



# lenses

## facilitator manual

How to Create Living Environments in  
Natural, Social, and Economic Systems

May 2018



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How to Create Living Environments in Natural, Social, and Economic Systems

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# acknowledgments

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We would like to extend our deepest gratitude to the following individuals, groups, and organizations, for we truly would not be where we are today without their efforts in creating the LENSES Framework, their support of CLEAR's (Center for Living Environments and Regeneration) mission, and their constant enthusiasm for creating a thriving world.

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# foreword by andrés r. edwards

## A Regenerative Approach for a Thriving Future

As we confront the challenges of the 21st century, our approach to solving complex environmental, social, and economic problems will determine our success or failure. Our approach provides a context from which to select the best tools to achieve lasting solutions. Therefore, choosing a wise approach makes a critical difference in determining the best path toward appropriate solutions that will help us create a livable future. In these perilous times, we urgently need a new way of thinking. Regenerative development provides a road-map to solve today's challenges in a way that supports life indefinitely.

A regenerative approach is based on the concept of renewal and replacement. In the natural world, renewal happens every second of every day as part of the cycle of life. Trees renew themselves, bearing new fruit every spring; animals die and newborns emerge; the soil constantly replenishes itself; and the seasons renew year after year. This regenerative process is nature's design template for healthy continuity that has taken place over millennia.

In human systems, a regenerative approach seeks to rejuvenate the health and vitality of institutions, products, and services by constantly adapting and renewing. In the business sector, for example, this involves designing long-term business plans that empower workers to renew their skills and become life-long learners. It also involves providing services that continually adapt to changing circumstances. In manufacturing, regenerative designs ensure that the resources harvested to make products are extracted and utilized responsibly, and the product's complete lifecycle is designed from cradle to cradle. In addition, products are designed with the intent to support thriving communities and the wellbeing of individuals over the long-term.

The regenerative development lens emphasizes replenishing cycles rather than linear processes. The water, carbon, and nutrient cycles in nature can be mimicked in our built environment. In this way, regenerative transportation, agriculture, and building systems, for example, embrace a holistic approach that constantly renews and enhances itself. In the transportation sector, the focus lies in designing mobility systems such as cars, buses, trains, airplanes, and bicycles that renew and improve upon the materials and energy resources used. In agriculture, crops replenish the soil nutrients and establish a healthy food system cycle from seed to table. Throughout a building's lifetime, the materials, energy, and water used - as well as the waste created - are integrated into a complete lifecycle that considers the needs of local communities.

The distinction between regenerative, resilient, and sustainable approaches lies in their intention. Whereas a regenerative approach seeks to optimize viability through renewal and abundance, a resilient approach incorporates modular and flexible elements designed to react quickly to change, and a sustainable approach aims to maintain a system over the long-

term. Regenerative systems are designed to thrive; resilient systems are designed to adapt to change; and sustainable systems are designed to maintain themselves through continual re-use over long periods of time. A regenerative approach incorporates the flexibility of resilience and the re-use characteristics of sustainability. The intent of a regenerative approach is one of optimism based on the remarkable ability of life to prevail and thrive.

Designing tools that facilitate our transformation into a thriving future calls for creative solutions that support human activities while enhancing other living systems. The LENSES Framework beautifully incorporates a regenerative approach by focusing on the values, resources, and systems that promote positive outcomes for our communities. This new approach is marked by a shift in perspective: from doing less harm to doing more good; the glass isn't just half full, it's overflowing. Instead of minimizing humans' negative impact on the Earth, LENSES supports positive developments that yield thriving, integrated outcomes for people and for nature in perpetuity. This shift in perspective is the first step in creating a compelling vision of a future that we can all embrace and work together to achieve.

Let's get going!

Andrés R. Edwards

Founder, EduTracks

Author, "The Sustainability Revolution," "Thriving Beyond Sustainability," and "The Heart of Sustainability"

# preface

CLEAR supports sustainability professionals in practicing regenerative development, helps business leaders reshape how they do business, and educates students to embrace regenerative thinking. We provide changemakers with tools and resources to create and nurture Living Environments within their businesses, organizations, and communities.

## CLEAR's Vision ::

An ecologically, socially, and economically thriving world

## CLEAR's Mission ::

To cultivate, empower, and equip changemakers to create a regenerative future

The LENSES (Living Environments in Natural, Social, and Economic Systems) Framework is a celebration of life. A celebration created by people like you for people like you who are seeking a deeper approach to creating a better world.

Colorado State University's Institute for the Built Environment (IBE) initiated the development of LENSES, which originally focused on the built environment, in 2007. IBE soon recognized the potential for more broad application of the Framework, and embarked on forming the Center for Living Environments and Regeneration (CLEAR) to further research and disseminate the LENSES Framework. Since that time, CLEAR has developed a suite of supporting resources including the LENSES Overview Guide, Facilitator Manual, Rubrics Workbook, and Facilitator Training.

As you begin to apply LENSES to your own work, you will most likely find that while it offers a structured format, the process of applying the Framework can easily be tailored to your project's specific needs.

Like the regenerative development movement, LENSES is ever-evolving. We're committed to the continued development of LENSES to increase its value to professionals like you. Should you have questions, comments, or feedback, please share them with us at [info@clearabundance.org](mailto:info@clearabundance.org).

Kindly,



Josie Plaut  
Executive Director



Brian Dunbar  
Chairman of the Board

# about this manual

If you're reading this guide, you're probably hungry for change - whether you're a working professional seeking to implement progressive solutions or a student passionate about making the world a better place.

## Using This Manual

The LENSES Facilitator Manual provides tools and resources to lead your organization, community, or project in creating Living Environments. It begins with an overview of regenerative development and the LENSES Framework, orienting you to the purpose of the LENSES and defining key concepts. The body of the manual walks you through a series of sequential steps and associated activities that are the heart of the LENSES process. These intentional steps and activities will guide you through facilitating your own LENSES project. The manual concludes with additional resources and definitions to enhance your facilitation skills and your understanding of regenerative development.

This Facilitator Manual is intended to support individuals who are enrolled in, or have completed the LENSES Facilitator Training Program. It is not for general distribution. This manual is printed on 100% post-consumer recycled paper.

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# Part 1

introduction to  
regeneration



# the challenge

As we confront the challenges of the 21st century, our approach to complex environmental, social, and economic conditions will determine our future. While commendable, most of today's sustainability efforts tend to focus on reducing negative environmental and social impacts. As a society we have an opportunity, if not a pressing need, to move beyond the mindset of solving problems and shift our focus toward the potential for creating health and vitality.

The fundamental shift in perspective moves from doing things better, to doing better things. Instead of primarily focusing on solving or minimizing humans' negative impacts, we start to envision and create ways for humans to enhance and contribute to thriving, living systems across the globe. This shift in perspective is the first, and most important, step in creating a compelling vision for a future that we can all embrace and work together to achieve.

# regenerative development

## **Regenerative Development**

Regenerative Development is the process of cultivating the capacity and capability in people, communities, and other natural systems to renew, evolve, and thrive. It is not about maintaining what is, or restoring something to what it was. Rather, it is about creating the capacity for ongoing development toward increasing states of health and vitality.

Regenerate ::

To bring new and more vigorous life. Creating greater vitality, viability and capacity for ongoing evolution

## **Living Environments**

Living Environments are settings that are thriving, healthy, and resilient because their ecological, social, and economic systems relate in ways that elevate individual and collective vitality.

A great example of Living Environments are the communities involved with Interface Carpet's Net-Works program, which provides economic incentives for seaside communities to remove abandoned fishing nets from ocean habitats and then uses the reclaimed materials to produce commercial carpet tiles. The Net-Works program creates local economic opportunities focused on restoring ecological health, while greatly reducing raw material needs for carpet manufacturing.

# key concepts of regenerative development

**Working in Wholes, Not Parts:** The world works as systems of nested wholes, not as a bunch of pieces and parts. Through seeing and working with wholes, we come to understand the interconnections and relationships that are essential to effectively engaging people, places, and organizations.

Regenerative business leader Carol Sanford describes whole systems this way: “When a seed is dropped into healthy soil, it is nurtured by the whole soil system and the larger ecosystem within which the soil is nurtured. The seed grows into a mature plant, contributing food to the larger system and dropping more seeds into the soil. Looking at the plant in random moments or studying one or another of its phases cuts it into non-living parts. In the same way, looking at organs of the human body independently of their lives as whole beings nested within a human who is nested within a neighborhood within an ecosystem on a living planet is misapprehending them as static, partial objects and thus missing the full reality of their being. This narrow perception of living beings makes it almost impossible to grasp the complexity of living systems in ways that would enable us to make truly regenerative contributions to our communities and the larger wholes within which they are nested.”

**Being of Service:** Being of service is about becoming indispensable to a larger whole – just as your heart is indispensable to you, we seek to become indispensable as professionals in our work, as organizations to our customers and industry, and as communities to our larger geographic region. We are more likely to succeed when we fill a critical need and others see us as necessary for their success.

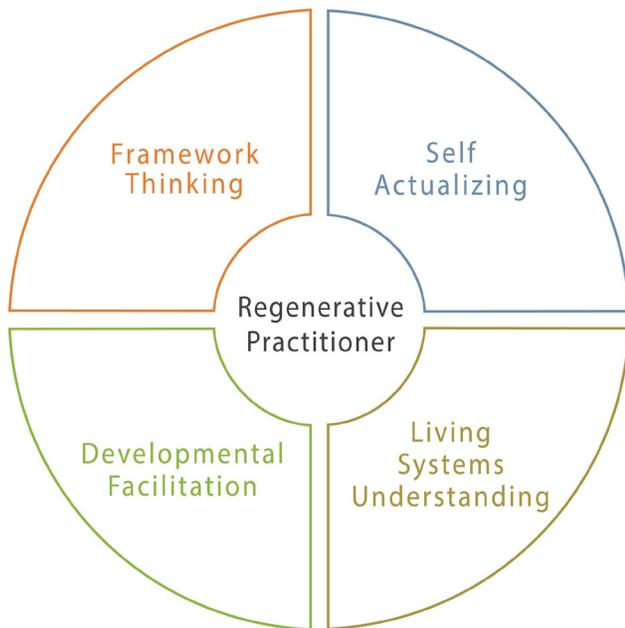
**Account for Uniqueness:** Every place, organization, or community has its own unique qualities and patterns. Through working to understand and connect to uniqueness, we become increasingly able to activate authentic, inspired change across natural, social, and economic systems.

**From Separate to Aligned with Nature:** Humans are embedded in, and dependent upon, natural systems; yet, many of our activities deplete and compromise the very systems that we depend on for survival. By recognizing and appreciating our intimate relationship with natural systems, we have the opportunity to explore and realize how humans can be positive contributors in natural systems. This journey begins with learning from and following nature, and then emulating and enhancing nature’s processes.

**From Problems to Potential:** Regenerative Development involves recognizing opportunities increase vitality and viability at every turn. Instead of focusing on solving problems, we shift our focus to realizing potential. Just like each child has their unique potential and characteristics, so does each place, organization, and ecosystem. While problem solving plays a useful role certain situations, focusing on potential opens up our projects and endeavors to a whole world of possibility, and more importantly, relevancy.

# becoming a regenerative practitioner

The practice of leading regenerative development, or being a regenerative practitioner, calls for a diverse and expansive set of knowledge and competencies around four core areas: Frameworks and Mental Models, Living Systems, Human Dimensions, and Facilitation.



*Regenerative Development Competency Model – Under development through a partnership with CLEAR and the Institute for the Built Environment at Colorado State University.*

**Frameworks & Mental Models:** Examining and ultimately developing understanding, discernment, and discipline for frameworks and mental models is essential to the practice of regenerative development. Adept use of frameworks helps to define, develop thinking around, and bring order to inherently complex systems.

**Living Systems:** Disciplines including evolutionary biology, biomimicry, and permaculture help practitioners understand the core operating principles of life itself. Understanding and embracing humans' roles as actors within earth's living ecosystems enables greater capacity to see both where to intervene and how to transform the human relationship within that system to be one that is beneficial and generative.

## **Human Dimensions:**

The technological solutions for addressing social, ecological, and economic issues already exist. The greater challenge is addressing the values, mindsets, governance systems, and behaviors that prevent such solutions from adoption. The disciplines of developmental psychology, sociology, governance, and human behavior bring light to the challenges and opportunities that practitioners must address in order to affect change. Practitioners who improve their understanding of how individuals and communities operate and evolve are better equipped to address the challenges and opportunities that exist when working to shift human systems.



**Facilitation:** Effective facilitation is the capability to guide individuals and groups toward shared understanding, breakthrough, and evolved thinking. Skilled facilitators identify what and how to develop individual and collective thinking, create and hold space for group transformation, lead divergent and convergent thinking, and help establish systems for action planning and ongoing management. Facilitation is a dynamic and adaptive process that creates opportunities for groups to transform their thinking, understanding, and capacity.

Together, the above competency models represent the expansive understanding and capability that one develops over time. Conscious and continual effort are necessary to develop individual and collective capacity for understanding and applying the four competencies successfully. Regenerative development requires that we constantly regenerate our own thinking, comprehension, and ability to sense what is emergent, what is essential, and where the potential exists to evolve ourselves, our communities, and other living systems.

# the lenses framework

The LENSES (Living Environments in Natural, Social, and Economic Systems) Framework is designed to guide teams through the regenerative development process. LENSES is a structured process where facilitators guide individuals and groups in exploring and realizing the potential for capacity building and benefit creation. It is not a checklist or a rating system, but rather a facilitated step-by-step process and management system for regenerative development. The process is strengthened by the visual framework that leads users through systems thinking in a way that is accessible and directly applicable to a project's needs.

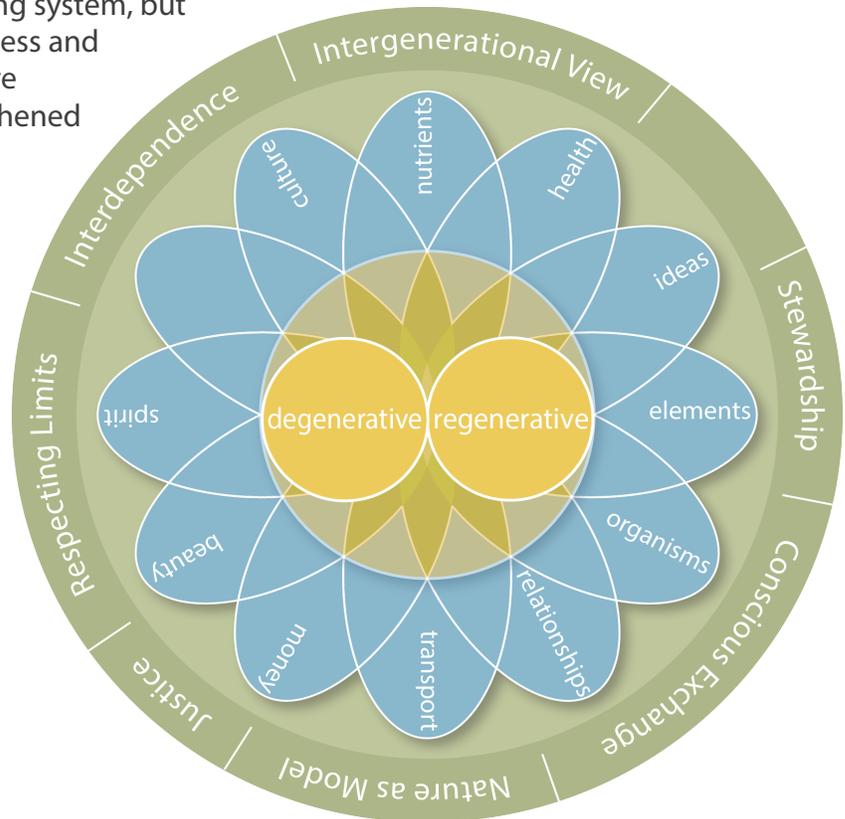
LENSES can be used at many scales, especially for projects and organizations that are place-based, meaning that they are working within the context of a specific location and with the intention of increasing the systemic capacity to evolve and thrive.

Application types include:

- master plans
- building projects
- community engagement & capacity building
- business development and strategy
- special projects or initiatives

LENSES is most effective when used at the conceptual or renewal stage. Examples include:

- planning to restore a neighborhood
- developing a new building
- starting or revitalizing a community collaborative
- guiding a retrofit or remodel
- improving a floundering program



# notes





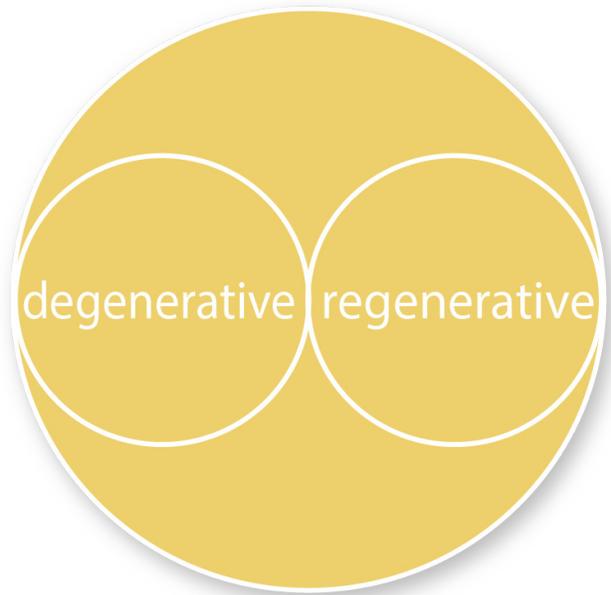
# Part 2

introduction to  
lenses

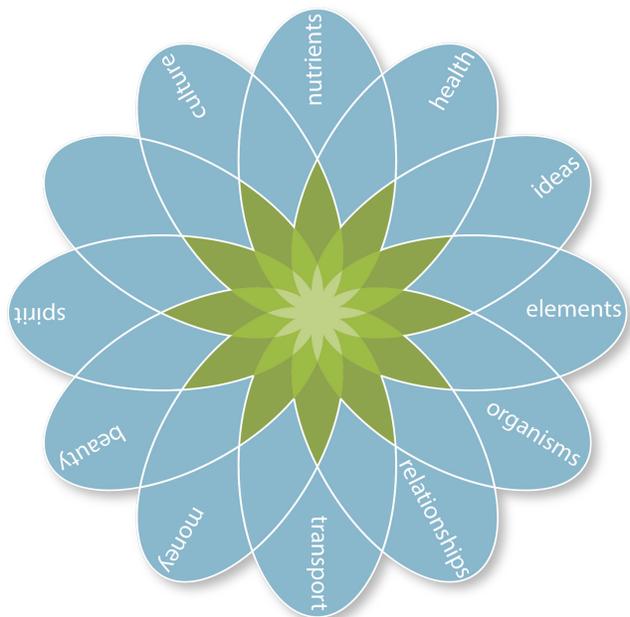
# the three lenses + the whole framework

The LENSES Framework is a system made up of three interrelated lenses. Each lens has a unique function and serves as a visual aid to help ground concepts and activities, and together the three lenses help teams see the whole and identify regenerative potential. The Flows and Foundation lenses each include a blank space that allows and encourages users to account for concepts that are unique to their place or project.

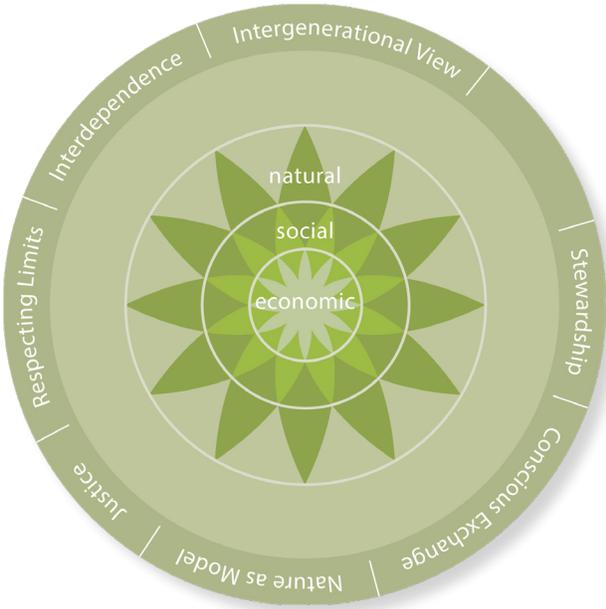
**Vitality Lens:** The Vitality Lens, while simple in form, encompasses a variety of concepts for the team to develop and reference over time and helps to identify degenerative and regenerative aspects of the project. When used in conjunction with the Flows and Foundation Lenses, it helps to identify key leverage points and initiatives.



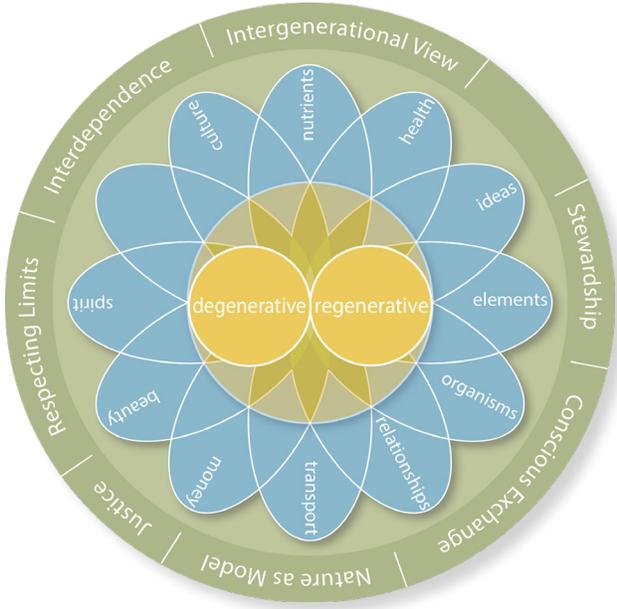
**Flows Lens:** The Flows Lens graphically represents interrelated aspects of a system that make up the whole. Teams use the Flows Lens to explore how each of the twelve “flows” move in, through, and out of people, a place, or an organization. Assessing how these flows move and change over time, with a focus on key patterns and relationships, cultivates a deep understanding of context.



While users are encouraged to define what the terms on the framework mean in the context of their project, basic definitions for all terms are included in the Glossary.



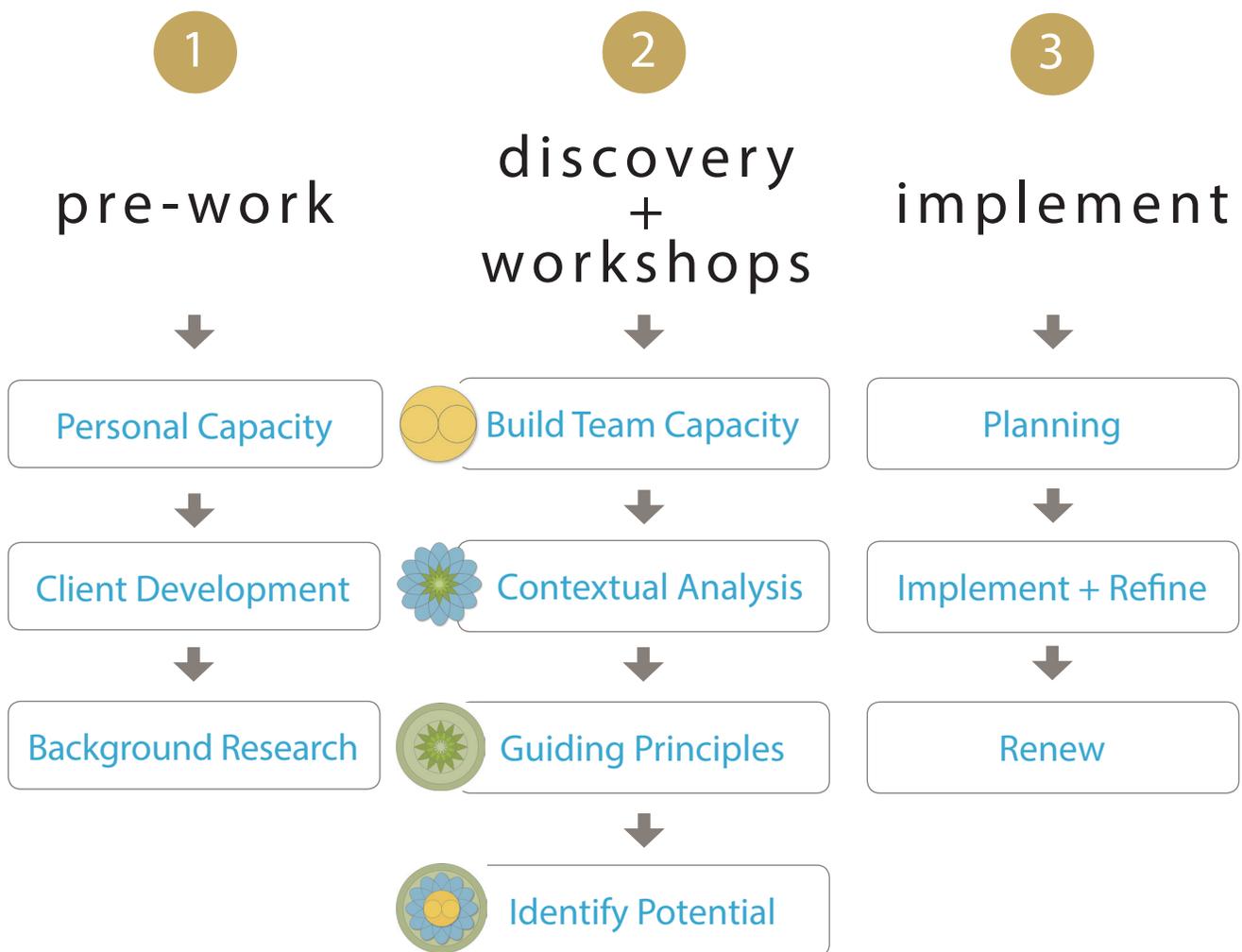
**Foundation Lens:** The Foundation Lens is designed to engage users in creating a shared sense of commitment. Teams work together to define guiding principles within the context of their work. The results are a unique set of values and commitments that serve as a foundation of understanding – a place to return to – for inspiration and guidance on decision making.



**Whole Framework:** The complete LENSES Framework, augmented and informed by the specific, local context, helps teams to see the whole, identify powerful key initiatives, and keep the vision alive over time.

# lenses process in action

The process of applying the LENSES Framework consists of three primary phases: Pre-Work, Discovery and Workshops, and Implementation. Together, these phases constitute a comprehensive system for ongoing regenerative development. Using the LENSES Framework, while presented in a linear fashion, is an iterative process and facilitators adapt their approach to meet the unique needs and of a project. For example, some projects may choose to work on establishing guiding principles (a Foundation Lens activity) prior to conducting flows assessment (a Flows Lens activity).



# facilitated workshops

**Facilitated Workshops:** A cornerstone of applying the LENSES Framework includes holding facilitated workshops and/or team meetings where participants complete activities and exercises with the LENSES Framework. The number of workshops, length, and participants will vary depending on the scale and scope of the work. Workshops are often run iteratively as more information is collected. Some workshops may focus on a specific topic or a particular audience, while others may be about broad stakeholder engagement. It is up to facilitators to determine what is most needed and when. For example, workshops held with core team members may differ from ones with community members. The objectives, however, are consistent.

A full section dedicated to workshop design and facilitation starts on page 87 – feel free to check it out now. Regardless of the order, it's important to address all aspects of the LENSES Framework for a successful project.

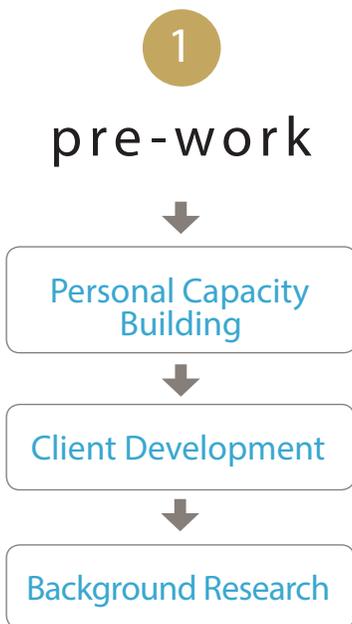
# purpose, process & outcomes by phase

Each phase of the LENSES Framework has a particular purpose, process, and intended outcome. Regardless of the exact order, or even the exact exercises that are outlined in this manual, the chart below represents the overarching concepts and intentions of each phase of the LENSES Framework.

		PURPOSE	PROCESS	OUTCOME
pre-work	→	Capacity building; client and/or community relationships	Personal development; inquiry, empathy	Capability; trust; aligned intentions; relationships; value propositions
discovery + workshops				
 Vitality Lens	→	Build team capacity for regenerative thinking	Team workshops, activities, and exercises	Increased levels of discernment and team capability
 Flows Lens	→	Develop deep place-based contextual understanding	Inquiry, research, discovery	Documented turning points, relationships, & site analysis
 Foundation Lens	→	Explore guiding principles and vision	Team workshops and activities	Defined principles for guiding decision making
 Whole Framework	→	See the whole; identify potential	Reflection	Identify direction, focus, plan for action
implement	→	Effective interventions, action, adjustment and renewal	Action, testing, project management, learning	Increased system capacity and capability; evolution of vision

# notes

# lenses process: pre-work



The Pre-Work phase is carried out early as a means to develop personal capacity and contextual understanding. It is a learning journey that builds personal capacity and capability as a regenerative practitioner, develops trust from clients and communities, and engages the participants in meaningful project work.

## **Personal Capacity Building:**

Pre-Work begins with the facilitator developing an initial understanding of systems thinking and regenerative development (see the Regenerative Development Competency Model above, page 6).

Gaining a foundational understanding of regenerative development is an essential (and ongoing) step for any regenerative practitioner.

In addition to the Facilitator Manual, The LENSES Rubrics (found on page 96) and the Vitality Lens are helpful for grounding and guiding the facilitator's thinking and understanding of regenerative concepts.

## **Client/Project Development:**

Building a reputation as a regenerative practitioner involves honing your ability to speak clearly about regenerative development and its value proposition, so that you are able to gain the trust of and align intentions of potential partners. In addition to the content in the LENSES Facilitator Program, external resources on networking and relationship building are available through LENSES Practitioner Program.

**Background Research:** Background research is conducted to become familiar with pertinent history and context, including relevant current issues and trends. This can be done through mixed methods including internet searches, interviews, site visits and community walks, reviews of past reports, photographic surveys, social media, audio recordings, etc.

# notes

# lenses process: discovery + workshops

2

## discovery + workshops



During the Discovery and Workshops phase, facilitators and participants work together to apply the LENSES Framework. LENSES workshops typically last for one to three days, although the number and length may vary depending on the scale and scope of the work. Workshops can be run iteratively as more information is collected. It may be appropriate to discuss different content or dive deeper into a topic with different audiences involved at each iteration. For example, workshops held with core team members may have a different focus from ones with community members. The objectives for each lens, however, remain consistent, regardless of approach.

During the Discovery and Workshops period, facilitators and participants will complete a series of activities that address the following objectives.

### Vitality Lens: Build Team Capacity

**Build Capacity:** Introduce and begin working with the key concepts of living environments and regeneration to develop the capacity and capability of the team to start thinking and working with the idea of regeneration. Referring to the LENSES Rubrics may also be helpful at this stage.

### Flows Lens: Contextual Analysis

**Identify Stakeholders:** This phase builds upon existing efforts and adds new ideas for identifying who to bring into the conversation and how to best engage them. Stakeholders may be anyone (or anything) who may serve as a resource, informant, advocate, inspiration, and benefactor for the project. Remember that not all stakeholders are human beings and your awareness and inclusion of stakeholders should grow over time.

**Flows Analysis:** The context analysis builds upon the background research from the Pre-Work and is a continuation of seeking to understand the unique qualities, characteristics, and essence of a particular place. Teams use the Flows Lens to work through a series of interactive and comprehensive activities to identify turning points over time and to deepen their understanding about the relationships between flows (e.g. culture, nutrients, natural elements, money, etc.).

## Foundation Lens: Guiding Principles



**Guiding Principles:** Once the team understands context, they develop guiding principles and commitments based on the terms on the Foundation Lens and the learnings from all prior activities. The guiding principles create alignment of core values and are revisited throughout a project as a cornerstone for process and decision-making. Guiding principles also ensure that original intentions are met and outcomes align with the group's vision of success.

## Whole Framework: Identify Potential



**Identify Potential:** After participants gain insights and grounding from the prior activities, they work collectively to identify key opportunities and develop strategic initiatives with actionable steps for generating vitality and realizing potential.

# notes

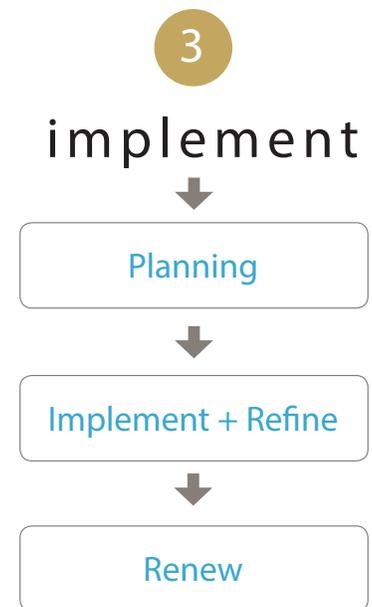
# lenses process: implementation

The concepts and strategies created through the LENSES process are carried forward during the Implementation phase. Ideas and plans are tested through Implementation and adjusted accordingly. The guiding principles and commitments identified in the prior phases serve as the basis for decision-making and evaluation.

**Planning:** Based on the strategic initiatives, guiding principles, commitments, and vision developed at the end of the Discovery and Workshops phase, the team creates a set of work plans. One work plan is developed for each strategic initiative, guiding participants to identify leaders, key partners, objectives, strategies, timelines, metrics of success, and desired outcomes.

**Implement + Refine:** Teams work together to test, implement, and manage the strategic initiatives. It is important that teams reconvene at regular intervals to reflect on and evaluate progress, adjusting course if needed. Lessons learned and new perspectives gained from implementing the initiatives are integrated into the Work Plans and mid-course refinements are made as needed.

**Renew:** Periodically, it is important to take a big step back and regenerate our thinking. This is different than the ongoing refinement that happens during Implementation. Typically, the need for renewal will naturally occur every one to three years, especially after making significant progress or if new developments appear. Teams may choose to work through the entire LENSES process again or focus on a select number of activities.







# Part 3

lenses  
pre-work



# overview of pre-work

The goal of the Pre-Work phase is to gain the capability and capacity to do regenerative projects including personal development, relationship building, and opportunities for regenerative work, including several ongoing endeavors related to personal and professional development. Pre-work also includes the initial contextual research and inquiry done prior to securing a project. Note that there is some overlap between this activity and the Flows Analysis Activities.

## Purpose

Develop personal and professional capacity, capability, and opportunities for place-based regenerative work.

## Process

**Personal Development:** Develop personal knowledge, skills, and abilities that are required for becoming a regenerative practitioner (reference Regenerative Development Competency Model on page 6). Through personal and professional development, we strengthen our skills to communicate about regenerative development and to elicit trust from those we work with.

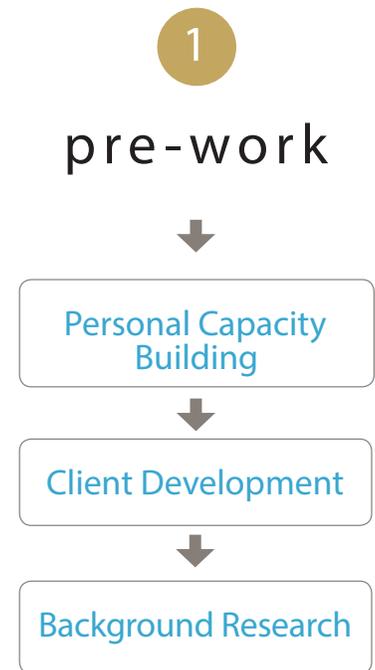
**External Considering:** A subtle, yet necessary, aspect of being a regenerative practitioner is sensing and understanding client or community needs and latent potential. This is done through developing the ability to listen deeply, understand relevancy, and to inquire with an open mind.

## Goals & Outcomes

**Agency, Capacity, and Capability:** Greater capacity to work on and facilitate regenerative projects, increasing levels of ability to communicate about living environments and regeneration, and to entice others to want to do regenerative work.

**Trust and Relationships:** Earn the trust and confidence of clients, community members, and other project partners to see you as a resource and as a regenerative practitioner.

**Projects:** Secure work with clients, communities, and other projects that are interested and aligned with working regenerative work.



# personal development

## Objective

Develop personal and professional capacity, capability and opportunities for place based regenerative work.

## Duration

A lifetime

## Approach

- Education
- Develop a community of practice
- Find a mentor, or three
- Develop command of the key concepts of living environments and regeneration

## Considerations

In addition to the Facilitator Manual, the LENSES Rubrics located on the CLEAR website, and the Vitality Lens are helpful for grounding and guiding the facilitator's thinking and understanding of regenerative concepts. An example of a LENSES Rubric for Community is located on page 83 of this manual.

# client and/or project development

## Objective

Build reputation as regenerative practitioner, secure regenerative projects

## Duration

Ongoing

## Approach

- Build relationships
- Take steps outlined in the Personal Development section
- Develop command of the key concepts of living environments and regeneration such that potential clients see value for their projects
- Utilize resources developed by CLEAR such as LENSES stories that are relevant to potential projects and clientele

## Considerations

The LENSES Practitioner Program is available to those who have completed the Facilitator Program. In this program professionals from diverse backgrounds meet regularly to share methods and practices for cultivating clients who are interested in a regenerative approach to their projects. Best practices, value propositions, and real-world projects are shared in this forum. Talk to your instructors or reach out of [clearabundance.org](http://clearabundance.org) for access to the LENSES Practitioner Program.

# pre-work activity 1: background research

## Notes

### Objective

Conduct background research to become familiar with pertinent history and context, including relevant patterns and trends and key stakeholders. Background information is best obtained using various methods including internet research, informal interviews, reviews of past reports, site visits, photographic surveys, audio recordings, social media, etc. The goal is to gather sufficient background and foundational information to help define the scope of work, initial identification of stakeholders, and to design the initial team meetings, workshops, and additional contextual analysis. Engage with a curious mindset and sharpen your skills of observation. Look for themes and patterns.

### Duration

Varies, depending on project, typically 5-10 hours

Background Research		
Key Questions (select / modify as relevant)	Resources	Key Learnings
<i>What is the natural history?</i>	<i>Local historians; Museums; Books; Historic Photos; Geologists</i>	
<i>Why did/do people, animals and plants come here?</i>	<i>Interviews; Ecological Experts</i>	
<i>What are the economic drivers?</i>	<i>Interviews; Economic Reports</i>	
<i>Where is here?</i>	<i>Site / Community Walk; Aerial photos</i>	
<i>What do people love about this place?</i>	<i>Interviews</i>	
<i>Who or what seems to be overlooked or underserved?</i>	<i>Site walk; Interviews</i>	
<i>What are the conflicts?</i>	<i>Interviews; Newspapers</i>	
<i>Other?</i>		
<i>In just a few words, describe the key themes and patterns:</i>		

***Approach***

1. Determine which key questions and methods are most relevant.
2. Gather information.
3. Synthesize information and prepare for sharing at Workshops.

Note: These activities are typically done by 2-3 individuals working together, but may be done as a larger group if desired and time allows.

***Considerations***

The point of this activity is to start to ground the project in its historic context and to identify key patterns, issues, and stakeholders. The investigators must use an inquisitive and open mind to develop a fundamental understanding of context. Abilities in pattern recognition are also important so that the inherent characteristics and qualities of the project start to reveal themselves.





Part 4  
discovery  
+  
workshops

# introduction to discovery + workshops

During the and Workshops phase, facilitators, team members, and other participants conduct analysis and come together to for a series of workshops.

The workflow and exact structure of the Discovery and Workshops phase can be altered to best fit the project's timeline and the participants' schedules. For example, contextual assessment and research can be conducted by a small core team, or through a workshop setting. Workshops can occur over consecutive days or throughout a longer span of time. Workshops typically last for one to three days, although the number and length may vary depending on the scale and scope of the work. LENSES Facilitators have reported success in conducting a series of workshops: the first to introduce concepts and conduct a flows analysis; the second at a later date to develop guiding principles and designs, strategies, or processes; and a third to finalize plans. It is also important to incorporate regular feedback loops and reporting so that participants involved early or late in the process can stay up to date.

Regardless of the exact format, the objectives of the LENSES research and workshops are consistent. Teams will complete activities to create an in-depth analysis of the project's context, determine guiding principles, and identify potential regenerative development opportunities.

## Introduce Key Concepts

Before introducing regenerative concepts to participants from the Vitality Lens, it is important for the facilitator to become very comfortable with sharing ideas and leading a group exploration. It is helpful to ensure that everyone is grounded and centered, with an open heart and mind. We recommend opening the workshops with a centering + awareness and/or listening + communication exercise, located in the appendix. The LENSES activities then begin by using the Vitality Lens and Degenerative/ Regenerative Fulcrum to introduce the concepts of regenerative development and living environments to ensure common understanding.

Workshop & Process Design ::

More on workshop design, facilitation and reporting is included in Part 6 Designing & Facilitating LENSES Workshops.

Reporting ::

Each facilitator will need to determine appropriate recording and reporting activities. The LENSES activities in this manual are designed to be directly transcribed into digital form, though teams will need to determine the best format for recording and communicating background research and analysis. Further, some teams may wish to create a dashboard that helps convey and track key pieces of information.

## Contextual Analysis

The Flows Lens is then used for an in-depth analysis of a project's context, which is built upon the background research completed during the Pre-Work phase. The focus on context extends beyond obvious boundaries to include the larger community. Flows can be physical or conceptual (e.g. nutrients or culture). Consider the following questions: What nutrients exist here? What is the flow of these nutrients? Historically? Today? Where do they come from, and where do they go? How will the flow of nutrients be altered by this project? How can they be enhanced? The goal is to determine historic and current patterns and identify the key relationships that developed because of those patterns. From that understanding, we develop a sense of the essence of the space – how a place works and why it is important to the greater whole. Understanding these factors is essential for identifying the key leverage points for catalyzing beneficial change.

## Guiding Principles

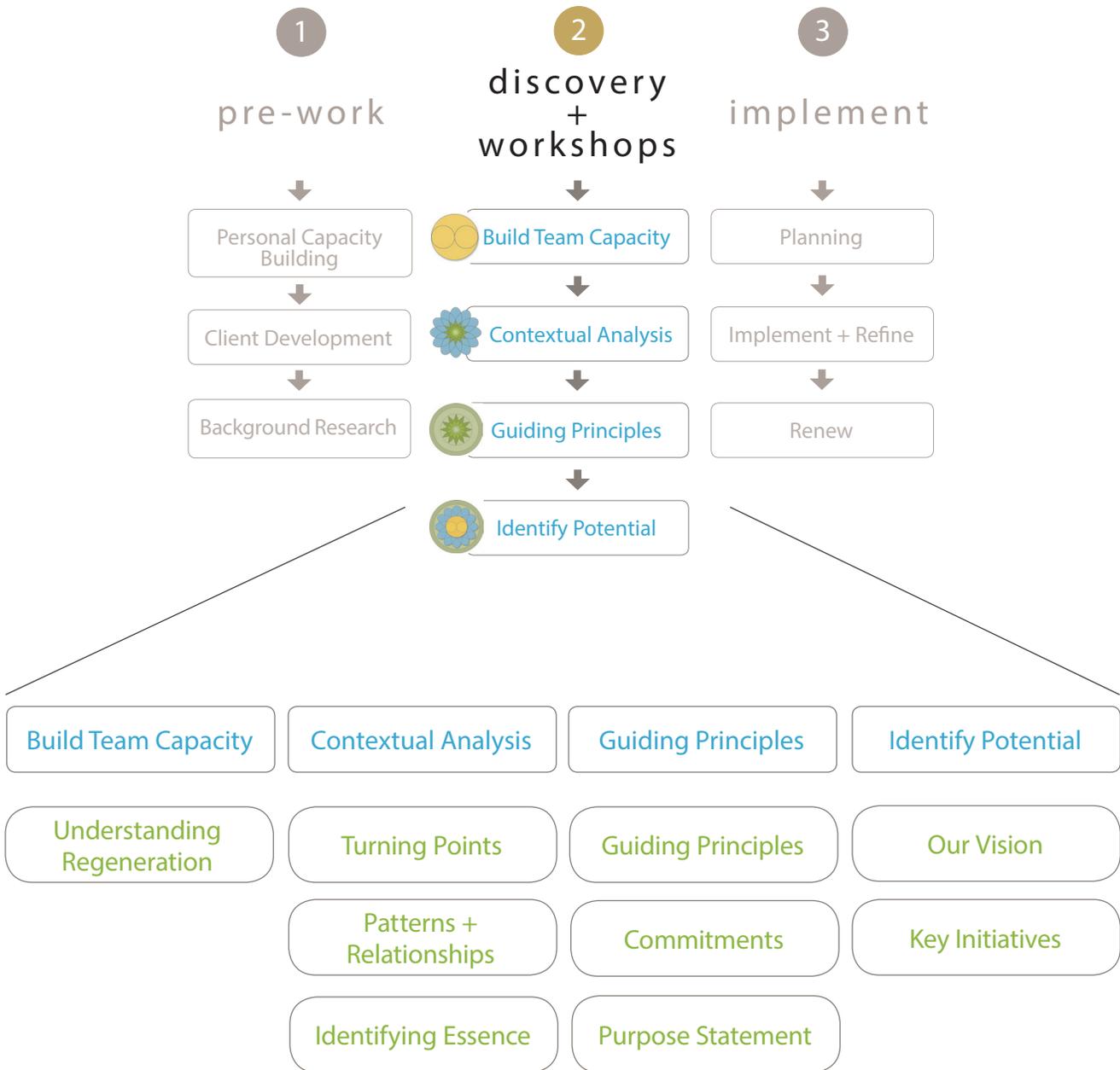
Typically after the Flows Analysis, the next series of activities focuses on the Foundation Lens and establishing guiding principles, though in some instances, the team may choose to start with developing guiding principles. Guiding principles serve as a ground for decision making throughout the life of the project, ensuring that the goals and vision stay true to the principles set by the group.

## Identify Potential

The third part of the Discovery and Workshops phase envisions the whole LENSES Framework, bringing together the concepts from the Vitality Lens, the understanding from the Flows Lens, and the Guiding Principles from the Foundation Lens to explore and identify the overall vision and regenerative development potential for the project. With the whole in mind, the team creates a vision, generates big ideas, identifies the primary initiatives, and actionable steps for regenerative development.



# discovery and workshops activities



# overview of vitality lens

discovery +  
workshops



Vitality  
Lens



## PURPOSE

Build team capacity  
for regenerative  
thinking

## PROCESS

Team workshops,  
activities, and  
exercises

## OUTCOME

Increased levels of  
discernment and  
team capability

## Overview

In a team or workshop setting, the facilitator will introduce the Vitality Lens, which identifies concepts of regeneration, degeneration, and Living Environments to develop increased capacity for regenerative development. The key concepts of regenerative development, the Degenerative/ Regenerative Fulcrum, and the Levels of Work are all good starting points. Referring to the LENSES Rubrics may also be helpful at this stage.

This stage is about developing personal and team understanding, capacity, and capability for doing regenerative work. While simple in form, it represents the key concepts embedded in regenerative development. Facilitators must gain a working ability to understand, communicate, and lead a group through exploring regeneration.

## Purpose

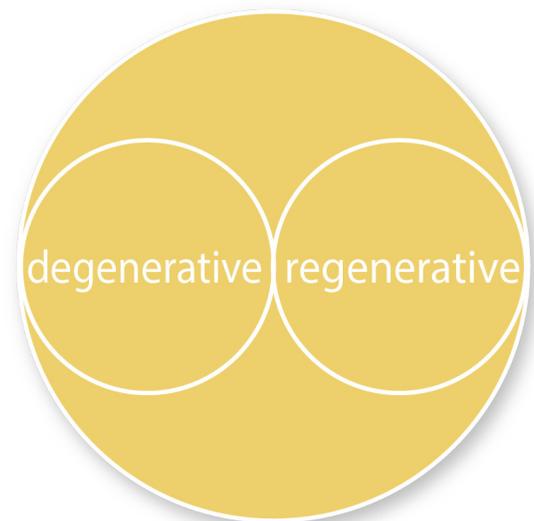
Build collective capacity for regenerative thinking

## Processes

Team activities and exercises

## Outcomes

Increased levels of discernment and capability to see and explore regenerative work.



# Degen, Regen Fulcrum

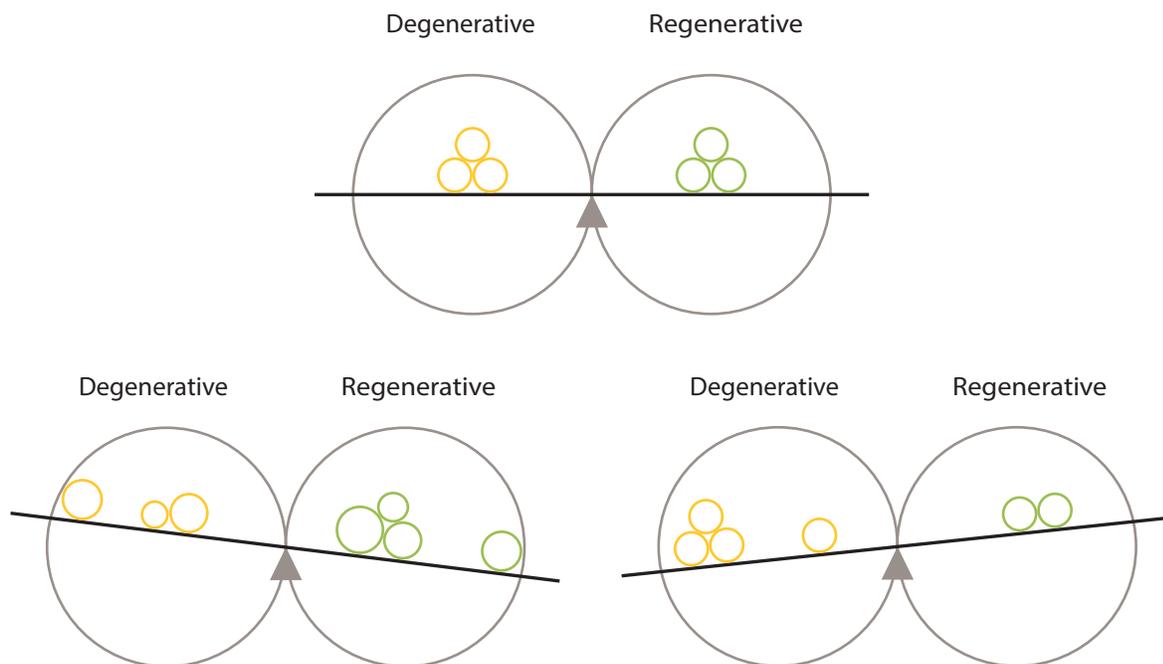
**Regenerative:** To bring new and more vigorous life. Creating greater vitality, viability and capacity for ongoing evolution

**Degenerative:** Compromising or degrading functionality or capacity; harmful

Most communities, organizations, and projects have processes or qualities that are degenerative and regenerative. It's not likely that any project, company, or other endeavor is all one or the other, but it's helpful to think about and reveal both.

The idea can be demonstrated by the fulcrum model illustrated below. The orange and green circles represent degenerative and regenerative attributes, respectively, from an activity, process, or decision. For example, if your job consistently takes more than it gives, and barely pays enough to make it worthwhile, then the scale is tipped to the degenerative side. Alternatively, if your job routinely nourishes your personal and professional wellbeing, then it would be tipped to the regenerative side.

Depending on the circumstances, the ability to measure outcomes on the fulcrum can be difficult to impossible. Regardless, exploring the fulcrum as a mental model is a meaningful way to understand implications of our actions, for better or worse.



*Co-developed with Max Zahniser, The Sustainability Nexus.*

# levels of work

This section is adapted from Cohere's publication, "Reinventing Sustainability: Creating Net Positive and Regenerative Futures."

While somewhat similar in appearance to the Degenerative/Regenerative Fulcrum, Levels of Work is different in concept and construct. Unlike the Fulcrum, the left side of the framework is not seeking to identify things that are degenerative. Instead, each level of work is important to the functioning of a system. Each level offers unique value and has a role to play in shaping a better future. The value of understanding the Levels of Work, is in being able to identify and distinguish between the levels, thereby allowing for greater degrees of clarity and specificity around regeneration.



Image credit compliments of Cohere, "Reinventing Sustainability: Creating Net Positive and Regenerative Futures"

**Compliance:** Meeting society's minimum standards for environmental and social protection (e.g. building codes, water quality standards, etc.).

**Efficiency:** Voluntarily going beyond society's minimum standards to do less harm (e.g. green rating systems, low-toxicity cleaning supplies, recycling, water and energy conservation, etc.).

**Net Positive:** Making an overall positive contribution to society, the environment and the global economy, seeks to understand good practices (e.g. B-Corps, Living Buildings, wetland restoration).

**Regeneration:** Catalyzing systemic transformations that results in increased levels of vitality, viability, and capacity to evolve (e.g. Regenerative Development, community capacity building, an innovation hub that enables local businesses to simultaneously increase the social and ecological health of their town).

The levels of work shown above are particular to the conventional sustainability or green movement. The Framework, however, is adaptive and works for other industries such as health care, communications, and organizational development.

# vitality activity 1: understanding regenerative concepts



## Notes

### Objective

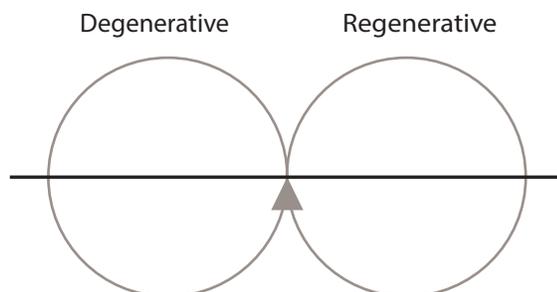
The purpose of this activity is to ground the abstract concepts within regenerative development. Upon completing this activity, participants should gain the following understanding:

- the relationship between sustainability and regenerative development
- the difference between degenerative and regenerative
- where to place different types of outcomes on the fulcrum model and/or levels of work– to further deepen understanding of the difference between degenerative and regenerative
- what the optimal outcomes of regenerative development can be, i.e. Living Environments
- how these concepts relate to their project, organization, or themselves

### Duration

60 - 90 minutes

Understanding Regenerative Concepts	
Concept	What It Means to Us
<i>From Parts to Wholes</i>	
<i>Being of Service</i>	
<i>Account for Uniqueness</i>	
<i>From Separate to Aligned with Nature</i>	
<i>From Problems to Potential</i>	



### Approach

1. Review the definitions of Regenerative Development and Living Environments.
  - a. Regenerative Development: the process of cultivating the capacity and capability in people, communities, and other natural systems to renew, sustain, and thrive
  - b. Living Environments: Living Environments are places that are thriving, healthy, and resilient because their natural, social, and economic systems relate in a ways that elevate individual and collective vitality.
  
2. Define the five principles of regenerative development as a group specifically as they relate to your project. See page 5 of the Facilitator Manual for general reference.
  - a. Working in Wholes, not Parts
  - b. Being of Service
  - c. Account for Uniqueness
  - d. From Separate to Aligned with Nature
  - e. From Problems to Potential
  
3. Come to a common understanding of degenerative and regenerative concepts:
  - a. Explore degenerative and regenerative concepts by drawing the fulcrum and/or levels of work image on a flip chart. Engage the group in a conversation about potential degenerative and regenerative outcomes. Consider giving the group a bunch of words or ideas and having them place them on the fulcrum and/or levels of work.

OR

- b. Lead the group in exploring one of the following three activities to ground the concepts and ensure common understanding:

### Mind Map

- i. Break participants into at least three groups; have no more than four people per group. Give each group a piece of flip chart paper and markers.
- ii. Assign each group one of the following words – “degenerate,” “sustain,” or “regenerate” (alternatively, you may use Levels of Work in this activity) – asking them to write the word in the middle of their paper in a circle.
- iii. Ask participants to do a free-form brainstorm, related to their project or community, of words and ideas that they associate with the core words “degenerate,” “sustain,” or “regenerate,” writing the related words/phrases in bubbles emanating from the central word. Completed mind maps will have continued branching of ideas.
- iv. After about 20 minutes, guide a 10-minute, full-group debrief. Ask the group if they noticed any shifts in their thinking. If appropriate, ask them to share some of the ideas that they came up with and guide the conversation to help discern the terms and/or levels of work.

### In My Life

- i. Ask each person to spend five minutes individually reflecting and writing about the fulcrum model or the levels of work framework as they relate to a topic in their personal and professional lives.
- ii. Break participants into groups of two to four.
- iii. Ask them to spend about 10-15 minutes sharing in small groups relating what they noticed in their personal reflection and how they have seen these concepts illustrated in the world.
- iv. After about 10 minutes, guide a 10-minute, full-group dialogue. Notice if there are gaps in the shared understanding and help to advance the collective understanding.

### My Definition

- i. Give participants five minutes to write down their definitions of “regenerate,” “sustain,” and “degenerate.”
- ii. Then guide a 10-minute group dialogue around their definitions to convey the definitions and differences between these core concepts.

### **Considerations**

This activity is best facilitated after introducing the concept of regenerative development and the fulcrum model or levels of work, but before introducing the LENSES Framework. The group will benefit from asking them to relate these terms to the project at hand or to their lived experience.

This activity has the potential to be a rabbit hole and cause some confusion if you are not well grounded in the concepts yourself. Prepare yourself by thoroughly reviewing concepts and definitions and carefully think through the activity so that you are well prepared.

### **Additional Materials**

The LENSES Facilitator Manual Glossary

### **Additional Exercises**

Prior to starting this activity is a great time to introduce some of the activities listed in the Additional Exercises starting on page 108. Consider one or two of the Awareness + Centering, Listening + Communication, Systems Thinking, or Team Building exercises to start the workshops on a light and positive note.

# overview of flows lens

discovery +  
workshops



Flows  
Lens



## PURPOSE

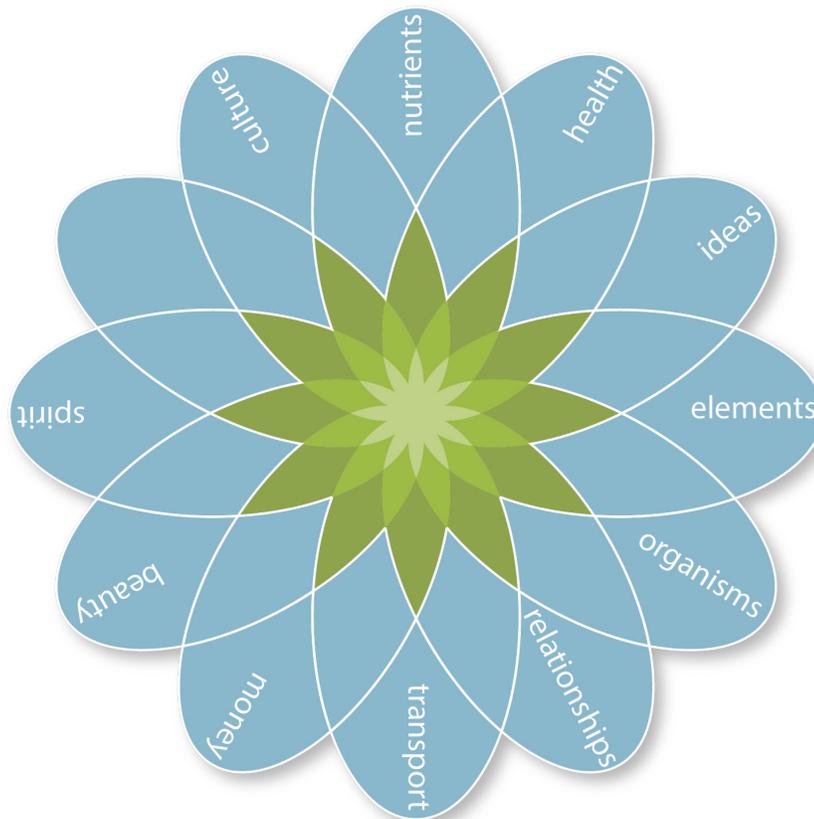
Develop deep place-based contextual understanding

## PROCESS

Inquiry, research, discovery

## OUTCOME

Documented turning points, relationships, & site analysis



## Overview

The Flows Lens is all about understanding context. Too often teams jump into projects without taking to the time to really understand place. The unfortunate result is that we end up following “best practices” that result in generic, big-box-style solutions, not taking into account the uniqueness of local context. Ecosystems and the species within them work as a collection of specific value adding roles and relationships. In order to become important to the larger systems, it is important to see the unique value-adding role that our project fills within the context of the larger system. The Flows Lens helps guide teams through the process of developing place-based contextual understanding. Just as knowing a person’s

unique potential, life story, and essence provides insights for a mentor to guide their professional development, so does each place have a unique history, a way of working, and value-adding processes that reveal the potential of a place. Local geology and climate serve as the foundation for local ecosystems, which in turn shapes the local culture, food systems, and economic drivers of an area. Through increased understanding of key patterns and relationships we have greater insight for creating projects that are more relevant, viable, and contributive - in a word, regenerative.

## Purpose

Develop place-based contextual understanding so that we are able to create relevant, viable, regenerative processes and interventions.

## Processes

A variety of methods and approaches may be utilized to gain perspective and insight about flows, relationships, and context. Possible sources of information include internet research, interviews, community and nature walks, museums, historic photos, maps, reports, economic data, site assessments, community historical knowledge, and subject matter experts. The Flows Lens is intended to help identify guiding patterns for how a place works and identify its essence. Well-chosen activities and assessment will ensure that participants look beyond the baseline level of information and start to see a greater whole. Flows Lens activities may be done as a small team and/or as a larger group activity. Small teams are able to go deeper into the materials faster, while engaging a larger team is helpful in building a greater collective understanding of the whole place.

Learning how to discover and read systems takes time and the best way to learn is through application.

## Outcomes

Deep understanding of context, seeing the whole as a living system.

# flows activity 1: identify stakeholders



## Notes

### Objective

The purpose of this activity is to identify key participants to engage in your LENSES project. Remember that not all stakeholders are humans, but that humans will need to represent any non-human stakeholders (e.g. birds, plants, soils, etc.) and that we seek to give voice to underrepresented populations (human and otherwise). Compiling the right team of people is a necessary step in gathering diverse perspectives and expertise that will help ensure desirable outcomes.

### Duration

45 - 90 minutes

Identify Stakeholders		
Role or Perspective	Individual or Representative	Method of Engagement
<i>Facilitator</i>	<i>Joe Smith</i>	<i>Core team meetings</i>
<i>Hispanic Community</i>	<i>Suzie Martinez David Castillo</i>	<i>Small neighborhood meetings, informational handouts, community feedback white-boards in front of project site</i>
<i>The River</i>	<i>Danielle Applegate</i>	<i>Interview with representative, site visit</i>
<i>Local Business</i>	<i>Boone Brown</i>	<i>Focus group interview, electronic survey, and/or phone call</i>

### Approach

1. Ask the group to brainstorm the roles and perspectives (stakeholders) that are important to include in this work. To help guide a discussion, pose the following questions:
  - a. Is there at least one person representing natural, social, and economic systems?
  - b. Are appropriate participants included to address the terms on the Flows Lens?

- c. Are appropriate participants included to address the terms on the Foundation Lens?
  - d. Which voices are missing or under-represented?
  - e. Is there a diversity of professions, age, gender, ethnicity, income, project users, community members, public and private sector members, and others, as appropriate?
2. Ask the group to identify individuals or groups who are able to represent the stakeholders identified in step one.
    - a. Identify individuals and their primary role or perspective.
    - b. Determine the appropriate time-frame or phase to include that participant.
  3. After a thorough brainstorm, review the chart with the group and make sure there is agreement on the outcomes.

### **Considerations**

Identifying stakeholders will happen naturally during the Background Research and investigators should always be keeping the question in mind. It is important to reflect on the stakeholder question prior to scheduling workshops and ensure that the list of stakeholders is inclusive and representative of the respective community. However, it is important to go through this activity to give the group agency to identify stakeholders you may not have considered.

If you are familiar with the RACI (Responsible, Accountable, Consulted and Informed) format, this may be a helpful addition to the chart.

# flows activity 2: turning points



## Notes

### Objective

Participants and the team will better understand context by examining significant milestones or turning points. A turning point denotes a pivotal historic or current event, which had a profound impact (e.g., a weather phenomenon, a cultural uprising, massive infrastructure changes, bankruptcy, etc.). This activity can be used to develop a narrative or story line for sharing with others. Perspectives and insights gained from the Turning Points activity will set the stage for planning beneficial goals and making contextually appropriate decisions.

### Duration

90 minutes

Turning Points*		
Turning Point (years)	Characteristics + Specifics	Important Flows
<i>Spanish Colonization (1519-1920s)</i>	<i>Cultural shifts, increased building, agricultural advances</i>	<i>Culture, Health, Relationships, Transport, Nutrients</i>

\*Note: This activity can be done across a long piece of butcher paper with the timeline horizontally across the top where participants use sticky notes to populate the timeline turning points, characteristics and flows.

### Approach

1. Document important turning points, or major shifts over time. Label turning points in chronological order, indicating the period that was characterized by the turning points. Describe the characteristics and relevant specifics of each turning point.
2. Ask guiding questions:
  - a. What transitions, developments, events, episodes,

- opportunities, or threats have been significant in shaping what exists today?
- b. What caused these shifts?
  - c. Which flows were influenced by the turning point?
3. Sometimes it's helpful to consider turning points for a particular flow. Refer to the Flows Lens or a complete LENSES Framework to use as a guide to ensure a holistic exploration and consider identifying which flows were of particular relevance for each turning point.

### **Considerations**

Any existing historic timeline may aid in identifying turning points, though it is good to go through this activity as a team or group to help elevate shared understanding of context. For teams looking to develop an online timeline, consider WhenInTime at <http://whenintime.com/> or similar resources.

### **Additional Materials**

Flows Lens graphic or handout, or complete LENSES Framework

# flows activity 3: patterns + relationships



## Notes

### Objective

Participants will understand the relationships between surrounding flows, eliciting systems thinking and revealing key interdependences and patterns that might otherwise be obscured or unnoticed. Understanding relationships and utilizing systems thinking are key steps towards developing contextually appropriate decisions.

### Duration

90 minutes

Patterns + Relationships		
#	Patterns	Key Relationships
1.	<i>Transport and culture repeatedly intersect throughout the history of this place.</i>	<i>As more foot trails were developed, men were gone for longer periods of time, allowing women to take a more dominant role in the community. There is an unrecognized relationship between transport and culture, which affects the roles and hierarchy of a community.</i>

### Approach

1. Find a place, ideally outside, to sit alone and consider the Turning Points outcomes, observe the surroundings, and think about flows for at least 20-30 minutes.
2. Consider the Flows Lens and Turning Points activity as a guide. Reflect on the following:
  - a. What is the life or capacity that each flow brings to the system?
    - i. For example, what life or capacity does the flow of water, an element, bring to this place (whether it's a physical space or a business idea)? What is water's relationship to the overall health of the whole? How does it relate to other flows (e.g. culture or transport)?

- b. Which flows relationships stand out to you as most important?
    - i. Consider combinations of two or three flows at a time. For example, how do transport, culture, and health interact and relate to each other?
    - ii. Consider the relationship and life giving capacity for as many flow combinations as time allows. Are there patterns between them that have repeated over time?
  - c. Identify the three most compelling combinations of flows.
3. Reconvene the group and facilitate a 45-60 minute debrief to identify the key patterns and relationships. Document discussion topics and breakthroughs on the chart. Identify the top 3-5 most important relationships among the flows.
  4. Ask a guiding question:  
Which patterns stand out as most vital, or life-giving?

### **Considerations**

Trace paper can be a great tool to visualize how flows interact and relate to each other. Place a sheet of trace paper over the project site map, or other relevant documents, and draw the patterns and movements of one flow. Repeat this exercise for as many flows as desired, using a separate piece of trace paper and color for each flow. Place the individual flow diagrams on top of each other to create a “3D” image of interacting flows.

If you are familiar with causal loop diagrams, you may wish to explore using them as a way to show the relationships between flows.

### **Additional Materials**

- Turning Points chart
- Printout of Flows Lens
- Spinning LENSES Frameworks (if available)
- Site maps at various scales (building, neighborhood, city, region)
- Contextual photographs
- Additional information or documents gathered during background research



***Additional Materials***

Completed Turning Points and Patterns & Relationships charts

# overview of foundation lens

discovery +  
workshops

PURPOSE

PROCESS

OUTCOME



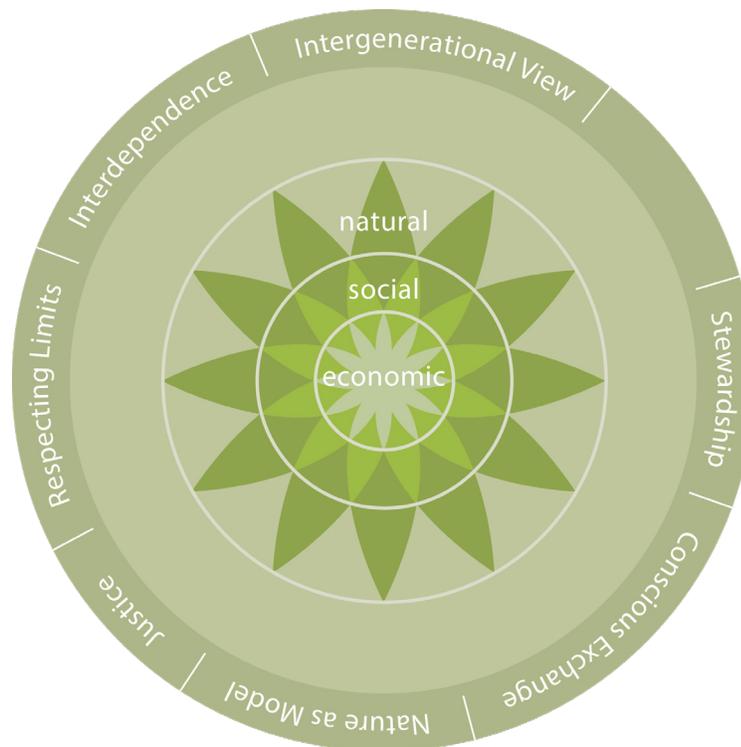
Foundation  
Lens



Explore guiding  
principles and vision

Team workshops  
and activities

Defined principles  
for guiding decision  
making



## Overview

The Foundation Lens helps groups to develop a shared set of guiding principles and commitments. Typically, it is preferable to work on the Foundation Lens after the Flows Lens activities have completed, though there are times where teams may choose to work on the Foundation Lens earlier in the project. The reason for waiting to work on the Foundation Lens is that the contextual understanding created during the Flows assessment will help to create richer and more relevant guiding principles. Teams may focus on each term on the Foundation Lens, choose which terms are most relevant to their project, and/or use the blank space to develop their own principles. At the center of the Foundation Lens is the nested triple bottom line: natural, social and economic systems. The nested bottom line shows the systems as they exist in the world, with economic systems fitting within social systems, and

natural systems encompassing both. These terms are present on the Foundation Lens to indicate that there are natural, social and economic aspects for each of the foundation lens terms.

Ultimately, the value of the guiding principles is only realized when they become ingrained into the thinking and decision making of the team and/or community. They serve to connect the strategic and tactical decisions with the higher purpose and aspirations of the team. Once the guiding principles are developed, the team can help ensure the connection to the principles over time. More information about how to stay connected to principles is in the Implementation section.

### **Purpose**

Develop shared principles and commitments that serve as a foundation and inspiration for initiatives, design solutions, and decisions.

### **Processes**

Guiding principles and commitments are developed through team and/or stakeholder workshops and activities, with refinement by an individual or a couple of team members.

### **Outcomes**

Defined, shared principles strong enough to guide decision making

# foundation activity 1: guiding principles



## Notes

### Objective

Participants will define what each of the Guiding Principles on the Foundation Lens mean for their project. The terms on the Foundation Lens are the guiding principles of sustainability and the intent is to ensure integration of the guiding principles in the foundation of the project. Guiding Principles, in this vein, may be added via the blank space on the Foundation Lens. The guiding principles serve as a foundation of understanding and values – a place to return to – for inspiration and guidance on decision-making throughout all phases of the project.

### Duration

60-90 minutes

Guiding Principles	
Principle	How It Relates to Us
<b>Stewardship</b>	<ul style="list-style-type: none"> <li>• <i>Honoring the financial contribution from our investors through careful planning and execution.</i></li> <li>• <i>Taking responsibility for our demands on local water systems by reducing consumption and supporting legislation and education for rainwater capture.</i></li> </ul>
<b>Nature as Model</b>	

### Approach

1. Give each participant a printout of the Foundation Lens image or a complete LENSES Framework as a reference.
2. Briefly review the concept of the triple bottom line, noting that it is a nested system. Encourage participants to consider how each guiding principle relates to natural, social, and economic systems as they move through the following steps.

3. Prompt participants to spend 5-10 minutes on their own to consider how each guiding principle relates to their LENSES project. Ask them to think about principles that could be added via the blank space.
4. Facilitate a report out, first asking the group to share any new guiding principles that they've identified. Then ask the group to share the relevance of each guiding principle (existing in LENSES or added via the blank space) as it relates to the project. Capture all ideas on the flipchart. Note: this can also be done with sticky notes where people post responses to each principle via sticky notes. It may become clear that some of the guiding principles stand out as being more relevant to your project than others. It is up to the team to edit the final list in a way that is most relevant to them.
5. Using the blank space: the group may choose to generate one or more guiding principles. Some teams will decide to create an entirely unique set of principles for their project. It is up to the facilitator to choose a method and process that best suits the specific circumstances of their project.
6. As time allows, briefly discuss anticipated ways in which these guiding principles will influence the project.

### **Considerations**

The LENSES process includes reviewing the guiding principles at regular intervals throughout the project to remind team members of their aspirations and create a sense of accountability for following through with the original intentions. Users will revisit the guiding principles during the Implementation phase and throughout the project.

### **Additional Exercises**

Participants may be mentally worn out after completing Guiding Principles. Consider facilitating an Awareness + Centering or Team Building exercise before starting the Guiding Principles activity (starting on page 108). A fun or reflective exercise can rejuvenate the group and give them some needed laughter or mental clarity.

# foundation activity 2: commitments



## Notes

### Objective

Team members develop a short list (3-5) of commitment statements to embed their guiding principles into their LENSES project. Commitments should be specific, powerful, impactful, and non-negotiable. Commitments may integrate more than one guiding principle at a time.

### Duration

45 minutes

#### Commitments

***We commit to serving the land and community around us by producing as much energy onsite as feasible.***

***We commit to prioritizing social and ecological benefit equally with financial profitability in all of our projects.***

***We promise to engage at risk youth in our programs.***

### Approach

1. Ask participants to identify specific commitments or promises for the project. These will often correlate with the guiding principles developed by the team. Long list all of them on a whiteboard or blank page, combine as appropriate.
2. Ask the group to prioritize down to 3-5 commitments. You may ask the group to each select their top three to see if patterns emerge.
3. Summarize the final commitments on the chart.

***Considerations***

Some teams will choose to create commitments and use them in addition to or in lieu of guiding principles. Similar to guiding principles, teams should review the commitments at regular intervals throughout the project to remind team members of their aspirations and create a sense of accountability for following through with the original intentions. Guiding Principles and/or Commitments should be revisited and revised often throughout the process and project.

***Additional Materials***

Guiding Principles chart

# foundation activity 3: purpose statement



## Notes

### **Objective**

Participants will develop a concise purpose statement for their LENSES project. This statement will emphasize the purpose of the endeavor and fundamentally answers the questions “Why do we exist? Or what is our purpose?” Short and to the point is best. Try limiting the number of words to twelve.

### **Duration**

30-45 minutes

Purpose Statement Brainstorm

Purpose Statement
<i>To...</i>
<i>In a way...</i>
<i>So that...</i>

### **Approach**

1. Ask participants to think through the following three questions. List these on the brainstorming chart:
  - a. What is the purpose of this LENSES project?
  - b. What is the transformation that we are hoping to realize?
  - c. What is the significance or impact of achieving the desired outcome?
2. The responses to these three questions can be used to complete a single synthesized Purpose Statement per the chart above.
3. Transfer the results to the Purpose Statement chart. Edit words as needed until there is general consensus. If you are working with a large group, consider breaking participants into teams and having them edit the purpose statement together, then report back to the facilitator. Guide the group through either voting or continual refinement until the group reaches consensus.

# overview of whole framework

discovery + workshops



Whole Framework



## PURPOSE

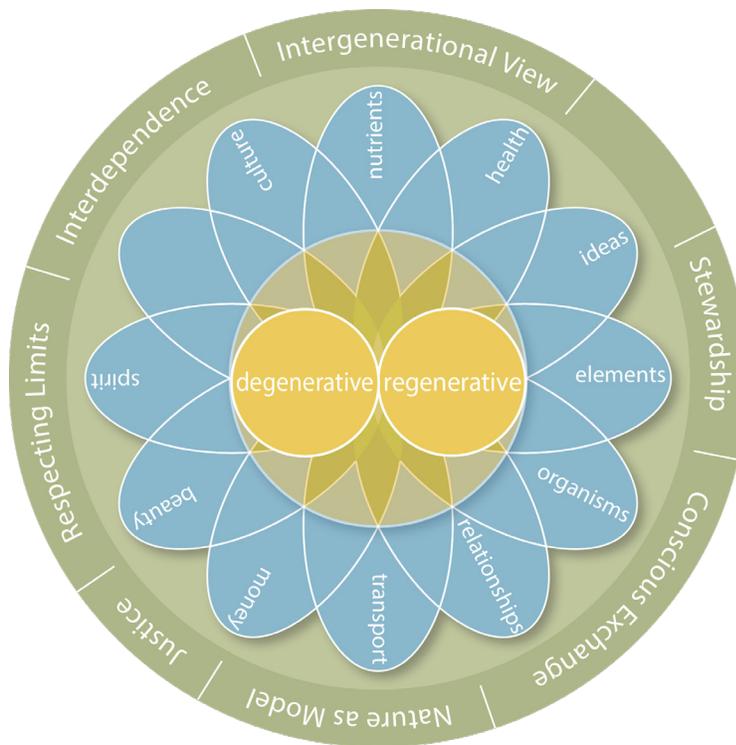
See the whole; identify potential

## PROCESS

Reflection

## OUTCOME

Identify direction, focus, plan for action



## Overview

Using the LENSES Framework all together is where the activities, insights, and work products from each of the three lenses come together as a whole and identify potential. The Vitality Lens grounds ideas for initiatives and activities in regeneration, the Flows Lens provides context and understanding of place as a living system, and the Foundation Lens provides the guiding principles to connect design and decision making to the team's higher aspirations. When using the whole Framework, combine everything that has been learned so far to identify the highest potential leverage points for creating regenerative benefit within the system.

## **Purpose**

See the place as a whole living system; identify initiatives and intervention points with the greatest potential for regeneration.

## **Processes**

Using the whole LENSES Framework requires slowing down, reflecting, and holding space for dialogue. Ultimately, it is about synthesis, though first there will be divergent thinking about the possibilities.

## **Outcomes**

Specific actionable initiatives and intervention points.

# whole framework activity 1: our vision



## Notes

### Objective

Participants will understand the current and future state of their LENSES project, including a vision and high-level strategies to fulfill that vision.

### Duration

45 minutes

Our Vision		
Our Vision	Our Current Reality	How We'll Get There
<ul style="list-style-type: none"> <li>• <i>Game changing impact</i></li> <li>• <i>"Pull" product</i></li> <li>• <i>Elevated community relationship</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Big vision</i></li> <li>• <i>Preliminary plan</i></li> <li>• <i>Competitive market</i></li> <li>• <i>Broken community relationships</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Community participation</i></li> <li>• <i>Hire A-Team</i></li> <li>• <i>Patience</i></li> </ul>

### Approach

1. Guide participants in thinking through each column above, listing answers as concise statements. Consider these guiding questions:
  - a. What is the current state of the LENSES project? What pieces are currently right, wrong, missing, or confused in the project?
  - b. What direction or state of being is the project moving towards? What do you envision happening in the short and long term? What is the desired future state of this project?
  - c. What resources exist to help achieve the vision? What high-level strategies will help the project move toward its vision?
2. Lead a group debrief to note any significant findings or realizations.

### ***Additional Exercises***

An optional visioning exercise that can be used in place of or in addition to this activity is Project Obituary, located in the appendix. This backward planning exercise helps teams to identify, overcome, and avoid potential project “gotchas,” by imaging that the project has failed, and why. This is often helpful for visioning and avoiding these problems.

Consider leading a quick Awareness + Centering or Team Building exercise, before this visioning activity, to energize the group.

# whole framework activity 2: key initiatives



## Notes

### Objective

Participants generate the Key Initiatives for how to achieve the project's vision.

### Duration

90 minutes

Big Ideas Brainstorm
<p><b>Net Zero Energy</b>  <b>Responsible Materials</b>  <b>Woodshop</b>  <b>Trail Systems</b>  <b>Cook stoves</b>  <b>Reforestation</b>  <b>Juice Bar</b></p>

Key Initiatives			
#	Initiative	Details	Team
1.	<b>Build Juice Bar</b>	<ul style="list-style-type: none"> <li>• Create market for local organic farmers</li> <li>• Provide health &amp; nutrition for guests</li> <li>• Management education and ownership program for employees</li> </ul>	<p><b>Robert Elenore*</b>  <b>Amelia</b></p>
2.	<b>Enhance Trail System</b>	<ul style="list-style-type: none"> <li>• Provide safe passage and increased health of pedestrians and cyclists</li> <li>• Improve appeal of non-motorized transport</li> <li>• Unite expatriates and locals in shared purpose to create community</li> </ul>	<p><b>Vivian John*</b>  <b>Tony Maria</b></p>
3.	<b>Ecological Enhancements</b>	<ul style="list-style-type: none"> <li>• Restore corridors for insects, especially pollinators</li> <li>• Work with local non-profit to engage and educate students in planting trees and other habitat</li> </ul>	<p><b>Rebeka Phillipe*</b>  <b>George</b></p>
4.			

\*Indicates team lead / responsible party

### Approach

1. Review all prior work with the team as a way to reflect and refresh on everything accomplished thus far. This is an important step, as this activity will guide the group in synthesizing the Discovery and Workshops phase results. Facilitate the group in brainstorming big ideas or strategies to bring the LENSES project from vision to reality. Ask the group what ideas, programs, or initiatives will manifest the regenerative potential into action? List the ideas using the Big Ideas Brainstorm chart.
2. Synthesize and highlight the most salient ideas, typically 6-12, depending on the size and complexity of the project. Consider the following guiding questions:
  - a. Which of these has the most potential for regenerative impact and/or has the most energy around it?
  - b. Which are most aligned with the project's commitments, purpose, and vision?
3. Transfer the synthesized list of big ideas onto the Key Initiatives chart. Typically, six to eight initiatives are developed, although a larger group may decide on as many as twelve. Edit or wordsmith each initiative name until there is group consensus.
4. Complete the details and team columns for each initiative, thinking through the goals of each initiative, responsible team members, and a team lead. The team lead is typically responsible for the success of an initiative, although other team members may provide substantial support and assistance.



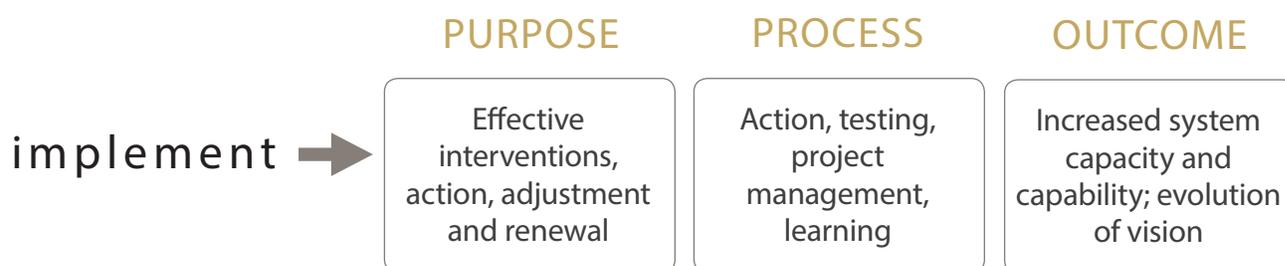


# Part 5

## implementation



# introduction to implementation



The third phase of the LENSES process is Implementation. The first step in Implementation is to develop the Work Plans for the Key Initiatives established during the Discovery and Workshops phase. Some teams may choose to develop Work Plans as part of a workshop process, while others may develop Work Plans in smaller groups. Work Plans include concrete goals, timelines, and actionable steps with which to analyze a project's progress and success. Teams meet regularly throughout a project to review Work Plans and gather feedback from team members. Work Plans may also be updated as new insights or developments occur.

Once a LENSES project is fully implemented and in operation, teams will continue to meet and evaluate project successes and lessons learned. This process of refinement is important to ensure that ideas adapt and evolve as they are tested through Implementation. The process of intentional reflection and learning is a critical step that informs the need for any changes, interventions, renovations, and Work Plan adjustments.

Embedded in the LENSES process is the cycle of renewal. Depending on the duration of the project, refinement may be all of the renewal that is needed; however, for longer, more complex projects a team will need to set aside time to revisit the activities in the Discovery and Workshops phase. This may come at major milestones (e.g. the transition of a project from one core team to another), or it may come on an annual or biannual basis. Such major junctures in a project's lifetime are critical points at which to reexamine the original LENSES context and goals. Revisiting the LENSES process can also occur after longer periods of time when a project naturally undergoes changes in scope or function.

## Processes

Developing action and/or work plans, learning through doing, project management, adjusting course, and renewal.

## Outcomes

Increased system capacity and capability, applied interventions, design, action, and evolution of vision.

# key concepts for implementation

## Keeping the will alive

One of the single most important activities of the implementation phase is the act and art of keeping the will alive. As the restraining forces of a project come to bear, too often teams can slip into compromise – compromising their vision and making decisions that are “easy” in the moment. The LENSES facilitator can initially take the role of championing the vision and kindling motivation, though over time this should become ingrained and embedded across the team. An essential part of regenerative development work is to develop a collective network of people, or shared ownership, for the vision and regenerative capability to live and evolve over time.

One simple way of keeping the will alive is to build connection and visibility to the Guiding Principles, Commitments and Levels of Work, especially during ideation and decision making. Posting visual reminders in conference rooms, printing graphic illustrations on agendas, and starting meetings or presentations with reminders are all good ways to help people continue their connection to the higher aspirations of the project.

## A Dynamic Living Vision

The vision for a project embodies the inherent, unique, and value-generating potential over time. Realizing the vision is essential to the success of the project, now and in the future. A vision is continually made real through the quality of consciousness and intention that we bring into every idea and action of the project.

### **Key Questions:**

How are we keeping the vision alive through our work right now?

Are we using the vision to foster innovation and creativity in our thinking?

What do we need to do today to enable the desired future to become reality?

### **Using Levels of Framework**

Using the levels of work framework can be helpful at many points during implementation. It can be a helpful resource when bringing new people into the conversation, though it serves as a good reminder for the team to keep thinking across the levels of work and help to discern the work that needs to be done at each level. Start conversations around Regeneration and work toward Compliance, not the other way around, and recognize that you will likely be working across levels simultaneously.

## Levels of Work Framework

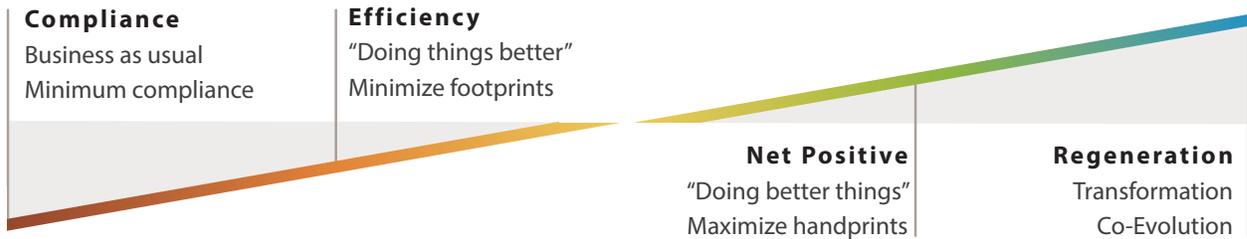


Image credit compliments of Cohere, "Reinventing Sustainability: Creating Net Positive and Regenerative Futures"

## Levels of Work Chart

The chart below can be used as a worksheet or hand drawn table during a variety of planning activities. The facilitator can ask participants to identify activities at each level that support a given initiative or effort. The levels of work framework and chart are referenced in the Work Plans activities below.

<b>Regeneration</b> Catalyzing systemic transformations through embodiment of the guiding principles.	
<b>Net Positive</b> Making an overall positive contribution to society, the environment, and/or the economy.	
<b>Efficiency</b> Going beyond compliance measures to minimize harm and negative impacts.	
<b>Compliance</b> Meeting minimum standards for environmental and social protection.	

# implementation activity 1: develop work plans

## Notes

### Objective

The purpose of this activity is to develop Work Plans for each Key Initiative. Depending on the project, this activity may be an extension of a workshop or it may be completed in the weeks following the Discovery and Workshops phase and LENSES Workshops.

Initiative leaders will lead their teams, as identified in the Key Initiatives chart, through the work planning. Teams should work with the Guiding Principles and/or Commitments during this activity. The Levels of Work framework can be helpful at this time as well, helping teams to identify what levels of work can and must be addressed (compliance, efficiency, net positive, and regenerative).

**IMPORTANT:** The facilitator will need to provide instruction to initiative leaders so that they can effectively complete this activity.

In both cases, Work Plans should be presented back to the larger group for collective input and refinement.

### Duration

90 minutes per initiative

Four Helpful Lists				
What is Right?	What is Confused?	What is Missing?	Known Resources?	Needed Action

Initiative Work Plan				
<b>Leader:</b>	<b>Plan Name:</b>			
<b>Team:</b>	<b>Today's Date:</b>			
<b>Objective:</b>	<b>Action Steps</b>	<b>Due</b>	<b>Resources</b>	<b>Accountable</b>
<b>Key Deliverables:</b>				
<b>Metrics of Success:</b>				
<b>Costs:</b>				

### Approach

1. Each initiative team will meet for a 90-minute session to complete the Four Helpful Lists and Initiative Work Plan charts.
2. Write down plan name (Key Initiative), date, leader and team.
3. Ask the team to review the Guiding Principles and/or Commitments and Levels of Work.
4. Review the Key Initiatives outputs from the Discovery and Workshops phase to help identify the objective, key deliverables and metrics of success (referring to the LENSES Rubrics may be helpful for thinking about metrics).
5. Lead the team through the Four Helpful Lists
  - a. Start with the question "What's right?"
  - b. Then let team members complete the next three questions:
    - i. What is confused about this initiative? What needs clarification? (Typically written in the form of a question).
    - ii. What is missing or should be added?

## Notes

- iii. What are the known resources that can be utilized for this initiative?
  - c. Based on the four helpful lists, identify action needed. Teams may create a longer list of action steps initially, but are encouraged to synthesize these into six to eight action steps.
6. Add the action steps, in a logical or sequential order to the Work Plan. Action steps should be summarized into one or two words and may have additional details and descriptions, as needed.
  7. Identify a due date and accountable party for that task. Similar to the initiative leader, there can only be one person accountable for each action step, and this person is responsible for its completion. The accountable team member can elicit the help of others to support the action step.
  8. Complete any known cost information.
  9. Once the Work Plan is complete, team members will share these with the entire team at a later date for feedback and approval.

### **Considerations**

If you are familiar with the RACI (Responsible, Accountable, Consulted and Informed) format, this may be a helpful addition to the Initiative Work Plan. Depending on the project and the team, there are many ways to accomplish the intention of this activity.

# implementation activity 2: review work plans

## Notes

### Objective

During this activity, the team works together to review initiative Work Plans. This promotes integrated thinking, whole group input, and generally advances the quality of the initiatives and work plans. Ensure connection to Guiding Principles and/or Commitments, and use the Levels of Work to help advance thinking.

### Duration

Half to full day

### Approach

1. Review Work Plans: Schedule a half or full day meeting with the team, depending on how many Work Plans need to be reviewed. This meeting is typically scheduled four to six weeks after the completion of the identification of key initiatives, typically in workshops.
  - a. Open the meeting by reviewing the results of the previous Workshop activities, consider including the LENSES Dashboard, if the team is using one (see sample Dashboard on page 96)
  - b. During this meeting, facilitate team members in presenting their Work Plans to the team. Have the Guiding Principles and/or Commitments and Levels of Work visible during this activity. Make sure that all fields are complete and allow time for group feedback, questions, and live editing.
  - c. Once all teams have presented their Work Plans, review the feasibility of the overall timeline for implementing the Work Plans. Ask questions such as: Are the plans properly resourced? Are the timelines realistic, especially when we see them all together? Is there a sequence of activities that makes sense? Adjust timelines and individual action step timelines as needed. The goal is to utilize collective intelligence, create shared priorities and to generate accountability for moving forward with the Work Plans.
2. Determine Meeting Schedule: Guide a discussion to determine how often team members would like to meet to review the Work Plans and Dashboard as an entire team. Individual initiative teams

## Notes

are expected to meet in between group meetings to complete action steps and update timelines.

3. Define Facilitator Involvement: As the facilitator, discuss your level of involvement in the regular meetings and overall management of the project with the team. They may want you to check in with them every six months or attend monthly meetings. Your involvement in the Implementation phase is up to the project team, budget constraints, and what is best for the project.

# implementation activity 3: implement + refine

## Notes

### **Objective**

The purpose of this step is to continue the regenerative learning process by taking time to reflect on progress made and integrate lessons learned into Work Plans.

### **Duration**

Two to four hours, at regular intervals

### **Approach**

1. Once efforts have been underway for a period of time, which will vary depending on the type and speed of the project, schedule a two- to four-hour meeting at regular intervals. Depending on the project, this aspect of the process may be incorporated into regular or ongoing project meetings. The critical point is that there is deliberate time to review and reflect on progress and lessons learned with the intention of making adjustments to the approach or to Work Plans as necessary. For example, if a particular engagement method isn't working, or a project partner cannot be identified, how do we need to adjust our approach? Ensure that invitees are representative of the stakeholders that were identified early on.
2. Review the Guiding Principles and/or Commitments and Levels of Work with team members, updating information as needed.
3. Ask the team to take 10 minutes to think about the work that has transpired and to identify what has been working, what is stalled, and what, if anything, is forgotten. Have them share with the group.
4. Have the team review and reflect on the Key Initiatives and discuss whether they are tracking according to plan, why or why not, and what adjustments are needed.
5. Continue meeting on a regular basis until there is a need for significant changes, interventions, renovations, or Work Plan adjustments, at which point the project will move on to the final phase of the LENSES process, Renew.

# implementation activity 4:

## renew

### Notes

#### **Objective**

A time of renewal occurs at major milestones or transitions (e.g. change of ownership, program implementation, completion of construction), or at predetermined intervals (e.g. annually). Teams will revisit the entire LENSES process, building on the prior efforts, to elevate the project based on lived experience.

This step may be irrelevant for very short projects (e.g. event planning).

#### **Duration**

One to two days

#### **Approach**

1. Revisit all LENSES work to date, including the initial deliverables (Pre-Work, Workshop results, Dashboard and Work Plans). Share available materials with participants.
2. Review the identified stakeholders and ensure that there is inclusive representation still present. Adjust invitees as necessary. This can also be a good time to bring in some fresh perspectives and people who may serve as guides, advisors, or visionaries.
3. Conduct the Workshops to build upon and gain fresh perspective and to elevate the collective efforts. Facilitate users in working through each relevant activity, ultimately renewing the commitments and initiatives to match the new level of work.
4. Update the Dashboard.
5. Develop or refine Key Initiatives and associated Work Plans.

# measurement and evaluation

Teams are often interested in measuring and evaluating their efforts. The approach for doing so varies widely across project teams and desired outcomes. Tools for evaluation often include quantifiable (e.g. increased biodiversity, increased use of trail system, improved soil or water quality, etc.) and qualitative metrics (e.g. high quality public engagement process, celebrating local heritage).

## Self-Developed Metrics

Teams may choose to develop project-specific metrics. A good starting point can be a combination of the Guiding Principles. It may help to use the Levels of Work to explore what metrics would be meaningful and relevant for the project. Key Initiative teams may elect to explore and define how to measure the impacts of their initiatives as they develop their Work Plans. There is a saying in the business world attributed to Peter Drucker that states, “What gets measured gets managed.” This statement can also be taken as a warning to be thoughtful about what gets measured, because it becomes a metric that people work toward. The team needs to thoughtfully consider what metrics and evaluation frameworks are appropriate and will ultimately serve the higher purpose of the project. Carefully choosing what to measure means that team members won’t get bogged down in details and metrics that don’t benefit the project.

Teams may wish to reference the instructions for the “Blank Rubric” below for a process to define metrics creation.

## Lenses Rubrics

The LENSES Rubrics provide qualitative, though generally quantifiable, metrics for identifying where a project or outcome falls on the Degenerative/ Regenerative Fulcrum. The Rubrics are composed of twelve charts and accompanying worksheets, one for each Flow on an older version of the Framework (see example Community Rubric on page 83). CLEAR does not intend to update the metrics to match the Flows on the v1 Framework at this time. Instead, we have decided to publish them as is, to be used as an open source resource for anyone interested in regenerative development metrics.

The LENSES Rubrics were developed by The Institute for the Built Environment at Colorado State University. A cadre of scientists, economists, researchers, and built environment professionals volunteered hundreds of hours to assist in developing this set of comprehensive metrics.

As a LENSES Facilitator, you may find the Rubrics useful at various times throughout the LENSES process. For example, consider reviewing them with your client, team, organization, attendees, etc. to:

- establish an understanding of what characteristics and qualities define degenerative, sustain, and regenerative

- pose thought provoking questions to spur deep inquiry and brainstorming
- guide teams in setting forward-thinking and holistic goals
- identify strategies to achieve those goals
- evaluate the potential impact of decisions
- acknowledge areas for improvement in existing projects, programs, or other endeavors

The LENSES Rubrics can be downloaded for free on CLEAR's website; [clearabundance.org](http://clearabundance.org).

# example community rubric

focal point	degenerate	-	sustain	+	regenerate
<b>Defining Community</b>	No attempt to identify stakeholders and/ or stakeholders are ignored; accepts pre-defined groups and pre-existing boundaries; no recognition of the scope and scale of impact to those being affected by the project; does not consider impacts of adding or removing services.	Minimal effort to identify key stakeholders; Self-selected participation; insignificant amount of research conducted on project's impact to surrounding community.	Key project team members and some community members are identified as stakeholders; existing and future community (e.g. aging community) is defined; minimal effort conducted to recognize project's impact on local social structures, economic situation, and environmental conditions.	Stakeholders include a diverse representation of community members; consideration for who and what is directly and indirectly affected serves as decision-making factor.	Stakeholders are intentionally chosen based on an accurate representation of the community; results in opportunities for those typically excluded from decision-making process; In-depth research on project's impact to natural, social, and economic systems serves as decision-making factor.
<b>Community Engagement</b>	Community intentionally or unintentionally ignored in decision making process; does not inform stakeholders of process or decisions; community does not feel represented due to discrimination, isolation, and lack of involvement.	Assumptions made to compensate for a minimal community engagement process; engagement only accessible to small, select groups; minimal outreach to inform stakeholders of process or decisions; artificial creation of safety and tolerance for community input.	Conventional public engagement processes (formal and legislated); Moderate amount of community participation and empowerment; Some effort made to inform stakeholders of process and decisions; limited or conventional populations feel safe in participating in the process; authoritative figures ask limited questions with limited sharing and listening.	Intentional and comprehensive community engagement process; diverse stakeholder representation; continual outreach to inform stakeholders of process and decisions; relationships are built between project team and community members; accessible and responsive avenues for community input.	Authentically seeks engagement and accurate community representation; creates opportunities for expanding representation and methods for involvement; continually informs and educates stakeholders using an established common vocabulary; actively creates safe and genuine avenues for stakeholder input; honors input with deep listening and responsive decision-making.
<b>Honor &amp; Opportunity</b>	Intentionally ignores local knowledge, resources, and cultural characteristics; violates or disrespects cultural values; Top down decision-making; decisions result in reduced opportunities for community members; implements one-time use functions; inflexible plans.	Unintentionally disregards local knowledge, resources, and cultural characteristics; makes assumptions about cultural values; top-down decision making; decisions driven by convenience and short-term needs; political will and business interests drive decisions over community voice; adapts only to keep things as they are.	Recognition of local knowledge, resources, and cultural characteristics; generic approach to honoring local community; decisions preserve options and opportunities; responds to change with new opportunities; mostly top-down decision making.	Promotes understanding, appreciation, and expression of local culture; implements measures to account for future growth and generations; adaptive design; resource sharing; bi-directional decision-making between project team and community members; increased opportunities for community members.	Celebrates and authentically incorporates local knowledge, resources, and cultural characteristics; iterative decision making model; seeks informed responses to grass-roots needs; shared understanding, pride, accountability, ownership, involvement, and responsibility among community members; provides and inspires opportunities for education and employment of community members.





# Part 6

designing and  
facilitating  
**LENSES**  
workshops

# designing workshops

Each project is unique and requires a tailored approach. A LENSES facilitator is responsible for designing the overall process as well as workshop agendas and activities to meet project-specific goals and needs of the project or team. Any workshops should be generative in nature, build capacity in project partners, elicit new ways of thinking, and tap into group intelligence.

## Keys for successful integrated workshops

The social structures and dynamics of project teams are one of the key factors in successful vs. mediocre teams. Another way of talking about this is called integrative process. According to research from the Institute for the Built Environment, successful teams have the following five principles:

**Diverse & Inclusive Membership:** In addition to a core team, include individuals with diverse and expansive knowledge and perspectives (see Identify Stakeholders activity).

**Connection & Communication across Team Members:** Develop a highly linked core team with a large periphery of diverse individuals and resources. The key is that communication is multi-directional and that there is shared ownership, vision, and understanding across the group. There is never just one person who “owns” the vision or is at the center of all activity and communication- such structures are unstable and unsustainable in the long term.

**Decision Making:** Decisions are informed by the whole. Depending on the construct of the project, there may be a core team who is making larger scale decisions, though it's important to recognize that decisions happen at many places and points in the system. The goal is that all of the decisions are aligned with the vision and guiding principles.

**Rules of Interaction:** Focus on learning and listening; no one person has full perspective. Ensure everyone is heard and respected and feels comfortable or familiar with each other. Make a conscious effort to connect people (and non-human stakeholders) across the entire system.

**3rd Party Facilitator:** Someone needs to tend to the process and guide the group interaction. While they should care about the quality of the outcomes, they should not be invested in a particular outcome. Without a good facilitator, groups typically fall to their lowest common denominator. A skilled facilitator moderates interactions to build trust, reciprocity, willingness to take risks, openness to learning, and even participation by group members. See the section below on facilitation.

*Adapted from Institute for the Built Environment, “The Social Network of Integrative Design”*

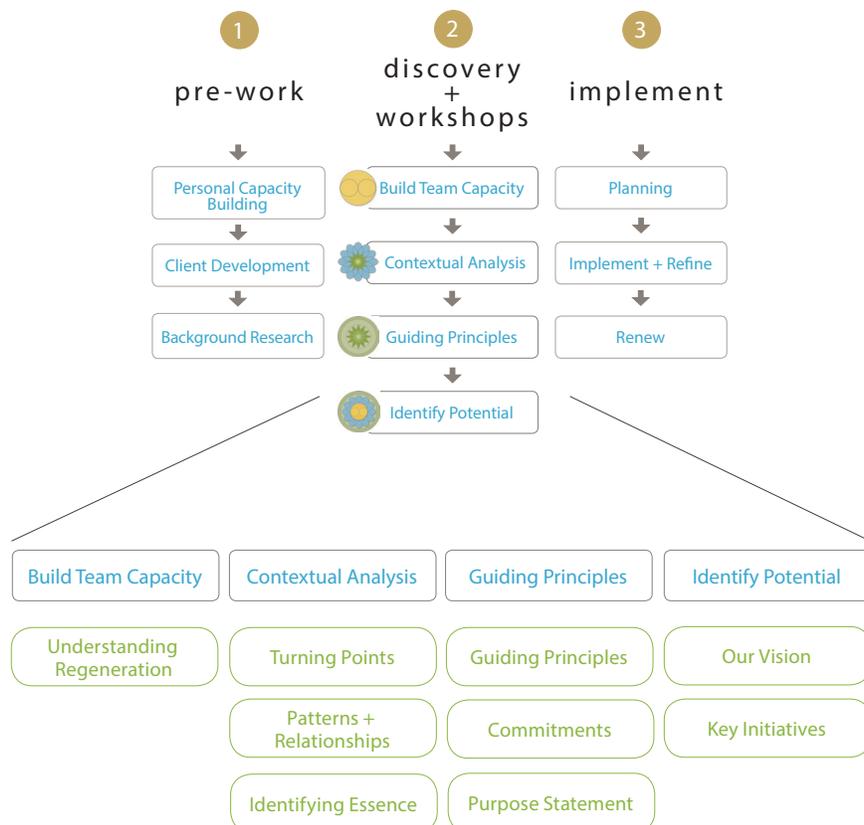
## LENSES Workshop Design

**Workshop Duration:** Workshop duration will vary depending on the scope of work, size of the project, and number of project partners. A small project scope with limited partners

may be able to accomplish its goals and needs with a half day workshop. A large project with complex and diverse project partners may need a 1-3 day workshop to reach its desired outcomes. Similarly, the frequency of workshops can also impact outcomes. Some projects are best served by consecutive workshops, while others may benefit from a series of shorter workshops over a longer period of time. Regardless of the frequency and duration, workshops are most effective when held during the early planning phases of a project.

**Selection and Flow of Activities:** Each lens is equipped with a variety of activities. As a facilitator, you get to choose which are best suited for the project. It is recommended that the facilitator first work through the Pre-Work activities, either alone or with a small team, before engaging the entire team and project partners in specific activities from the Discovery and Workshops phase. The Discovery and Workshops phase includes the highest amount of activities. It is up to the facilitator to determine which are best suited to meet the project goals and needs. Some projects will benefit from working through most of the activities, while others may only need a few to get them where they need to go.

As a reference, the graphic below outlines a suggested flow of activities. It is important to note that although the graphic indicates a linear process, facilitators often jump around between phases and activities in order to serve a project's unique goals and needs.



## The art and science of agenda development

Creating agendas is a skill that develops over time. While some of the skills for agenda development can be expressed on a page, it is a skill that should be honed over a lifetime. Here are a few key concepts to assist in agenda development.

**Well planned:** Go into each workshop or meeting with a clear set of objectives and a strong outline or agenda for the time together. Seek to understand client, core team, partner and/or stakeholder (team) needs, goals, and desired outcomes, as well as the higher potential that the team may not see. Work with the team to define the purpose of the meeting overall, as well as the purpose for each activity. Create a purpose statement for the meeting and or a list of objectives. Think about how the transformation that will occur – what will be different after? Seek to identify the regenerative potential of the workshop or meeting.

**Presentations:** Keep presentations, simple, direct, and to a minimum. Only provide information that is necessary to help orient people to the work at hand (for example, background research). Remember that the real value of having everyone together is to access the collective intelligence, understanding and wisdom that is in the room.

**Breaks & Unstructured Time:** People need breaks – both mentally and physically. Focused time should generally be one to two hours at a stretch. Allow time in workshops for people to be social, to be alone, to eat, to move, and to check in with their other life commitments. For longer workshops, make sure people have some “down time” where they can be alone, exercise, have a nap, etc., and some unstructured time to socialize (e.g. over meals, or at a campfire).

**Balance Reflective and Interactive Time:** It can be incredibly valuable to move back and forth between reflective and interactive time. Reflective time includes quiet reflection, journaling on a specific question, or silent site walks and observation. Reflective activities allow for people to look deeper into an idea or experience without the demands of interacting, and typically results in better responses. Interacting is any time that we are sharing or having a conversation. Work to balance the two.

**Opening and Closing Activities and Additional Exercises:** In addition to the LENSES Activities in prior sections of this manual, at the beginning of a workshop or even a meeting, it is important to help people become present – to leave behind whatever else is on their mind and to become awake to the work at hand. Similarly, at the end, it is important to help people feel a sense of closure or completeness. There are a variety of ways to achieve the objectives of the opening and closing activities, including the Additional Exercises starting on page 108.

The chart below includes an overview of the additional exercises. Read through each exercise and incorporate them into agendas, as you see fit, to provide a needed mental break,

promote connection among participants, re-energize the group, take a break, or encourage self-awareness and compassion.

<b>Type</b>	<b>Exercises</b>
Awareness + Centering	- A shared reading - Silent walk
Listening + Communication	- I am more like... - Provocative question
Reflection + Closing	- Mindshift - One powerful word
Systems Thinking	- Circles in the air
Team Building	- Rock, paper, scissors
Visioning	- Project obituary

# key facilitation practices

Facilitation is a practice that takes time and attention to develop. Leading the application of the LENSES Framework asks each of us to develop our facilitation skills. Facilitation starts with relationship building and understanding client or community needs, goals, motivations, and aspirations. It includes helping others to see potential that may be hiding below the surface, wanting to emerge. Facilitation includes process and agenda design, as well as facilitating a group interaction, and often includes generating reports, as well as the ongoing development and sometimes management of a team. There are many great resources and programs available to develop one's facilitation skills. The section below includes some key concepts.

## Creating and holding space

As a facilitator, one of your jobs is to create a safe space where everyone has the opportunity to contribute and to grow in a meaningful way (no pressure!). This means creating the space for individual and group discomfort, which is often temporary, but a necessary component of processing information, and can successfully play itself out if facilitated sensitively. In order to do this well, it is important to cultivate an inner steadiness and calm – the facilitator's energy, attitude, and approach is contagious.

In addition to being aware of, and cultivating, your inner space, become aware of how the group is functioning. Here are a few key things to notice and manage:

- Group energy level and engagement – are people present, checked out, energized, tired, frustrated, etc.
- Receptivity and listening – are people listening well? Are they receptive to each other's ideas? Are conversations balanced?
- Treat negative energy/feedback as an opportunity to better understand the anxieties, concerns, or fears underneath them; there is usually a gem of understanding that is wanting to surface.

And last, but certainly not least, remember to celebrate personal and group accomplishments. Highlight the distance traveled, the insights and outcomes gained, and the value of everyone's contributions.

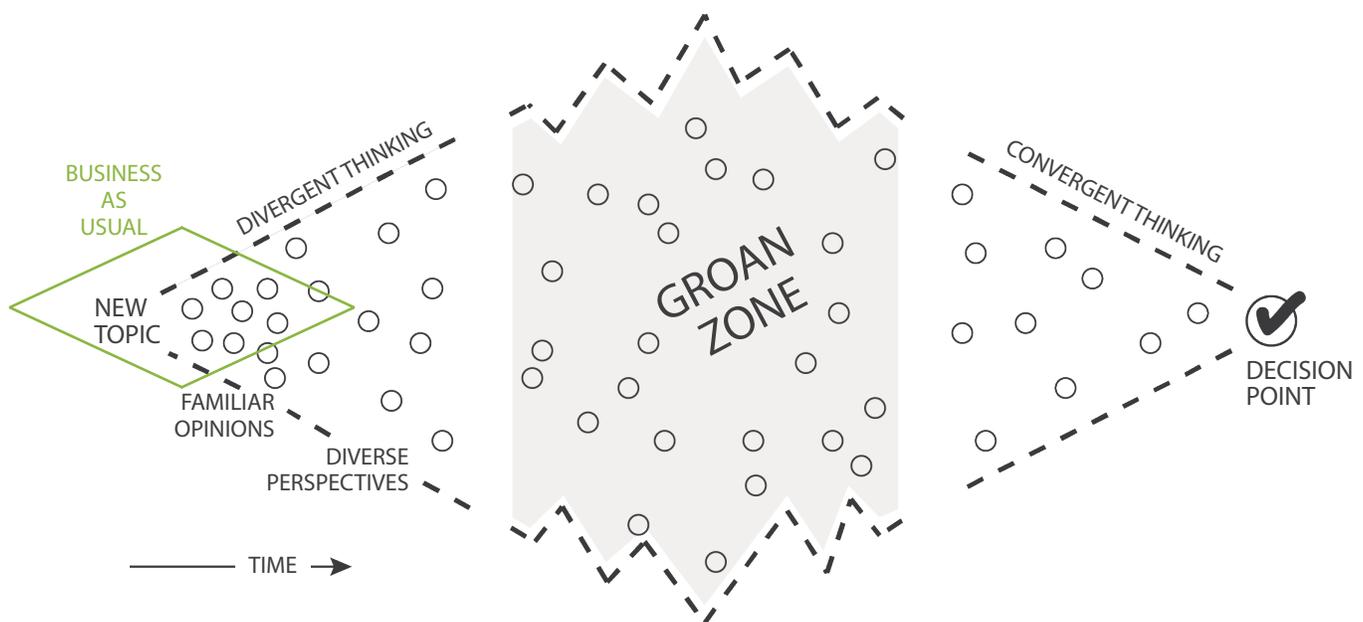
## Divergent and convergent thinking

Group understanding and shared direction is often achieved through cycles of divergent and convergent thinking. Divergent thinking is when we are increasing the number of ideas and convergent thinking is when we are narrowing down ideas in to the essential few. It is the facilitator's role to recognize and allow for this pattern to play out, as well as push the team to either diverge or converge at the appropriate times. The pattern of diverging and converging plays out on a macro and micro level with the LENSES process. The Discovery and Workshops phase follows a diverge/converge pattern as does the Implementation phase. Many of the individual activities follow the same pattern.

It is common for people to be uncomfortable with divergent thinking and there is a strong tendency in many groups to converge too quickly, thereby limiting ideas and creativity. The uncomfortable space is sometimes called the “groan zone” as depicted in the chart below. It is an important concept for the facilitator to understand, and it is often helpful to present this concept to participants at the beginning of a workshop. People are better able to manage the discomfort if they know it will be managed.

On the flip side, some teams can get stuck creating ideas, by not consolidating them into actionable direction, which can be incredibly frustrating. Again – it’s the facilitator’s job to be aware of and manage this dynamic.

**Groan Zone** – allowing the discomfort, not jumping too quickly to solutions, but making sure to converge.



*Groan Zone - Facilitator's Guide to Participatory Decision-Making, Sam Kaner 2014*

### Ground rules

Whether implicit or explicit, the facilitator helps to establish normative behavior for interaction within the group. Facilitators sometimes make the mistake of assuming everyone is operating from the same rules of engagement. Sometimes that is true of a group (especially if they have worked together before) and sometimes a lack of ground rules can create unneeded conflict and a tense environment. Whether the facilitator offers a set of ground rules (e.g. be present, be respectful, be open) or invites the participants to generate their own rules, setting ground rules early in a workshop helps establish how the group will think and

interact together. When developed collaboratively with the group, the activity can help begin interaction and group participation.

Another way to create fair and inclusive participation is to incorporate a variety of mediums for feedback: group discussion, individual writing activities, small group activities (3-5 people if possible), etc. Some people may feel comfortable sharing opinions in front of a group of people, while others are more likely to open up with a small group or one-on-one.

### **Encourage active listening from all team members**

Active listening is a communication technique used in counseling, training, and conflict resolution. It requires that the listener fully concentrate, understand, respond and then remember what is being said. Active listening can be encouraged by listing it as a ground rule and/or facilitating a listening/communication activity early in the workshop.

#### *Proactive listening practices:*

- Pay full attention & show that you are listening
- Don't interrupt each other
- Ask clarifying questions, don't make assumptions
- Trust our best intentions & don't take things personally
- Be candid, open, and honest in our responses
- Be inclusive, gathering perspective from all
- Work through disagreements and won't let them fester

#### *Responding to tensions*

Identify that things are getting tense & ask that everyone takes a breath. Ask, "Is this the right time for this conversation?"

- If no, then agree on a time, place and people to address the issue
- If yes, slow down and
  - Affirm: Thank them for bringing up a hard topic, express your appreciation for the value they bring to our team
  - Listen: Practice active listening, give them your full attention, don't interrupt
  - Summarize: Ask, "What I heard you say was [summarize], is that correct?"

### Flexible facilitation

Despite excellent planning, the workshop or meeting will almost never go as planned. Whether an activity just takes the group longer than expected, or the conversation takes an unexpected direction, it's the facilitators job to decide which conversations to let happen and when to move (or even push!) the group forward, especially if the group is getting sidetracked. Pay attention to the energy in the room and in yourself to help decide when it's time to let a conversation continue and when it's time to move things along.

### Co-facilitation

Each person has a different way of facilitating and will resonate better with some members of the workshop than others. Working with a co-facilitator can help to provide a more balanced experience for participants. Having a partner also allows for a shared workload – facilitating is hard work and it helps to be able to pass the baton back and forth. Further, while one person is facilitating, the other person may be able to pay attention to the subtle dynamics in the room (e.g. who is checking out, if people are tired, etc.)

### Preparing yourself for facilitation

Facilitation is demanding work. It requires your full attention and the use of all senses and intellectual capacity. Facilitators are often translating ideas, guiding the direction of the room, keeping the conversation on track, tracking the schedule, managing diverse people, being sensitive to the energy of the group, and synthesizing ideas on the spot, simultaneously. This requires that as a facilitator, you show up ready and capable of doing your best work, in body, mind and spirit. Good rest, healthy food, and a bit of meditation ahead of time are all good starting points.

### Logistics and details

All the best laid plans will go awry without attention to the logistics and details. You and participants will have a much better if the details are take care of in advance.

**Pre-workshop communication + preparation:** Assure that invitees are given plenty of advanced notice and that they have location details, meals (including gathering any dietary restrictions if providing food), start and end times, and any other relevant details in advance of the workshop. Ensure that you have gathered all materials, print outs, and supplemental materials, have managed all food and catering logistics. Make sure to bring your well-developed agenda, and that any presentations are clean, clear and concise.

**Drawing Charts & Recording:** When facilitating a group of up to 15 participants, we suggest that charts are hand-drawn by the facilitator, as shown in each activity description. For larger groups, it may be more effective to use handouts in addition to the flip charts. As you guide your client, group, organization, or team through each activity, record answers on the flip charts for all to see.

**Room set up:** It's important to have the right size venue with adequate wall space for hanging flipcharts and/or butcher paper. If the room set up allows, you can designate a section with flip charts as a "catch all" for ideas that may surface during the workshops. These ideas can then be carried over during the applicable LENSES activity. Long roles of butcher paper can allow for a more interactive experience, using sticky notes as a means for group contributions.

**Materials:** While materials may vary for certain activities, most workshops will require the following:

- Flipchart and/or long sheets of butcher paper - We recommended using a flip chart that is 25 x 30in. or larger. Tear-away flip charts, as opposed to self-sticking, can be easier to manipulate, especially so they don't stick together after being taken off the wall. Flip charts with printed gridlines can be helpful for neatness.
- Markers - have a minimum of 5 different colors available during facilitation such as chisel tip Sharpies, dry erase board markers, and refillable markers.
- Tape - tape can be used to display flip chart pages around the room as well as other helpful documents (e.g. drawings, photos, etc.). White artist tape or painter's tape can double as "white out" and adhesive to attach sheets to walls or each other. Make sure you're using tape that will not damage walls.
- Sticky notes - sticky notes are very helpful for some group activities, especially when moving and grouping content may be helpful.
- Spinning LENSES Frameworks, or printouts of LENSES Framework, and/or individual lenses

If additional materials are needed, they will be listed on the specific activity page.

# documentation and reporting

Most projects will include some level of documentation including the contextual analysis findings, outcomes from the workshops, as well as Work Plans from implementation. Typically a presentation or a document is the best output format for the contextual analysis. All of the activities in the LENSES manual are designed to work as report templates. Content developed in the contextual analysis and workshops is transcribed into digital form, and is often sufficient for documenting the work. CLEAR provides facilitators with a digital copy of the templates for this purpose.

It important to right size your reporting efforts. Some projects ask for a polished report, but more often than not, those reports end up collecting dust on a shelf or in a computer somewhere. On the contrary, if a report is going to be used for storytelling or brining new people along in the process.

## **lenses dashboard**

A LENSES Dashboard is a one-page summary of all work through the Discovery and Workshops phase and may include, Purpose Statement, Essence, Guiding Principles, Commitments and Key Initiatives. If utilizing the Status column under Key Initiatives (see template below), the Dashboard can become a tracking tool and a quick snapshot of how the LENSES project is progressing.

During implementation, the Dashboard should be regularly updated by the LENSES Facilitator, or another team member. Below is a conceptual dashboard that teams could use or modify as the team sees fit.

## **Creating the Dashboard**

1. The initial Dashboard is to be developed by the LENSES Facilitator based on the outcomes of all previous Discovery and Work Planning activities.
2. Fill in and/or modify the electronic Dashboard template based on outcomes from the contextual analysis, workshops and work plans.
3. Review the Dashboard with team members at regular intervals during the Implementation phase.
4. Update as needed.

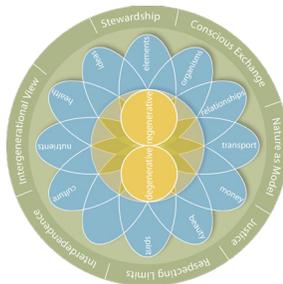
**lenses dashboard:**

Guiding Principles	
Stewardship	
Conscious Exchange	
Nature as Model	
Justice	
Respecting Limits	
Interdependence	
Intergenerational View	
(blank)	
Commitments	

**Purpose Statement**

**Essence**

**PROJECT NAME**  
LENSES  
Dashboard (date)



Initiatives			
Name	Desired Outcomes	Party	Status

# notes

# lenses application and facilitation Q & A

## ***How do I integrate different groups and stakeholders (with differing knowledge and interests) to see the whole (all dimensions of a project) and ensure that their needs are being met?***

- Know your audience and make sure you are speaking to them in their language.
- Work to keep conversations grounded in real experiences, not in theory.
- Have small breakout groups address questions together, giving more time for each person to engage.
- See integrated systems answer below.

## ***What if we don't have time / interest / buy in for a long series of workshops? How can LENSES be useful in a shorter amount of time?***

- Cover ground ahead of time for Pre-Work, turning points, etc.
- Ground the group in basic regenerative thinking using the fulcrum model and abbreviate or eliminate some of the workshop activities.
- Incorporate even small components of the Framework into a project meeting (e.g. the guiding principle activity or one of the Flows Lens activities, and a vitality activity).
- Follow up with a smaller 'workshop' or review meeting with a smaller client group to take them further/deeper. Keep introducing concepts in the regular course of conversation.

## ***How do you incorporate the guiding principles throughout the project?***

- Refer back to the LENSES Dashboard in meetings and ask, "How are we doing here?"
- Two options are to 1) ask people to identify how the guiding principles relate specifically to their project and 2) brainstorm activities that would exemplify or support some or all of the guiding principles.
- Once developed, continue to bring them up in project team meetings. Track these like typical design or project management items.
- Accountability and tracking is key.

## ***How do I create integrated system knowledge within a group?***

- Working on yourself and your own capacity to understand and convey regenerative development is an essential step in being able to lead a group in this way of thinking and being.

- This is a long endeavor, but there are ways to actively cultivate group learning. The goal is to move away from a spoke-and-hub model (where there is one central point of information – likely you) and towards a network of individuals who collectively share the knowledge and understanding.
- Without leadership support, including a willingness or natural tendency to shift toward this type of work, progress will likely be limited. Entrenched and habitual ways of doing business are very real barriers. At times, you may find that you aren't working with a receptive team and it's important to know when to keep trying or to recognize that maybe they aren't receptive.
- If you have willingness or agency within your group, it is about creating regular, frequent, and safe opportunities for people to share with each other. You start to get the flows of communication happening in a lot of different directions simultaneously.
- Create more and more communication opportunities and overlap within the group.
- Check out The Social Networks of Integrative Design white paper, published by Institute for the Built Environment at Colorado State University in 2015 ([www.ibe.colostate.edu](http://www.ibe.colostate.edu)).

### ***Do you share LENSES with your client before engaging a broader group of stakeholders?***

- Yes. It is helpful to focus on broad concepts of regenerative development and Living Environments. Once you get buy in on those concepts, start to introduce the Framework as a means to guide the actualization of these concepts. Once you get buy in on implementing the Framework, then you can explain how it works.

### ***Is it best to establish goals with measurable outcomes?***

- Yes - eventually, you should have measurable outcomes. This could happen in a series of steps: 1. develop guiding principles and/or goals and then 2. develop desired outcomes for each goal. Important to bring the group along in a larger vision, goals, guiding principles, etc. rather than starting with measurable outcomes first. Starting with outcomes first can hurt the overall vision and process, and people focus on tactical outcomes rather than the process.
- Start with the realm of potential and then you can bring that excitement and energy down into the mechanics and specifics.
- The LENSES Rubrics are a good place to gain insights and ideas on measurable outcomes.

### ***How do I generate buy-in and create demand for LENSES and regenerative development services?***

- Use simple terminology when communicating these concepts (e.g. harmful and beneficial instead of degenerative and regenerative).
- Keep in mind that shifting mindsets is hard. Even getting half way with a project compared to where you want to be is a huge accomplishment.

### ***How do I implement regenerative development concepts in a project if I am a participant rather than a facilitator?***

- It is helpful to have a “regenerative development” representative at the project team table. Have one person whose role is to always look through the lens of regeneration, ask questions, and challenge the team. Similar to a green building consultant who is constantly thinking about energy use, they can help assure that regenerative thinking is happening along the way.
- Consider working with LENSES on your own “behind the scenes” if there is not buy-in from the client. Working through the framework terms or relevant activities on your own can keep your perspective fresh and equip you with powerful questions, suggestions, and language during project meetings.

### ***How do I talk about the framework simply and address complexity?***

- Start the conversation with what people care about and then move into explaining the framework as a whole and then each individual lens.
- Start by talking or showing the degenerative-regenerative fulcrum and consider using “harmful and beneficial” in place of “degenerative and regenerative.” It’s a great starting point for conversation. Explain the idea that “less bad” isn’t enough. Most people will agree that being less bad, isn’t enough.
- Remember, people get inspired by the possibility of regenerative development. LENSES can be used as a compass to get to those possibilities when you or the team gets stuck or you all want to probe and discover what’s next.
- LENSES can be as simple as a conversation-starter and build in depth and breadth from there.
- Focus on the benefits of one lens. For example, explain the simple activity of exploring the guiding principles, as a team. Or, explain the activity of looking at the Flows Lens – what’s the past, current, and desired state for each flow?

- LENSES helps to answer the following questions:
  - How can humans become contributors to natural systems?
  - How can we multiply / amplify benefits to the most stakeholders?
  - How will our community benefit from our work?
- A lot of responsibility falls on the facilitator to learn how to communicate what LENSES is with fun and simple language.
  - For example: “LENSES is simple – it is a system for understanding if we are implementing harmful or beneficial decisions”
- Facilitators are encouraged to develop your own 1-3 sentence explanation of the framework.

### ***How do I effectively engage others (i.e. being confident in presenting concepts, and ensuring that participants have a good experience)?***

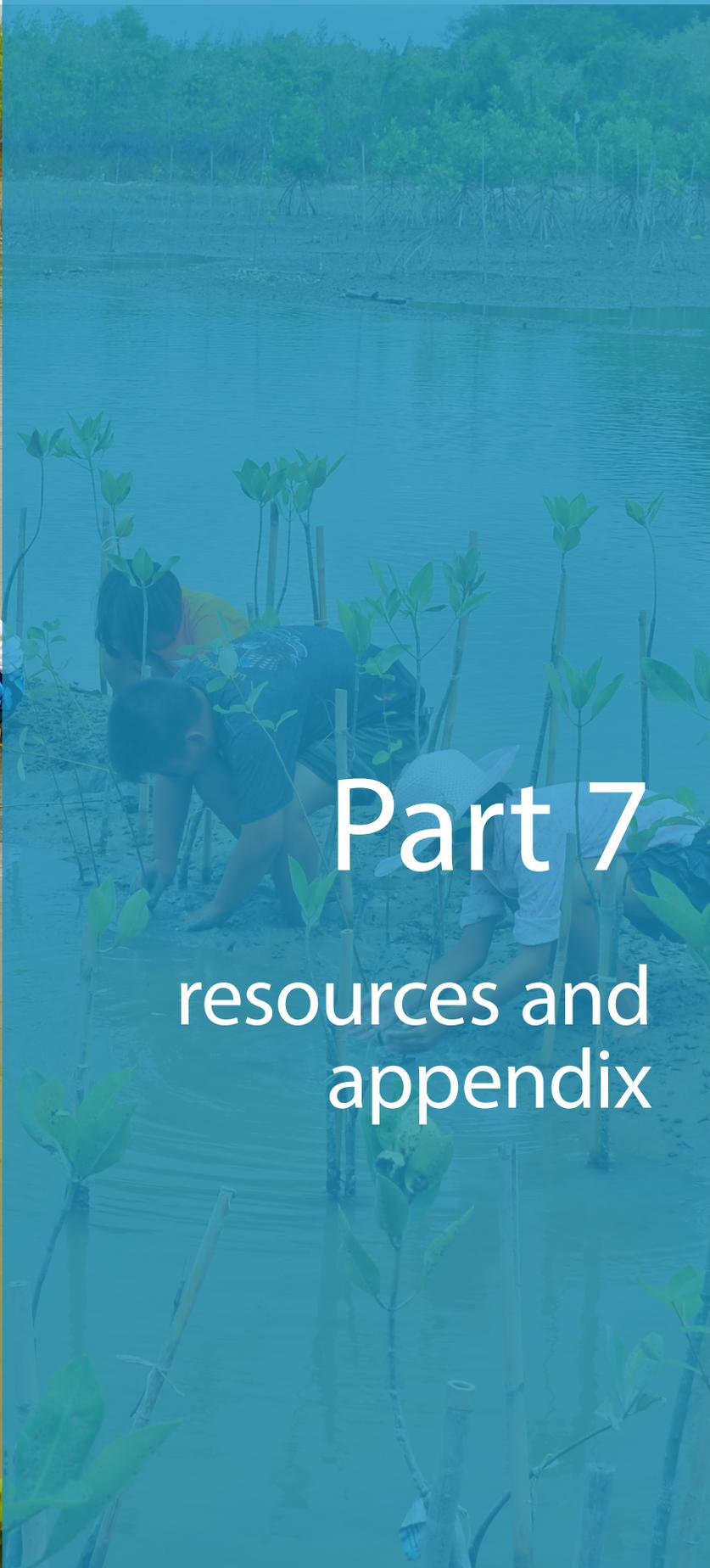
- Being confident in presenting concepts will help others engage.
  - Trust your intuition and observations.
  - Be confident in your leadership skills and messaging.
  - Find your own voice and practice bringing that forward.
  - Embrace personal growth!
- Co-facilitation can be very helpful, particularly for presenting complex ideas.
- Engaging others can start simply with one activity: engage others in talking about guiding principles and values. Use the framework to take the discussion and results to a deeper level.
- Begin with questions and conversations – not too heady at first. It’s about bringing things to light (people’s values, what the existing beneficial components are).
- Ask powerful questions.
- Walk the audience through using the framework from the perspective of an animal or insect (anything other than a human being). It can help simplify the process and get people out of their head. One facilitator practiced this by explaining what it would be like for a bumblebee to use each lens on the framework.
- As a facilitator, it can be helpful to check in with as many key stakeholders as possible to see what makes them tick. Then you can frame the conversation and speak to the audience’s values.

***How do I gain client buy-in (i.e. understanding the potential of LENSES and amount of time needed to practice these concepts)?***

- Explain to clients that everyone will benefit from taking the time to find common ground and be intentional in decision-making. Give people an example of a project that fell short because it was done quickly or in an unintentional manner.
- Explain that taking some extra time can help to realize opportunities, rather than miss them.
- Tap into what is in your own heart and potential – work to inspire people towards that greater potential.
- Explain what the possibilities and greater vision can be. People will often share that vision and develop buy-in.
- Talk about concepts first – don't be too quick to “name” what this process is. Get conceptual buy-in first, then you can mention that there is a Framework to guide this process – but only once you feel your client/audience is ready for that.

# notes





# Part 7

resources and  
appendix



# resources and appendix table of contents

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# introduction to additional exercises

While it is important to work through the LENSES activities outlined in Parts 3, 4, and 5, it is equally important to ensure that users have an enjoyable and generative experience doing so. The following additional activities have been included as a resource to supplement and strengthen the user and facilitator experience during the LENSES process.

As a facilitator, it is helpful to understand how each of these exercises can enhance the LENSES experience. Consider which of these activities will provide a needed mental break, promote connection among participants, or encourage self-awareness and compassion. Look through these when creating agendas and structure the agenda to include intentional breaks and re-energizing exercises. We have included the following types of additional exercises:

- **Awareness + Centering:** help participants become present and focused, gain perspective, connect with their feelings, reflect, and re-center.
- **Listening + Communication:** help participants to practice listening and self-restraint, quickly form a deeper connection with other participants, shed their professional layer, honor team dynamics, and develop a sense of compassion and empathy.
- **Reflection + Closing:** help participants gain a sense of reflection and closure, end the workshop on a positive note, and walk away feeling energized.
- **Systems Thinking:** help participants to see things from a different perspective and discover new leverage points in complex systems.
- **Team Building:** help participants to move from a competitive or oppositional stance to one of cooperation.
- **Visioning:** help participants imagine potential, overcome and avoid potential project “gotchas”, create a shared vision, and unite in a common purpose.

CLEAR did not create all of these exercises; rather, they are a compilation of our favorite activities we have either used in our own workshops or experienced as a participant in other personal or professional gatherings. Whether you incorporate the suggested exercises that follow, or incorporate your own, we highly encourage integrating fun breaks and exercises into your own meetings, workshops, sessions, or gatherings to ensure an enjoyable experience and maintain mental stamina.

As a facilitator, you will begin to gain your own rhythm of leading groups of people through a process. Our hope is that these exercises, or others that you have experienced, become a part of your regular process of facilitation. We would love to hear about other exercises you have successfully used. Please share with us at [info@clearabundance.org](mailto:info@clearabundance.org).

# additional exercise a: shared reading

## Notes

### **Type**

Awareness + Centering

### **Objective**

The purpose of this activity is to gain participants' attention and provide thought-provoking ideas to get everyone's mental capacity warmed up. Upon completing this exercise, participants will feel connected with their emotions.

### **Duration**

10 - 20 minutes

### **Approach**

Share a relevant reading or passage with participants. The facilitator may choose to read the passage aloud, display it on a projector, or share a printed copy of the reading with participants.

### **Debrief**

Ask participants to share their general thoughts on the chosen passage or reading. Alternatively, ask participants how the reading relates to their personal or professional lives and/or their current project.

# additional exercise b:

## silent walk

### Notes

#### **Type**

Awareness + Centering

#### **Objective**

The purpose of this activity is to reflect, meditate, take in energy, connect with one's surroundings, and re-center. Upon completing this exercise, participants will feel rested and rejuvenated, with a quiet mind. Since this activity is intended to simply receive and restore energy (and not release any energy), there is no debrief on this activity.

#### **Duration**

20 - 30 minutes

#### **Timing**

While this activity could occur at any time in the agenda, it has worked well in the middle of a workshop, allowing participants to reflect as well as prepare their mind for the upcoming work.

#### **Approach**

Ask participants to silently walk around the surrounding site. They may choose to walk the entire time or sit in one area, or do a combination of both. Participants should simply observe the elements around them, paying attention to their senses: sight, sound, smell, taste, touch. Encourage participants not to use this time to check emails, make phone calls, or engage in conversation. This is time for them to simply observe, quiet their mind, take in energy, and re-center.

# additional exercise c: i am more like...

## Notes

### Type

Listening + Communication

### Objective

This activity increases the flow of communication and serves as preparation and staging for deeper levels of self-discipline. It is a fun game that makes people laugh and illustrates important truths about communicating (speaking and listening).

### Duration

10 minutes

- 1 minute setup
- 2 minute partner share (1 minute per partner)
- 6 minute large group share
- 1 minute explanation of exercise

### Approach

1. Divide the group into pairs. Ask each pair to decide between them who will be the speaker and who will be the listener.
2. Give the following instructions. "Speakers, your job is to choose one of the following phrase options. I am more like: a) a trombone, b) a ham bone, c) a jawbone. When I say 'go', begin explaining to your listener why it is you are more like a trombone, ham bone, or jawbone. You have one minute. You must keep talking for the entire minute with no dead space. Go." The facilitator times one minute by the clock, then calls "stop."
3. Round two, change roles so that the speakers are now the listeners. "Speaker, your job is to choose one of the following phrases. I am more like: a) a raging river, b) a surging sea, c) a bubbling brook. You have one minute. You must keep talking the entire time. Go." Call "stop" after one minute.

### Debrief

What did it feel like to be a listener? A speaker?

# additional exercise d:

## provocative question

### Notes

#### **Type**

Listening + Communication

#### **Objective**

This activity allows participants to practice deep listening, quickly form a deeper connection with other workshop participants, connect with humanity, and shed their professional layer to some degree. The desired outcome is that participants learn the importance of listening, self-restraint, honoring team dynamics, and develop a sense of compassion and empathy.

#### **Duration**

25 minutes

- 5 minute setup
- 10 minute partner share (5 minutes per partner)
- 7 minute large group share
- 3 minute explanation of exercise

#### **Approach**

1. Ask participants to choose a partner (preferably someone they do not know very well). Write down the guiding questions so that everyone can see it:
  - a. What are you doing in your life that you like?
  - b. What are you doing in your life that you are not proud of?
2. Each partner then takes 5 minutes (this can be adjusted to 2-3 minutes if needed) to verbalize the answer to his or her partner. After 5 minutes, the partners switch roles. The non-verbal partner must actively listen without showing or saying ANY responses – no smiling, nodding, moving the eyebrows, etc.
3. After each partner has exchanged their answers, the facilitator asks the group to share some of their answers. Participants can

randomly say aloud how they or their partner answered the first part of the question: "What are you doing in your life that you like?" Write down the responses on a flip chart for the entire group to see. Then ask the group to share how they or their partner answered the second part of the question: "What are you doing in your life that you are not proud of?" Again, write down the responses on a flip chart.

4. For the last portion of the exercise, the facilitator should explain to the group the purpose of the exercise. Relate the purpose and outcomes of the activity to everyday life and the challenges built environment professionals face when working in a team environment.

# additional exercise e: mindshift

## Notes

### **Type**

Reflection + Closing

### **Objective**

Upon completing this activity, participants will have a sense of reflection and closure about the workshop. This will help to end the workshop on a positive note and participants will walk away feeling energized. It will also spark considerations for participants as they continue to apply LENSES.

### **Duration**

5 minutes

### **Approach**

1. Ask participants to arrange their seating in one large circle.
2. Invite participants to share the greatest aha moment or mindset shift they felt during the workshop, as well as how it will influence how they approach their project (and potentially beyond). Ideally, everyone shares at least one big aha. You may choose to use this guiding question: "Can you share a moment today that shifted how you view or will approach your project? Tell us about it."

# additional exercise f: one powerful word

## Notes

### **Type**

Reflection + Closing

### **Objective**

Upon completing this activity, participants will have a sense of reflection and closure about the workshop. This will help to end the workshop on a positive note and participants will walk away feeling energized.

### **Duration**

5 minutes

### **Approach**

1. Ask participants to arrange their seating in one large circle.
2. Starting with the facilitator, each participant is instructed to share one powerful word about their experience or take-away from the workshop. Consider using the following guiding question: In one word, how would you describe your experience or take-away from today's workshop?
3. Everyone shares one word (either in a clockwise or random order) until all participants have spoken.

# additional exercise g: circles in the air

## Notes

### **Type**

Systems Thinking

### **Objective**

This activity explores the possibility that our viewpoint depends upon where we “sit” and to discover new leverage points in complex systems. It also sets up a context for discussing the concept of underlying “structure.” For example, this activity could be used as an opening or closing exercise to explain to participants that LENSES will help them look at a situation from a different angle, or lens.

### **Duration**

2-10 minutes (depending on debrief)

### **Approach**

1. Ask everyone to pick up a pen or pencil.
2. Have them hold the pen straight up in the air and pretend to draw a circle on the ceiling in a clock-wise direction. Tell them to keep drawing the circle and looking up.
3. Say, “Now slowly continue to draw the circle clockwise, bring the pen down a few inches at a time until it is in front of your face. Continue to circle the pen and slowly bring it down until you are looking down on top of it. Continue to draw the circle while looking down on it.”
4. Ask the group, “What direction is the pen moving?” (It will be counter-clockwise direction at this point. I smile at those who say “clockwise” and encourage them to try again.)  
Note: You will find that some people lose the integrity of the circle as they bring their pens down, swishing their hands back and forth in a straight line. If you notice this, suggest that the person start over and encourage him or her to practice “drawing” a round circle on the ceiling before moving the pen down.

## Debrief

The first question to ask is: “So what happened?” The initial responses tend to range from the insightful to the self-aware and humorous. After people have had a chance to try it again, most of them will see that what changed as they brought the pen down was not the direction of the pen, but their perspective or vantage point. Some valuable questions include:

- What was your initial reaction?
- Do your immediate reactions provide any insight into your own process of forming assumptions?
- Is it possible that changing our vantage point is a way of discovering new leverage points in a complex system? What are some examples of this?
- Donella Meadows (a systems dynamicist, author, and columnist) stated, “How is it that one way of seeing the world becomes so widely shared that institutions, technologies, production systems, buildings, cities become shaped around that way of seeing? How do systems create cultures? How do cultures create systems? In what ways may we be looking at a system through one shared lens?”
- In this exercise, how is it that we may all be looking at a system from a clockwise perspective when we could find ways to look at it from multiple perspectives?

# additional exercise h:

## rock, paper, scissors

### Notes

#### Type

Team Building

#### Objective

This activity illustrates the differences in feelings and behavior that can result by moving from a competitive or oppositional stance to one of cooperation.

#### Duration

20 minutes

#### Approach

1. Have the participants divide into groups of two and play a few rounds of the game "rock, paper, scissors." If you are unfamiliar with the game, you can refer to the following rules:
  - a. Hand signals are used to denote each of the objects (scissors: closed fist with middle and index finger straight; rock: closed fist; paper: hand flat with palm down).
  - b. The following order of strength prevails:
    - i. scissors cut (is stronger than) paper;
    - ii. rock crushes (is stronger than) scissors;
    - iii. paper covers (is stronger than) rock.
  - c. On a given signal, each player simultaneously assumes one of the hand positions and either wins or loses depending on what the other player chooses as his or her position.
2. After a few minutes of this game, explain that you are going to change the rules so that the game becomes cooperative rather than competitive.
3. Ask each pair to try to come up with the same hand signal without communicating in any way about the choice they have made. The pair "wins" when they reach consensus.
4. As soon as they have done this, have them find another pair that

has reached consensus. Have the two pairs see if they can reach consensus by having each pair consult individually about which signal they want to try.

5. When both pairs have managed to give the same signal, have them look for another group (of either one or two pairs) and again try to reach consensus. Each pair should consult about which signal they will use.
6. When there are approximately five groups (of however many pairs), have all the groups try to reach consensus at the same time.

### **Debrief**

Ask participants to reflect on the differences in the way the game felt when it was played in a cooperative rather than a competitive manner.

Ask them to reflect on their experiences in the work place and in team environments with respect to situations which appear competitive but which could become more cooperative with a change in the basic ground rules.

# additional exercise i: project obituary

## Notes

### **Type**

Visioning

### **Objective**

This backward planning exercise helps teams to identify, overcome and avoid potential project “gotchas.” This activity is also helpful for visioning. Facilitator note: The obituary exercise is a bit morbid, and there may be personal instances when it is not appropriate for a team. However, by asking people to consider problems and then how each could be avoided, the team creates a mental image of overcoming likely issues.

### **Duration**

1 hour

- 25 minute group brainstorming (problems)
- 25 minute group brainstorming (solution)
- 10 minute debrief

### **Approach**

1. The project team will write a project obituary. Ask them to imagine the project is nearly over and has failed, and their job for the next 25 minutes is to describe all the things that went wrong contributing to its eventual demise. Often times, people who are difficult to engage in “regular vision” exercises relish the opportunity to list all the things that could go wrong. Perhaps given a slightly pessimistic slant on life, they can generate an exhaustive list of possible--albeit gloomy--outcomes for the project. These might include communication failures that lead to mismatched expectations, vendor delays, or team morale issues...anything that could negatively impact the project.
2. Run the session as you would a brainstorming session with someone in a facilitator role - recording the ailments on a white board (or sticky pad notes) and prompting submitters for more

detail to clarify understanding where required. If you use sticky notes, group related problems under broad categories.

3. Next, ask the group to brainstorm solutions (vaccines) to each of the problems (ailments). Allow 25 minutes for this portion of the exercise. Usually there will be more than one suggested solution for each problem, so make sure you have plenty of white board space (or wall space if using sticky notes). Creating solutions for problems is an energizing process and often generates many creative and unanticipated suggestions.

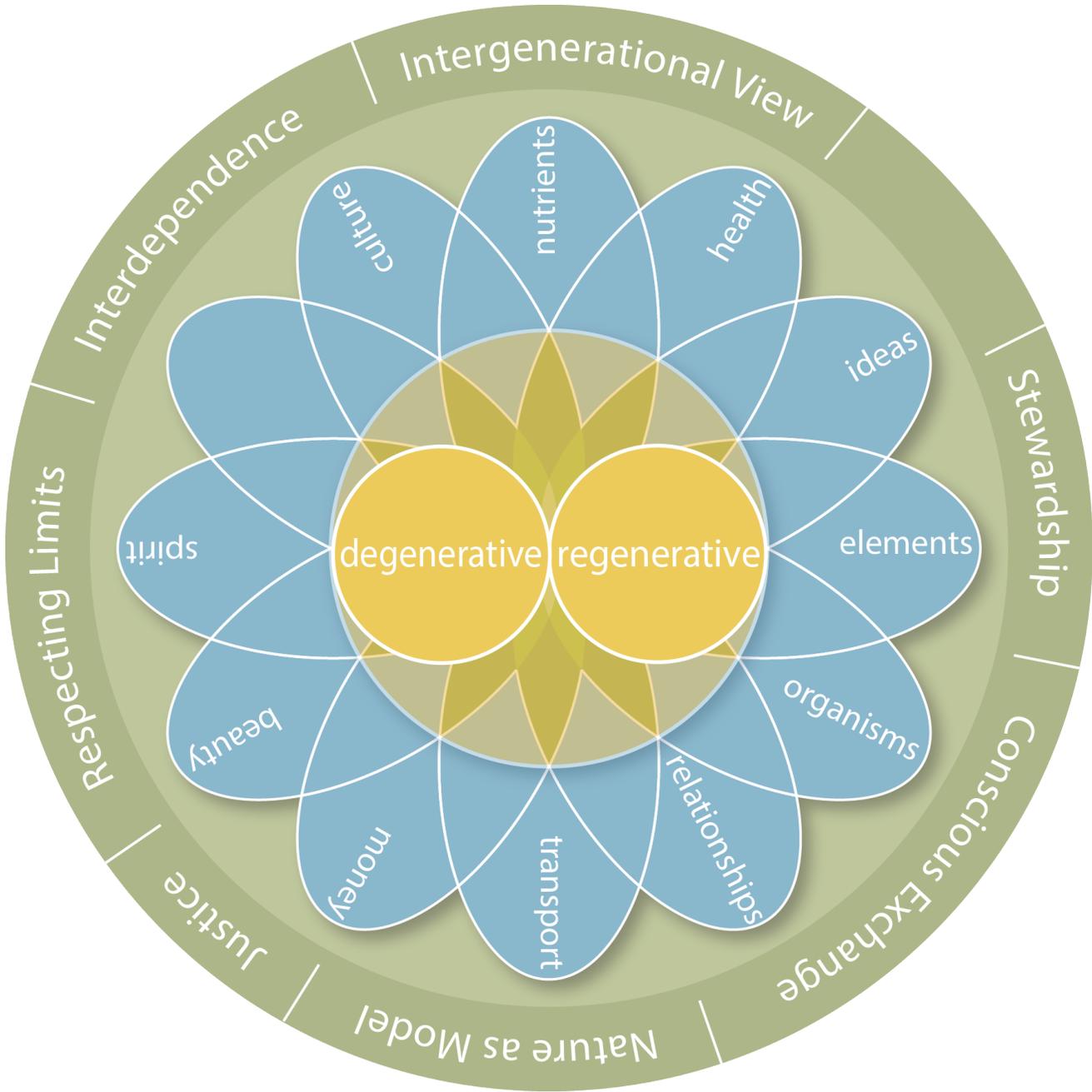
### **Debrief**

This exercise was used in the Toyota Production System. Toyota used the obituary approach when creating their "Toyota University" program and engaged the team in a larger exercise to create a full report entitled "The University of Toyota calls it Quits; A Requiem for a Noble Concept". The report described a corporate university that was everything management didn't want the University of Toyota to be. It worked. The university team clarified the main issue that could be their demise and created a framework for its success in the process.

Debriefing questions:

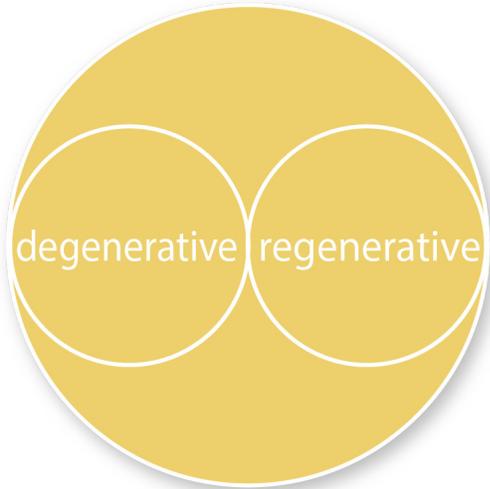
- Ask participants what they think the benefits of backward planning have been as a visioning and systems thinking exercise?
- Has anyone in the group used this methodology before to solve a work-related problem?
- How is this methodology beneficial for their own projects?

# lenses graphic

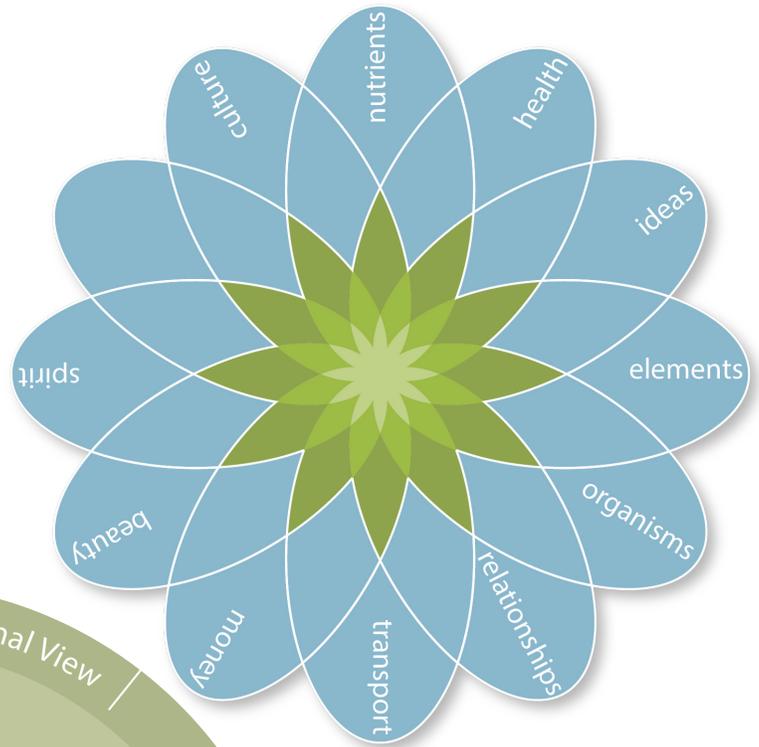


LENSES Framework

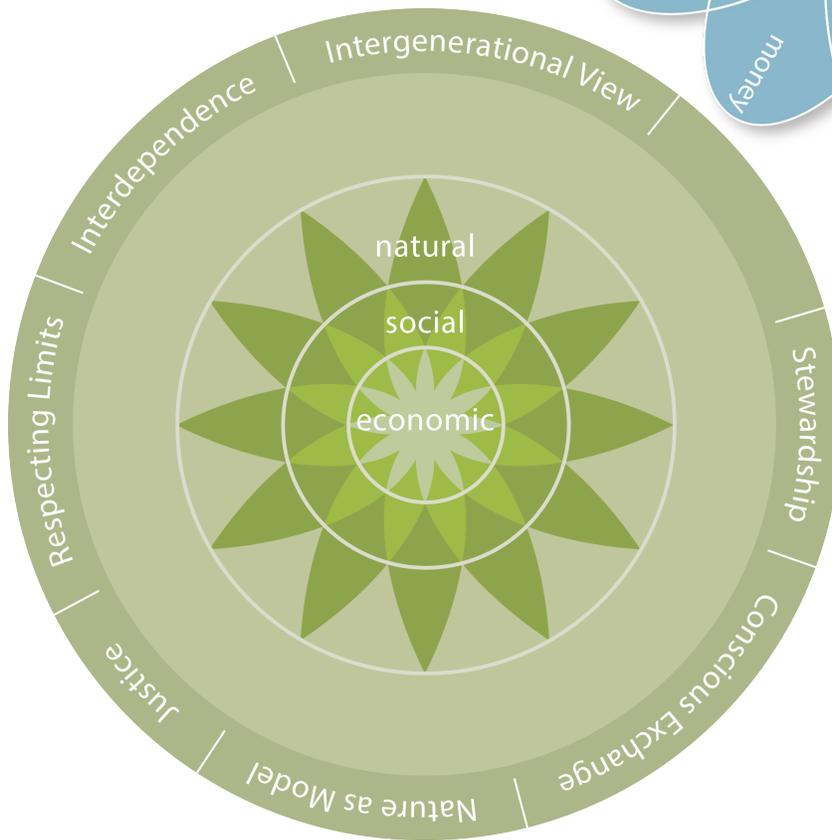
# lenses graphic



Vitality Lens



Flows Lens



Foundation Lens

# glossary

## ***Abundance***

The state or condition of having a copious quantity of something; plentifulness; an ample quantity; relative degree of plentifulness

## ***Beauty***

A term on the Flows Lens; the quality or aggregate of qualities in a person or thing that gives pleasure to the senses or pleurably exalts the mind or spirit

## ***Biomimicry\****

Sometimes called biomimetic design, an emerging design discipline that looks to nature for sustainable design solutions

## ***Conscious Exchange***

A term on the Foundation Lens; a fair and equitable distribution of natural, social, and economic resources

## ***Culture***

A term on the Flows Lens; a set of shared attitudes, values, goals, or practices that characterizes a particular society, group, place, or time; cultural characteristics can include beliefs, customs, art, lifestyles, educational patterns, languages, governmental or power structures, etc.

## ***Degenerate***

Decline or deteriorate; having declined or become less specialized (as in nature, character, structure, or function); having sunk to a condition below that which is normal

## ***Ecological Sustainability\****

A biocentric school of sustainability thinking that, based on ecology and living systems principles, focuses on “the capacity of ecosystems to maintain their essential functions and processes, and retain their biodiversity in full measure over the long term”; contrasts with technological sustainability based on technical and engineering approaches to sustainability

## ***Ecology\****

The interdisciplinary scientific study of the living conditions of organisms in interaction with each other and with the surroundings, organic, as well as inorganic

## ***Ecosystem\****

The interactive system of living things and their nonliving habitat

## ***Facilitator***

One that helps to bring about an outcome (as learning, productivity, or communication) by

providing indirect or unobtrusive assistance, guidance, or supervision

### **Elements**

A term on the Flows Lens; any of the four substances air, water, fire, and earth as well as their subcomponents (energy, light, sound, land, etc.)

### **Flow Lens**

One of the three main components of the LENSES Framework; visually composed of twelve oval sections (containing eleven concepts and a blank, customizable section) radiating from a central point; represents systems thinking in that each of the flows are explored within a specific project, resulting in a deep understanding of a project's unique context over time with a focus on key patterns and relationships

### **Foundation Lens**

One of the three main components of the LENSES Framework; visually composed of a green circle with the guiding principles listed around the circle's edge and the triple bottom line in the middle; designed to engage stakeholders in creating shared understanding and vision through establishing a unique set of guiding principles to guide future decision making within the project

### **Health**

A term on the Flows Lens; the condition or state of a place (e.g., a building, park, city, or business)

### **Ideas**

A term on the Flows Lens; thoughts, conceptions, or notions: opinions, views, or beliefs; can include learning, information, and communication

### **Interdependence**

A term on the Foundation Lens; mutual reliance between two or more things (e.g., between plants and animals; between the economy and social wellbeing; etc.)

### **Intergenerational View**

A term on the Foundation Lens; a particular way of considering something as it relates to, involves, or affects current and subsequent age groups

### **Justice**

A term on the Foundation Lens; the quality of being fair or impartial, including considerations such as social equity; fair and equitable resource distribution; responsible corporate practices; etc.

### ***LENSES (Living Environments in Natural, Social, and Economic Systems)***

A comprehensive framework designed to facilitate the implementation of regenerative development within a project; the framework consists of three main stages: a Pre-Work stage, Workshops stage, and Implementation stage; within each stage is a series of activities to be carried out by the individuals developing the project; this process is strengthened by a visual model that leads users through whole systems thinking

### ***Living Environment***

Settings that are thriving, healthy, and resilient because their ecological, social, and economic systems relate in ways that elevate individual and collective vitality

### ***Living systems thinking\****

A thinking technology, using systemic frameworks and developmental processes, for consciously improving the capacity to apply systems thinking to the evolution of human or social living systems

### ***Locational patterns\****

The patterns that depict the distinctive character and potential of a place and provide a dynamic mapping for designing human structures and systems that align with the living systems of a place

### ***Money***

A term on the Flows Lens; something (such as bills or coins) used as a means to pay for goods and services

### ***Nature as Model***

A term on the Foundation Lens; addresses the need for humans to look to nature for the answer instead of trying to “invent” new solutions and ignoring the “expertise” of Nature; biomimicry

### ***Nutrients***

A term on the Flows Lens; substances that plants, animals, and people need to live and grow; substances that nourish organisms (e.g. soil, “waste”, etc.)

### ***Organisms***

A term on the Flows Lens; forms of life considered as entities; an animal (including human beings), plant, fungus, protistan, or moneran; a system with many parts that depend on each other and work together

### ***Permaculture\****

A contraction of permanent agriculture or permanent culture, permaculture was developed as a system for designing ecological human habitats and food production systems based on the relationships and processes found in natural ecological communities and the relationships and adaptations of indigenous peoples to their ecosystems

### ***Place\****

The unique, multilayered network of ecosystems within a geographic region that results from the complex interactions through time of the natural ecology (climate, mineral, and other deposits, soil, vegetation, water, and wildlife, etc.) and culture (distinctive customs, expressions of values, economic activities, forms of association, ideas for education, traditions, etc.)

### ***Regenerate\****

Restore to a better, higher or more worthy state; renewal or restoration of living systems after injury or as a normal process; to give new life or energy; to reform spiritually or morally; to improve moral condition; to invest with a new and higher spiritual nature

### ***Regenerative Design\****

A system of technologies and strategies based on an understanding of the inner working of ecosystems that generates designs to regenerate rather than deplete underlying life support systems and resources within socio-ecological wholes

### ***Regenerative Development***

The process of cultivating the capacity and capability in people, communities, and other natural systems to renew, evolve, and thrive

### ***Relationships***

A term on the Flows Lens; connections, associations, or involvement; emotional or other connections between people; partnership; collaboration

### ***Respecting Limits***

A term on the Foundation Lens; living within a (natural, social, or economic) system's means (e.g., honoring population constraints, cultural boundaries, etc.)

### ***Restorative Design\****

Sometimes called restorative environmental design, a design system that combines returning polluted, degraded or damaged sites back to a state of acceptable health through human intervention with biophilic designs that reconnect people to nature

### ***Spirit***

A term on the Flows Lens; the inner quality or nature of a person, thing, or place; the feeling, quality, or disposition that characterizes it

### ***Stakeholders***

The individuals and community members whose input and involvement is identified as relevant to a project going through the LENSES process; these are people who have a stake of some kind in a project's execution and its future continued success in its particular location

### ***Stewardship***

A term on the Foundation Lens; careful and responsible management of something entrusted to one's care; an ethic for managing and preserving the integrity of (natural, social, and economic) systems

### ***Sustain***

To maintain or keep from failing; minimize resource use and negative impact to maintain a system over the long-term; do less harm, minimize negative impacts; to provide what is needed for (something or someone) to exist or continue

### ***Systems Thinking***

Thinking through entire systems as opposed to considering each of the components of a project separately and individually; seeing and considering the connections between components as much as seeing and considering the components themselves

### ***Transport***

A term on the Flows Lens; an act, process, or instance by which something may be transferred or conveyed from one place to another

### ***Vitality Lens***

One of the three main components of the LENSES Framework; visually composed of two spheres, one representing Regeneration and one Degeneration; first used to introduce the concept of regenerative development then reintroduced later in the framework as a tool to brainstorm regenerative development goals

\*Derived from "Regenerative Development and Design" by Pamela Mang & Bill Reed, accessed from the Encyclopedia of Sustainability Science and Technology, volume 1.

# notes

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