks and communities might or might not be valued: the marginal area could be made more valued or more excluded.

“Extracurricular” Communities of Practice

Vertical Organizational Structures

Secondary Boundary

Primary Boundary

Focusing on strong, impermeable, primary boundaries can come with a range of risks, especially in changing circumstances.

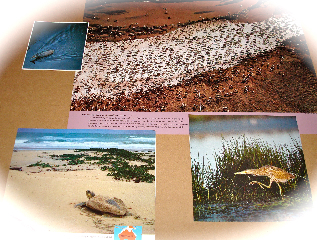


In nature, estuaries are places where habitats come together and form rich, diverse environments that can be full of surprises. “Intellectual Estuaries” are the places created or enabled by leaders in my study to bring together people from different backgrounds, and trust that good things will come from lightly structured spaces for dialogue and innovation.

Perhaps BC Campus or SCoPE or #OCE2010 could be thought of as having elements of Intellectual Estuaries?

Sometimes it is good to make boundaries more explicit or stronger. In nature, there are many natural boundaries between habitats. Some species, such as beaver, create boundaries in order to thrive in their environments, and in doing so, they create opportunities for other species. Some boundaries protect territories or protect the vulnerable. Does this relate to decisions about community boundaries? For example, a large American CoP excluded senior people in an effort to optimize trust and learning.





Many of the leaders I observed   
and interviewed made a point of weaving paths back and forth across the vertical/horizontal divide. Some deliberately created tensions between the two, but I didn’t pull that strategy out for the OCE workshop. I happen to know Sylvia, and I think I see her doing this, sometimes appearing to be a BC Campus person and sometimes appearing to be immersed in other forums and networks, always working to encourage the flow of knowledge across these boundaries.

Sometimes boundaries become so blurred that it isn’t easy to see the original entities. The lichens we see on rocks and trees in BC are combinations of food-making algae and water-retaining fungi. And the squid pictured to the left has partnered with light-emitting bacteria. The squid controls the amount of light in order to protect itself and hunt more effectively.

John Smith and I drew on this metaphor in an AACE paper, where we described a partnership between Royal Roads and CPsquare. Graduate students experienced a course about communities of practice, and they happened to spend 7 weeks of it in both the CPsquare workshop and the RRU e-learning platform. They found the combined environment a very powerful experience.





The Estuary:

“Even in a turbulent river, there are places at the edge—eddies—where the water swirls in the opposite direction, carving out a special niche by the stream bank.

Jack Cornett described eddies in this way:

Eddies are useful. They give you the opportunity to sit in the calm and get some perspective a little bit and then you go back into the main current. When I paddle—and I paddle a lot: white water-so here’s the analogy there—I don’t see the eddy as marginal. I’m stopping there catch my breath, look and see what’s downstream and figure out the path to go forward…I don’t view it [as a boundary with main current]. I certainly try to use it to bring in different people so that we can learn what you don’t know you don’t know.

Alice: So a quiet, reflective…

An eddy is an opportunity to reflect, but I try to push. Let’s push at the boundary here just to see what we can learn about what other people are doing and different approaches and things like that.

MacGillivray (2009) pp. 156-157

(The additional reflective image at the bottom confused people rather than adding another idea-prompting option, so I’ll drop it.)

## Written Feedback: Appendix B

**The form read:**

**Feedback on Preliminary Work with Boundary Concepts and Strategies**

**In the #OCE2010 gathering, we have explored a few boundary concepts in a modified World Café format.**

**Work with these and other boundary concepts has the potential to**

* **help me in my work by:**
* **help my executives in their work by: 🞏 (check box if N/A)**

**I am willing to complete a short survey in about two weeks to provide updates or additional reflections**

**🞏 Yes, time permitting**

**My e-mail address is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Any comments about other uses of the tool   
or suggested improvements for the modified World Café approach?**

**I understand that these comments may be used anonymously in systems-thinking community conversations and/or publications**

**Please initial: ­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Thank you very much,** Alice MacGillivray [www.4KM.net](http://www.4KM.net)   
currently working with concepts of Edge Effect™ and Intellectual Estuaries™

**Work with these and other boundary concepts has the potential to**

* **help me in my work by:**
* provide context
* bigger picture thinking
* stop and reflect
* make explicit ways to use boundaries/boundary ideas
* clarifying different factors that affect communities
* not sure I understand enough to comment. I struggled between leadership comments and the metaphors and the task at hand for the groups. I needed a clearer introduction; metaphor of estuary was unclear.
* Give me another metaphorical framework that really resonated. Another “oblique strategy” if you will.
* Determining scope of communities for forecasting sustainability
* Framing my thoughts on communities of practice.
* **help my executives in their work by**: (in addition to lots of N/As)
* ? Not sure what would help them
* provide context, opportunities to reflect and bigger picture thinking
* providing a framework to understand community processes in a simple way
* the discussion about community is not something our executive spends much time thinking about: would need to be more concrete
* have a way to communicate about both the multi-stakeholder and multi-community issues we face.

**Any comments about other uses of the tool   
or suggested improvements for the modified World Café approach?**

* The use of metaphors/photos really helped to frame and push the discussion
* Too abstract; needs framing within specific process or larger exercise
* Instructions and pre-briefing need more clarity
* Metaphors are good/useful however more structure in delivery suggested
* I’ve read the book and I’ve been involved in World Cafes before; this is the first time it worked!
* More structure in café flow would help
* Applied concepts instead of general discussion

**I understand that these comments may be used anonymously in systems-thinking community conversations and/or publications**

Write-in comment: “Can I participate in that community?”

My response: I will make sure this person has more information. It isn’t an easy question to answer, as there are many ways of engaging and because the field is large and multi-faceted, there are bound to be some dead ends for individuals with particular interests.

Two of the major focus points are the International Society for the Systems Sciences (ISSS <http://isss.org/world/index.php>) and the Institute for the Study of Coherence and Emergence, ([ISCE](http://iscepublishing.com/?AspxAutoDetectCookieSupport=1)) which publishes the journal Emergence: Complexity and Organization as well as books. Both have conferences. The tones of conferences and types of research and world views seem to vary depending on location. I find myself relating more to European and Australia/New Zealand practitioners than to North Americans (in general).

**Primary References:**

MacGillivray, A. (2009). *Perceptions and Uses of Boundaries by Respected Leaders:*

*a Transdisciplinary Inquiry.* Doctoral dissertation, Fielding Graduate University, Santa Barbara, CA.

Midgley, G. (2000). *Systemic intervention: Philosophy, methodology and practice*. New York: Kluwer Academic/Plenum.