



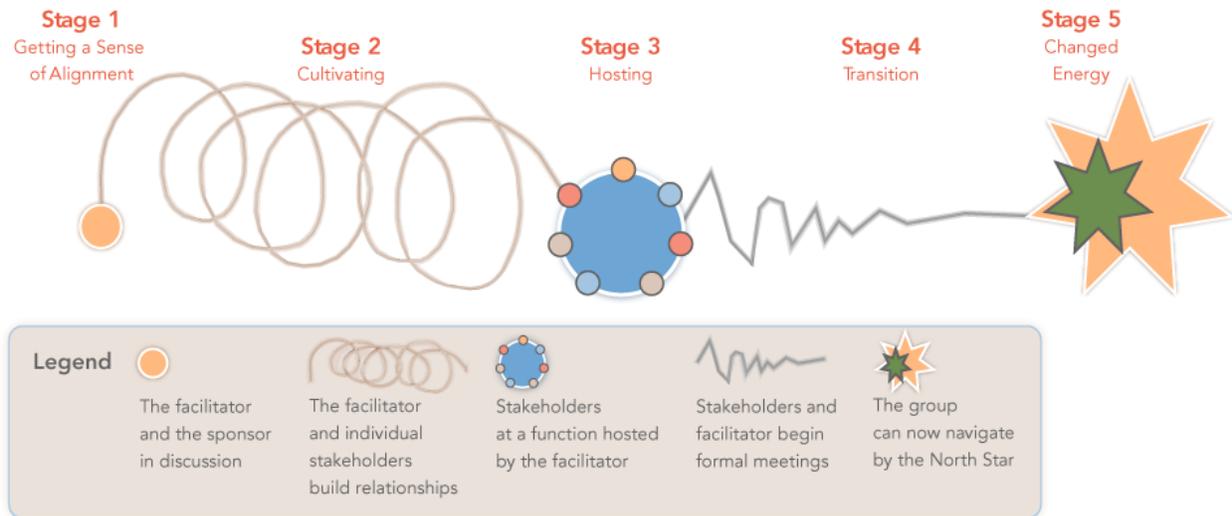
Collaborative Leaders Network

A Collaborative Strategy Grounded in Polynesian Values

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A Collaborative Strategy Grounded in Polynesian Values



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Overview

The overall goal of this strategy is to develop a spirit of collaboration – whether it takes one night, several days, or months.

The collaborative process described here is based on the worldview of its originator, Papalii Dr. Tusi Avegalio. His royal lineage as an *alii* impacts the way he views collaboration and the way participants experience the process under his leadership. Working *malu alii* (“in the shade of the alii”), individuals are guided to a recognition of their interconnectedness and their capacity for collaboration.

Tusi’s approach is rooted in the Polynesian precept that all people are kin, connected through the spiritual energy of *mana*, which can be found in all things. In the human realm, *mana* is expressed by *faaaloalo* (Samoan for “trust and mutual respect”) and *alofa* (“love”). When people exemplify these qualities, they are behaving in ways that produce balance, harmony, and mutual sustainability — the three foundations of a healthy universe and the essence of effective collaboration.



Stage 1: Getting a Sense of Alignment

The facilitator's first goal is to determine whether or not he feels sufficiently aligned with the initiative to accept the engagement.

Overview

The facilitator's primary goal at this point is to determine whether or not he feels ready, willing, and able to accept the engagement. To make this determination, he has to feel that the initiative aligns with his values, his beliefs, and his philosophy.

Tusi also has to sense whether he can obtain the credibility he'll need to play an influential role as a change agent. He wants to know that he will be treated by the sponsor with trust and respect and that he will be granted the independence to utilize his own style and approach. On a more spiritual level, Tusi is assessing whether there is enough potential for *malu alii* to develop.

To get a sense of the sponsor's conduct and character, Tusi first learns about the purpose of the proposed assignment and makes a determination about its significance and essential goodness. Interactions with the sponsor's representative allow him to assess the level of respect, consideration, and commitment that is likely to be forthcoming.

The production of written documents is a function of the sponsor's preference. Tusi does not create a separate document that outlines expectations; for him, an oral agreement suffices.

By the end of this stage, both the facilitator and the sponsor will decide if the alignment is right and whether or not to engage.

I cannot conjure the spirit of collaboration if I am not spiritually connected.



Stage 2: Cultivating

By meeting with key stakeholders one by one, the facilitator begins to build a foundation of mutual trust and respect that will be necessary for working well together in the future.

Overview

Tusi's premise is that the group will not be ready to collaborate until the individuals in it establish mutually trusting and respectful relationships with him. Stakeholders need to have the confidence in Tusi to willingly accede a degree of their own power as he guides the group toward an outcome that they trust will have collective benefit.

Tusi prefers to initiate this stage of the process by contacting people himself and describing the process to them. Creating relationships from the very beginning allows the facilitator to experience individual perspectives first hand, and assess their potential to work well with him and the group. Individuals are encouraged to make the same assessment.

Because socializing is conducive to relationship building, Tusi is likely to express his *faaloalo* through gestures such as picking up the check, standing when someone comes to the table, or offering a ride home. These small acts convey a level of respect and appreciation for the other person and, as important, establish that individual's own capacity for extending *faaloalo* and for *alofa* in return. It is during this stage that Tusi comes to understand each person's starting point for collaboration.

The process of getting a sense of each individual is called *saili matagi* in Samoan, or "gathering of the winds." At the right time, Tusi will issue an invitation to group members to participate in a cultural experience that he is likely to host at his home, which becomes the setting for the next stage.

Unless you are familiar with all the winds, how would you know which way to set your sail?



Stage 3: Hosting

The goal of this stage is to use the experience of being hosted in a Polynesian style to awaken the spirit of collaboration within and between people.

Overview

The goal of this stage is to use the context of a sacred space and the experience of a cultural practice to awaken the connection that exists between people and access their spirit of collaboration. Where Tusi is the host, he sees it as his responsibility to confer as much *faaalalo* as possible on his visitors. The entire family (including children and elders) is part of the occasion; they are knowledgeable about cultural protocols and attuned to the energy flow of their guests.

In the course of the event there are rituals—from greeting and seating, to drinking, eating, entertaining, gift-giving, and self-reflection—that imbue the space and interactions with deep meaning, and enhance the experience of connectedness and relationship among participants. For Tusi, dinner at the host’s home is a preferred setting for navigating this stage, but the venue can be more broadly understood as a sacred place, and the activities can be viewed as a cultural template. Whether in a home or corporate setting, the host works to confer as much respect and dignity as possible on participants through conventions and rituals that are appropriate to the context.

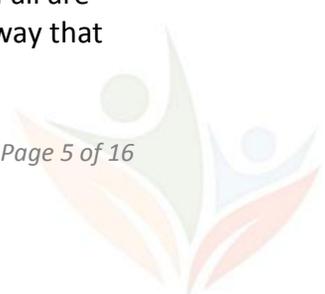
There is great skill involved in the seamless transition from the role of *alii* and host to that of facilitator and navigator.

This stage builds the platform for those attributes that make a good foundation for collaboration, including mutual respect, sharing, and trust.

Stage 3: Cultural Practices

The design of a hosting experience is built on cultural practices that infuse every element with significance. Highlights of the experience include:

- A sacred space.
Hosting in a space that is neutral to the power and political structure (a “place of aloha”) helps to create an environment that is sacred and spiritual.
- A welcoming ceremony.
Multiple generations of family are involved in welcoming guests, including children and elders, who represent purity and wisdom and add to the significance of the greeting.
- Royal treatment.
Every individual is specifically acknowledged from the moment they arrive and all are treated with great deference, as if they were *alii*. Guests are waited on in the way that *alii* are traditionally treated, and with with *vii vii* (exaltation).



- Seating by protocol.
In accordance with tradition, the highest-ranking of the visitors will sit directly opposite the highest ranking of the hosts (namely, Tusi), and subsequent seating locations follow along the same line.
- Sharing of kava.
The spiritual meaning of sharing kava from the same bowl has an origin story. The story is explained before the kava is served to give people a context for the ceremony and encourage them to experience themselves as coming together for collaboration. Guests are invited to make a statement about their purpose in attending, and/or how they feel about their experience.
- Serving of the meal.
Guests are served as if they were nobility.
- Entertainment.
People are more relaxed when they feel happy and entertainment helps to bring about joy. The spirit of collaboration is enhanced when people can laugh together.
- Gift giving.
Each individual receives a personal gift with an explanation of the story behind it. The stories point back to the importance of collaboration and collective effort. The presentations follow the protocol that ranking chiefs use: The giver of the gift sits down in front of the guest and lays the gift at his or her feet. Then the giver gets up and leaves. A second person follows, usually one of the children, with a woven basket of food to take home. Woven mats have the highest material value in Samoa and are imbued with enough power to end war or forgive murder. Special carvings that have traditional and spiritual significance are also high-power gifts in Hawaii. The second-highest-value gift is the unfinished paddle, which symbolizes an unfinished journey.
- A farewell from hosts.
Just as the whole family welcomed its guests, the whole family sends them off with a song. They often sing a song that symbolizes the connection between the USA and the Samoan Islands, which in turn goes back to connectedness.
- A farewell from guests.
Individuals take turns offering farewell remarks; their words describe how they have been affected by the experience. Self reflection is built into the process and can sometimes evoke strong emotions. When that occurs, it is thought to bring blessings to the occasion and power to the process.



Stage 4: Transition

Building on the inclusive spirit that was fostered in the hosting experience, the group meets to define what it seeks to accomplish and how.

Overview

Shortly after the hosting experience, preliminary meetings are held to build on the positive experience and insights that were shared. This is a chance for the group to ground its values, confirm its platform for working together, affirm and possibly revise its goals, set a plan for moving forward, define roles and responsibilities, and confirm logistics and schedule.

As a consequence of the *faaalolo* and *alofa* that were fostered in the hosting experience, the group's attitude toward its goals tends to shift from a focus on individual parts to a focus on the whole. Focus also shifts from one's self to others in a way that does not separate the two.

Through the lens of interconnection, participants are not relinquishing preferences so much as expanding their capacity to share, accommodate, and contribute towards a greater whole. This inclusive perspective translates into a search for solutions that work for everyone.

Now is the time that Tusi mobilizes the energy and attention of the group around clear goals. Documents that will be produced detail the agreements reached, define expectations for further action, and connect the objectives of this initiative to the sponsor's broader goals. Individuals are willing to make tangible commitments of resources and time to follow up on the agreements they have made together.

The time has come to design the canoe and push it into the water.



Stage 5: Changed Energy

Individuals in the group have attained a level of mutuality that enables them to work toward larger goals with an understanding of how these will enrich the entire community.

Overview

The group has been transformed from a collection of individuals driven by their own narrow interests, to a group operating with a shared purpose and spirit of collaboration. Participants are engaged in a continuous cycle of generating ideas and reviewing each other's thinking.

At an early point in this stage, Tusi reaches out to individuals within and beyond the group to solicit more nuanced views of how the proposed plan is perceived, how viable it is, and what can be expected in terms of support or roadblocks. Obtaining reactions from this broader universe of colleagues, sponsors, and technical experts can have positive ramifications for future endeavors.

Within the group, Tusi's effort and commitment is to build group consensus. If there are holdouts as shared ideas emerge, he will make the judgment about whether the concern is central or peripheral to the product and handle the resistance with respect to its value. By the end of the process, everyone in the group has attained a level of mutuality that enables them to work toward larger goals that they understand will enrich the community in the long run.

Once this shift in group culture has occurred, and the benefits of collaboration are self-evident, the group can move rapidly and energetically through the work at hand. It is at this point that the group is expected to take leadership in the design of the process and final product.

By the time foundations have been well-laid— the purpose is shared, the plan is agreed to, the relationships are developed — the facilitator's job is to encourage participants to create their own path, not to tell them what that path should be.



Worldview

Given the diversity of the human experience, it is only natural that people come to the table with different values, assumptions, and beliefs. On the surface, individuals appear to be islands, separate and apart from each other. Accordingly, Western strategies for working with a group of people are often built on the assumption of their separateness and isolation. By reframing the context to look below the surface, individuals lose their singularity and become one with the greater whole; from this perspective, the design and experience of cross-sector collaboration is quite different.

The conventional focus of a collaborative process is tied to deliverables that advance organizational goals and can be arrived at efficiently. Processes that engage the intellect and follow a structure that is efficient and controllable continue to dominate the way collaboration is taught and designed. A far cry from these models of leadership and facilitation is one that sets about addressing the intangible needs of people to be treated with respect, compassion, and kinship.

Borrowing from the ancient practices of traditional Polynesian cultures, the starting point here is conjuring a spirit of collaboration among the stakeholders; this element needs to be in place prior to launching into the group's agenda and before engaging the more tangible goals that drive an organizational process.

Indigenous Polynesian cultures approach group work with a mental template that is organic rather than mechanistic. Farmers and gardeners start the growing process by cultivating; similarly, a collaborative process should start with cultivating relationships. By meeting with key stakeholders one by one, the leader gains a sense of who each person is and begins to build a foundation of mutual trust and respect that will be necessary for working well together in the future. On an energy level, it involves gathering and channeling each person's *mana* and then disbursing that energy so that the group is imbued with *faaaloalo* and *aloha*; only then are participants truly ready to collaborate. When this transformation happens, productive thinking and a sense of wholeness are likely to follow.

According to Samoan beliefs, the highest goal is to be at peace. A person has peace when he is aligned with all four harmonies: with the cosmos, with nature, with fellow man, and with himself. Each harmony is based on a covenant; the covenant between oneself and one's fellow man is based on *faaaloalo* and *alofa*.

Each person has a different capacity to receive and deliver *faaaloalo*. The highest form of *faaaloalo* is unconditional, where someone gives it naturally and willingly. For some people, *faaaloalo* can only be earned through reciprocity; it must first be extended before a person can respond.

If an individual's *faaaloalo* is low, it does not mean that he or she should be excluded from a collaboration; in fact, it may be more important for this person to participate. When this is the

case, efforts are made to extend *faaaloalo* and *alofa* to the person throughout the process. The individual who is the recipient of this trust, respect, and love, has the potential to be transformed by the experience, and become more capable of giving back in return.

At the heart of this collaboration model is the belief that all people have an internal sense of relationship and connection. The process is conceived as a way to help people recognize their sense of kinship with others and with life in general. As the awareness of connection and relationship is awakened in each individual, so is their *feagaiga*, or “covenant with others.” In the course of working with a group that reflects *malu alii*, individuals gain access to their own spirit of collaboration ... which, in reality, has always been there.



Kava Origin Story

One of the kahunas accepted a challenge from a spiritual priest. The son of the priest had gone to a special altar where food was placed for a deity. The son's presence there was a sacrilege. Tagalo Lagi sent down lightning and clove the boy in half, from his head to his legs. The grieving priest beseeched God to take into account that he had faithfully executed his ceremonial duties all his life, and that this was his only son. Tagalo took pity on him, and instructed the priest to fetch a plant that grew near a river, crush its root, mix it with water, pour it into a coconut cup, and spill it along the seam where the boy was cut in two. When he'd done that, the boy came back to life, and the priest was joyous. The act of bringing discordant sides together into one body became the basis for the kava ceremony.



Strategy-Wide Challenges

This style of collaboration may not be taken seriously.

Conventional collaborative processes may consider spiritual dimensions as ‘touchy feely,’ effeminate, or unbecoming of the more masculine models of effective leadership and facilitation.

Deadlines and deliverables create pressure.

This model of collaboration unfolds organically, and it’s a challenge to conform to the pressures of deadlines and deliverables that are typical of more predictable strategies. The greater focus here is on strengthening human relationships and building cohesiveness ... a process whose duration is hard to quantify.

There may be insufficient time to align.

Tensions may linger between individuals within the group if they have not had enough time to align.

People come to the collaboration with different worldviews.

It is not uncommon for sponsors and participants to bring to the collaboration a worldview that perceives people and problems as “Parts that make up the whole,” where the working premise for this type of collaboration is “The whole organizes the part.”

People interpret cultural protocols differently.

Cultural protocols and customs can be viewed as authentic and sincere ... or devalued as touristy, entertaining and curious sideshows.

People perceive status differently.

A fundamental difference in the perception of status can arise in the course of collaborating. Some see status as ascribed (where a person is born into a position); others view status as something that is achieved (this is the concept of the self-made man).



Strategy-Wide Dilemmas

The group can drift from its original goals.

By paying steady attention to the direction in which the discussion is going, the facilitator can help to refocus the group by reminding participants of their goals. There is a certain amount of adjustment that is expected and appropriate after the plan is created. If it seems necessary to re-invent the plan altogether, the facilitator begins by asking the group to reflect on its goals, and consider whether or not they are still valid. If so, the facilitator asks the group to develop a new plan, based on learning what went wrong before. If the goals are no longer perceived to be valid, the group will need help revising its basic direction.

The leader needs to deal with holdouts to group consensus.

As shared ideas emerge, if there are individual holdouts who are not willing to go along, the facilitator will make a judgment about whether the holdout is central or peripheral to the product. If the holdout is central, the group should spend more time on the issue. If the holdout is peripheral, the facilitator may ask the holdout(s) to meet offline at another time. He then works with the holdout(s) to clarify their issue (which is likely to have genuine value) and become better able to clarify these upon returning to the group's central goals. Assisting people to reach clarity away from the meeting allows them to return with a clearer line of thought that can ultimately influence the other members' thinking.

Tough issues need to be dealt with.

When a tough issue surfaces, the facilitator first tries to gain a sense of whether the issue is personal or whether it is related to substance. Personal issues have the potential to intensify over time and can seriously contaminate the process. For that reason, it is important to work with those issues as early as possible in ways that include calling a break and /or spending time on the side with that person (or persons). Rather than calling out an individual during a group session, the facilitator works to accommodate the person's energy and, when the time is right, "move to the side" with that person.

The facilitator needs to recognize his influence on group's decisions.

A facilitator has many opportunities to make process decisions that ultimately shape the content and quality of the group's product. Recognizing this aspect of his authority, it is imperative to make sure the facilitator is in full alignment with the sponsor's goals, and decisions are being made with an eye to delivering the best quality product. The more a facilitator believes in and feels committed to the underlying purpose and goals of the initiative, the less likely he will be to make process decisions based on expediency.

Documentation may not represent the spirit of the group.

Sometimes a person writes a summary document that puts a spin on the group's discussion. This can occur regardless of whether or not a person intended to do so. The best way to mitigate this problem is to make sure documents, once written, are distributed back to group members, who are then expected to review and make comments on what was written. This



step reaches completion when group members vote to accept the document with no further amendments.



Strategy-Wide Tools/Tips

Use small groups

Tusi's preferred mode is to break the room into small groups, enabling multiple conversations to occur. When the small groups are working, Tusi floats around the room, engaging with each one at a time, and acting as a temporary facilitator or consultant to each group's conversation. When the groups report back, Tusi works as a synthesizer, combining whatever was said in the small groups into a whole-group conversation on the topic at hand.

They might be stumbling, but at least they are all stumbling in the same direction.

Give small groups the bigger picture

As Tusi visits the small groups in the midst of their conversations, he makes inferences about how well the whole process is functioning. If he thinks that the group is having trouble, he will collect the concerns and bring them to the group as a whole. Alternatively, he might ask each group to define one or two key concerns and then ask the subgroups to educate one another in the large group.

Draw pictures

Tusi often draws pictures on flip charts — whether to illustrate someone's perspective, add on to what is being said, or offer his own interpretation.

Tell stories

Tusi teaches through stories, since people often understand an idea more quickly when it is framed this way. It's best to tell a story and then add the wisdom to it; this approach has more powerful impact on the listener.

Draw on traditional wisdom

Referencing traditional wisdom not only makes a point that is relevant to the current discussion, but also adds heft to support or reinforce the point.

Use metaphor

Tusi frequently uses metaphor, which levels the playing field between academics and non-academics.

Use humor

When communicating with metaphors or with stories, the more humorous, the more effective. When people laugh their spirit is much more open. Happy people are more productive.

Attend to creature comforts

While connecting with each small group, Tusi checks on their need for food and drink. To make sure their "creature comfort" needs are met, Tusi serves them himself. In this way, the *faaloalo* continues. The experience of being served, and the visual of watching someone



being served, becomes a reminder and reaffirmation of the values that were expressed at the hosting event.

Stay in touch between meetings

During the interim between meetings, Tusi will make an effort to maintain communication with each individual group member. This serves both to preserve the quality of the relationship, and to provide Tusi with updated information on what's working, what's not working, and what's needed.

