

Alignment Processes

Alignment is an exploratory and clarifying process to cooperatively discover mutual resonance and right fit within collaborative relationships. Alignment is layers deep and takes time to discover. Because people and groups are dynamic, there are several ways to approach sensing true Alignment and resonance.

Alignment is fundamentally an internal process within ourselves- a consistent practice of assessing coherence within ourselves, and then between group members and/or between collaborative groups. Assessing and adjusting our own alignment ensures that we contribute to the Alignment for the whole.

These processes include practices to assess, manage, and maintain Alignment between parties as well as to periodically reassess and adjust or realign as necessary- acknowledging flux and change.

The Areas of Alignment for exploration during the Alignment Process are as follows;

Vision- Elucidating the attractor of common purpose, shared inspiration, intended impact, collaborative potential- generating the North Star or “reason for being” to guide the activities of a group.

Social DNA- Exploration of the fundamental principles and beliefs that guide activities, decisions, practices and establish ethical common ground

Right Placement + Right Timing- Exploring the optimal intersection for all parties' passions, skills, gifts, expertise, needs, and limitations to be most easily and naturally expressed- including roles, functional domains, responsibilities, collaborative workflows, deliverables, etc.

Reciprocity/Terms- Ensuring the conditions, expectations, financial reciprocity, agreements, timelines, objectives and terms are transparent, clear, equitably agreed upon by all parties.

Internal Group Alignment

Crafting the foundational elements for a flourishing cooperative culture and the effective operational capacity of any team or group requires discovery and design to ensure shared Alignment. Alignment may happen in stages as the formation of a group occurs- but ensuring that each level of Alignment is assessed within the early stages of a group's development is essential. If Alignment is not established in the formative stages of a group or organization, these practices can still be utilized to fortify the foundations and support ongoing coherence of a group.

North Star Exercise

Deep Dive North Star Session(s) to generate Vision, Mission, Purpose and intended impact.

- Host a dialogue for each group to share their personal highest aim and driving purpose.
- Facilitate a dialogue about the attractor of common purpose, shared inspiration/vision, identifying the collaborative potential and intended impact.
- Identify common threads and mutual alignment or note unique differences. The aim is to ensure compatibility and common orientation.
- Through iterative feedback or collaborative design session, synthesize into a North Star statement that encompasses the aligned shared aim.

Determine Social DNA

Social DNA Session(s) for defining and shaping the ethical roadmap for the culture of the Group, Project, or Organization.

**See the "Ethical Foundations and Culture Mapping" Resource for more information.*

- Review the definitions of the components of social DNA including beliefs, principles, values, behaviors, practices, tools, and non-negotiables
- Facilitate inquiry process to allow each group member an opportunity to define the social DNA of the group from their own perspective.
- Distill the 1-3 word key phrases from each section of the inquiry process.
- Compare the answers of each group member and discuss points of convergence and divergence to better understand each perspective.
- Synthesize the answers that have the most common ground as the representation of the organization or projects foundational social codes. For the culture map, the group

synthesizes the key phrases and determines the answers that most represent the common ground of the organization or project.

- These key phrases become can then be added to a graphic or image that is then an easily referenced “culture map” outlining the group’s ethical and cultural foundations.

Determine Right Placement/ Right Timing

Determining the right fit of each party, the capacities needed to fulfill the purpose of the group, and the appropriate sequence and timing of activities and involvement ensures cohesiveness in the collaborative function of a group.

Host inquiry process to discuss:

- What are the functional areas of the group, project or organization that need contribution
- What are the competencies, skills, and bandwidth of each person and how will each person contribute?
- How will you leverage the gifts, talents, passions of all parties involved to ensure that each person is creatively engaged?
- Based on these insights- what is the right positioning of all parties to collaboratively fulfill the needs of the group or organization?

RACI Organizing Matrix

Develop R.A.C.I. matrix to organize the roles or functions and how each person will contribute to these. This chart is a reference guide that supports clear understanding of who will be involved, in what capacity, to fulfill the various tasks and activities. (* See the “RACI Organizing Matrix” Resource for more information about this process)

Reciprocity & Terms

- Facilitate discussions to outline expectations, timelines, cadence agreed deliverables, IP, shared assets, reciprocity, financial arrangements, etc.
- Facilitate inquiry processes to ensure each party has the opportunity for clarification, negotiation, and ultimately to have input into crafting aligned agreements.
- Facilitate an inquiry process- what is the cadence for reassessing Alignment? Do you check in monthly, at the end of a phase, annually to see how things are aligning? What is the process for evaluation of alignment and re-adjustment?
- Codify, outline and/or celebrate the agreements and shared understandings that have been reached. These might be drafted as a MOU, chart of work, contract, or other form to reflect the agreements. Include agreements to abide within the Social DNA and Culture,

when and how you will reassess Alignment, as well as how you will navigate conflict or disagreement and how the agreements will dissolve as necessary.

Additional activities to support Alignment

- Facilitate relationship building processes, including a *Organizational Insights* process for deeper understanding of each group's strengths, priorities, styles, and growth edges.
- Organizational Design Development process to make visible the group or organization's structures, roles, decision making processes, and protocols.
- Develop the functional areas of a group or organization. These can include operations, value accounting, tools, communications, relations, financial stewardship, etc. Define the processes and protocols of how these areas of focus will work and work together to ensure cohesive functionality of the Organization or group.
- Revisit Alignment and vitalize collaborative capacity during ongoing team meetings, reviews, team connection sessions

Alignment with External Partners & Collaborators

Exploration Process

For groups who are exploring shared synergy and advancing opportunities to collaborate, Alignment process is useful for assessing compatibility and clarifying the shared intentions. It's important to collaboratively establish a shared purpose for the collaboration, as well as to take the time to discover each organization or group's "operating systems". This can be facilitated in many ways, with one model being to go through an Organizational Insights process with questions asked of each party to make visible the capacities, areas of focus, growth edges, needs, and strengths that each group brings to the table. If Alignment is found and there is a desire to collaborate, facilitating a process for co-developing Social Protocols (and when appropriate, Core Values and/or Guiding Principles) and determining Right Fit and Reciprocity/Terms will help guide a cohesive collaborative relationship between the groups.

Alignment to shared Purpose

- Facilitate sessions to allow each party to share their personal or organizational Purpose (or North Star) and priorities.
- Facilitate sessions to discover the attractor of common purpose and/or shared vision, to identify the collaborative potential and intended impact between the groups. Identify

common threads and mutual alignment or note unique differences. The aim is to ensure compatibility and common orientation.

Organizational Insights Process

If Group's purpose is aligned, and a mutual purpose can be identified, groups may desire to explore more levels of compatibility. Going through an Organizational Insights process can support deeper understanding of each group.

- Send a questionnaire that allows for each group to share insights about the group or organization. This can be one person from each group filling out the questionnaire on behalf of the group, or several members answering the questions about the group from their perspective.

Some suggested Organizational Insights questions:

- What are the unique gifts of your group/organization?
- What are your organization's growth edges or challenges?
- What is your organization or group's collaboration & communication style?
- What are the group's governance structures and/or decision making processes?
- What are your group's values and/or guiding principles?
- What are your non-negotiables?
- What is your group's success criteria for collaboration?
- What are your group's core competencies or offerings?
- What is your group's current priorities or what is on your group's immediate roadmap?

Social DNA Alignment

- Facilitate the sharing of the social dna or culture of each group and explore compatibility
- Groups may decide they are aligned through their existing cultures and approaches to social patterns and can adopt and leverage these to guide the effective collaboration between the groups.
- For some groups, there may be value in collaboratively determining shared Social DNA to guide the culture and agreements between parties. Host design session(s) to help draft a list of shared Social Protocols as a baseline set of agreements for working

wisely and well together. If useful/relevant, group's can also craft Guiding Principles and/ or determine shared Values to support committed practices for a meaningful and effective collaborative relationship.

Develop Social Protocols

Agreements and best practices for effective collaboration and strengthening our social intelligence.

Example social protocols

- Ensure all voices are heard and considered
- Commitment to direct and respectful communication
- Compassionate and consensual feedback
- Equitability in sharing of responsibility, authority, and benefits
- Proactively resolve challenges by contributing to solutions
- Commitment to steward ethical foundation and abide within culture
- Participate in iterative feedback processes & practices for growth and mutual upliftment
- Work towards alignment & realignment within oneself, with team, and with project
- Commitment to Tension Revelation Protocols
- Commitment to fostering Trust through integrity, authenticity, accountability, consistency, and care

There may be instances where it is necessary to also draft social protocols or agreements of light decision making, agreed method/tools for communication, feedback/review processes, accountabilities, etc. to guide the collaboration.

Establish Guiding Principles

Guiding Principles are core fundamental propositions that serve as the foundation for an organizational system of behavior- guidelines that help shape & inform our behaviors. Ethics are principles. Morals can be principles or values. They are what we hold dear to our mind, whereas Beliefs are more what we hold dear in our heart.

Example guiding principles

- Trauma informed communication
- Service Leadership
- Circular Leadership

- Collective intelligence
- Shared learning
- Reciprocity
- Rhythmic Re-Alignment
- Personal & Mutual Accountability

Determine Core Values

Core Values are qualities that govern our character and behavior and are essential to our internal guidance system, helping us determine if we are on the right path, creating cornerstone guide posts to return to in order to continue to align with our own truths.

Example core values

- Authenticity
- Respect
- Mutuality
- Adaptability
- Creativity
- Inclusivity

If Vision/ Purpose and the shared Social DNA are found to be in Alignment, and collaboration is desired, next is to determine how to operationalize the Alignment and collaborative relationship.

Right Placement/ Right Timing

Determining the right fit of each party, the capacities needed to fulfill the purpose of the group, and the appropriate cadence, sequence, and activities ensures cohesiveness in the collaborative function between the groups.

Host inquiry process to discuss:

- What are the functional areas for the collaboration that need contribution from each group?
- What are the competencies, skills, and bandwidth of each group and how will each group contribute to the collaboration?
- How will you leverage the gifts, talents, passions of all parties within the groups to ensure that each person is creatively engaged in the collaboration between the groups?

- Based on these insights- what is the right positioning of all parties to collaboratively fulfill the shared needs of the collaboration?

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