Adapting Question Mapping as a Methodology to Help Make Sense of a Community's Collective Wisdom and Shared Futures

by
Erna Gelles and Richard F. Ludeman

Abstract

This paper presents a methodology for making sense of the issues discussed at a west coast nonprofit leadership summit in the economic downturn in the years following 9/11.[1] A real time organizational development tool was employed retrospectively to help frame the fundamental questions raised by the region's leaders about community needs and the sector's role in meeting them. Following a brief description of the Summit, the methodology is presented. The article then considers how this approach differs from other frameworks for encouraging and analyzing discourse as well as how it was adapted post hoc. The technique is both a heuristic device and a guide with potential for synthesizing community issues in real time or retrospectively. The categorization schema provides a framework for deliberative dialogue and action as well as many potential nonprofit research agendas for the coming years.

[1]Particular thanks to Dennis Morrow and Marc Smiley for the conceptual groundwork that resulted in the Leadership Summit and their facilitation at the event, to Alisha Lund-Chaix and Sharon Hasenjaeger for their instrumental and essential work in making it happen and to Oregon Public Radio for recording the fishbowl conversations.

Introduction

In late September 2003 Portland State University's Institute for Nonprofit Management convened a summit of the region's third sector leaders. It was intended to capture ideas around nonprofit issues in a post-9/11 world wherein diminished resources and increasing demands for services were having a profound negative impact on the ability of the region's organizations to accomplish their respective missions. The large numbers in attendance at the Summit reflected a shared sense of urgency among the leaders.

Participants included nonprofit leadership staff and governing board members, as well as self-identified philanthropists, consultants, doctoral candidates and students in the Institute's leadership programs. It was held in a local hotel ballroom where 28 round tables of ten surrounded a raised central platform for fishbowl discussants to engage one another and thus create opportunities for listening and post-fishbowl discussions. After a formal welcome and process introduction, a facilitator invited a diverse group of eight pre-identified community leaders to join him on the central platform, introduce themselves, and engage in a conversation about critical issues facing the nonprofit community. After 50 minutes the facilitator turned the conversation to the tables where 28 trained volunteer facilitators, and as many trained note-takers, guided and captured small group discussions for another 50 minutes. A wrap up in which some of the table participants replaced the original fishbowl to share their table's insights followed but was not transcribed. An afternoon session on a separate topic, with attendee-participants seated at different tables, followed the same format.

At the day's end the Institute's Acting Director promised to summarize and share the collective wisdom from the multiple dialogues. This article explores various Large Group Interaction Methods and contrasts them with the process we used and our substantive findings. The paper concludes with a discussion of the insights and implications the analysis inspired both procedurally and substantively.

Literature Review

In recent years a vast literature has developed on involving citizens, organizations and staff in community or organizational decision-making and change. From the early use of focus groups by the military during World War II (Morgan, 1996; Luntz, 1994) to admonitions against tokenism, manipulation and cooptation when involving citizens in public processes and decision-making (Murphree and others, 1996; Arnstein, 1969) to Thomas's adaptation of a Vroom and Yetton model to guide public administrators about when or when not to involve citizens in decision-making (1989), models and creative methodologies have been sought or adapted, and tested.

Techniques have been developed to engage large groups in public or organizational decision processes, particularly when there is a need for rapid action and buy-in. These include visioning and scenario building such as alternate futures approaches and systems dynamics (see, for example, Trochim and others, 2006; Winch, 1999; Schoemaker, 1995, 1993; Dewar and others, 1993; Schwartz, 1991). Other common processes are consensus conferencing, real time strategic planning, and search and future search conference models. These and other large group conferencing methods are most useful when objectives are clear and little more than basic framing and analysis tools are needed (Bryson and Anderson, 2000; Emery and Purser, 1996). Issue framing or concept selling in organizational decision-making engages participants with an action focus (Dutton and Ashford, 1993), and concept mapping offers additional procedures to synthesize and categorize statements for map development some of which, such as "reverse checking," are similar to those in our analytical procedures (Trochim and others, 2006, 1994; Jackson and Trochim, 2002; Rowe and Frewer, 2000; Bryson and Anderson, 2000). The literature is extensive and it is worth noting that in their recent review of major Large Group Interaction Methods, Bryson and Anderson (2000) address the growing number of new methodologies, stating that "[P]ragmatic participatory and communicative methods are now so widespread that they are considered as constituting elements of 'planning's new paradigm' (quoting Innes, 1995)."

While the Summit borrowed much philosophically from established Large Group Interaction Methods , including a sense of community crisis, the need for "buy in" from a diverse pool of opinion leaders, extensive front-end work including program design and facilitator training, and a shared desire to explore ideas and wisdom among a variety of stakeholders (see Bryson and Anderson, 2000; Weisbrod and Janoff, 1995), post-Summit formal action was *not* an expectation of the Summit, nor was it a marketed goal. We sought instead to create a gathering place that would allow conversations to take place amid a sense of urgency and to encourage, but not stipulate, action.

Question Mapping's Key Concepts and Original Intent

Originally conceived as a real-time organizational development tool, Question Mapping or QM™ (Ludeman, 2003) is grounded in an awareness that most substantive issues involve multiple layers, connections, and stakeholders, and that teams are often overwhelmed by complexity as they struggle to address the key issues effectively. "Seeing wholes" rather than parts, and relationships instead of linear cause-effect chains, are concepts

Question Mapping shares with systems thinking (Senge, 1990). While the tools of systems thinking do not eliminate complexity, they can enable practitioners to articulate connections, gain new insights, and ultimately improve their effectiveness. This spirit guides Question Mapping, a tool for framing issues that seeks to both deepen understanding and provide a blueprint for moving forward when workgroups, teams or communities come together to explore common issues and concerns.

The methodology provides a framework for articulating the central issue of concern to a group and organizes related questions in real-time (team or small group) discussions. It is based on three major premises. First, a lack of clarity regarding the central issue is frequently the root cause of team or organizational ineffectiveness and inefficiency. Second, sustained progress requires that issues be understood from a systems perspective. Third, maintaining a focus on questions is the most effective way to develop a full and shared understanding of an issue, compelling an open-minded, exploratory attitude in lieu of a push to closure that characterizes early action plans, and the methodologies that tend to encourage them.

To illustrate this point, imagine community leaders agree that their primary concern is that local schools have deteriorated. As a statement it rests at the point that initial, and potentially superficial, consensus is reached. Turning it into a question, however, gives it life again. Specifically, there are many ways the central issue could be articulated. For example: What is the relationship between spending and quality? How can we rebuild our schools? What impact does the quality of our schools have on our community?

The dialogue generated in search of agreement about the central issue illuminates important values, motivations, and assumptions behind the initial consensus. The clarity provided by this discourse opens up new possibilities for framing, understanding, and ultimately addressing the issue. Furthermore, all initial formulations of the central question can potentially become a part of the final Question Map and are thus not lost, but add both specificity and a fuller context.

As a tool for capturing and articulating the shared wisdom that emanated from the Summit, the methodology appeared to be amenable to the Institute's promise to sense make. We decided, therefore, to adapt the Question Mapping structure and apply it retroactively as we sought to unravel the full complement of ideas from the transcriptions of the 28 morning and 28 afternoon community conversations.[1]

In essence, Question Mapping provided a structure by which to capture myriad conversations and depict the turbulent space between community needs, nonprofit action and policy formulation. It helped to frame, within the contours of the map, the community's state of 'flux:' where questions abound and the community does not yet have specific answers, but is willing to explore ideas and themes that, when summarized coherently, can serve to guide eventual action.

Question Mapping Process: Real Time Application

In its real-time design, a Question Mapping session leads to a graphical representation of the central issue and key related questions faced by a group. There are four major stages: articulating the central issue, achieving consensus on the central issue, completing the picture, and moving forward.

Stage 1: Articulating the Central Issue The departure point in Question Mapping is a working version of the central issue in the form of a question. For example, "What can nonprofits learn from these difficult times in order to emerge stronger?" Precision is not required at this stage, nor is consensus – just a reasonable formulation of the opportunity or problem.

To begin, each participant writes his or her own version of the central question facing the organization or workgroup on a Post-it™ note. A volunteer places his or her question in the middle of the grid and briefly shares the rationale (See Figure 1).

Participants then take turns placing their questions relative to those already posted and may rearrange any or all notes as they go. The process is both participatory and analytical. During this time the facilitator limits group feedback to seeking clarification. Note that relative to the center square, the top row is intended to capture broader questions, the bottom row to capture the more detailed questions. The left column reflects questions related to background issues, and the right column reflects questions pertaining to future or downstream considerations. It is sometimes useful to label the cells as if the central issue was the center of a compass, i.e., top row is North, bottom left cell is Southwest, etc.

Stage 2: Achieving Consensus on the Central Issue After everyone's version of the central question has been placed on the grid, the session leader facilitates discussion, rearranging or adding new questions to the map as the group deems appropriate.

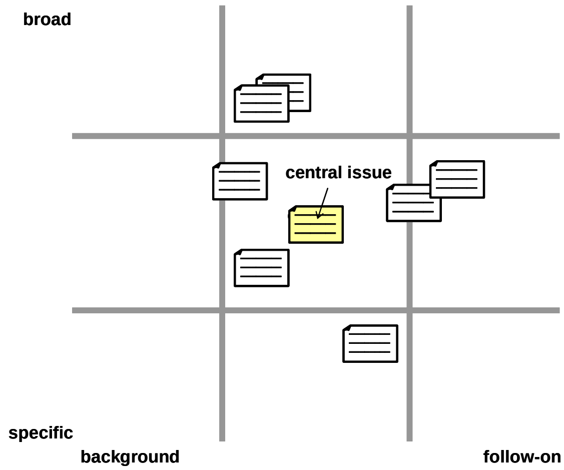
The group continues until it is satisfied it has reached consensus on the central issue. The final version could be one of the original notes, a synthesis of several, or something entirely new. At this point the Question

Mapping grid will also include “left over” versions of the central issue (see Figure 1 for a depiction of Stages 1 and 2). These should be left on the grid, but not in the central position, as they are excellent candidates for the next step.

--Figure 1 about here--

Figure 1:

The Central Issue (Stage 1) and Consensus on it (Stage 2)



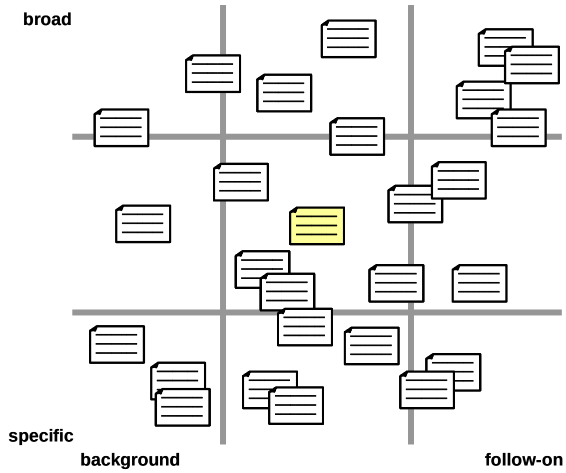
Stage 3*: *Completing the Picture Having agreed upon the central issue, the next task is to complete the map. The process of recording and posting questions is repeated, this time to generate related questions. To prompt additional thoughts the facilitator may ask probing questions. The three major modes of thinking -- critical, systems, and creative – can be used as catalysts.

Critical thinking critiques assumptions and logic, i.e., “Does the conclusion follow from the premises and are the premises true?” It calls for questions that test the quality of thinking: “How do you know?” “Can you explain your thinking?” “From what point of view is this true?” Systems thinking considers the whole and is concerned with linkages, relationships, and patterns. It gives rise to questions that illuminate the context: "Where does this come from?" "What happens next?" "What else is affected?"

Creative thinking, often a logical extension of systems thinking, brings forth fresh perspectives and alternative interpretations. It inspires questions that challenge the status quo: "What could be different?" "What if the opposite were true?" "What if you could start from scratch?" When completed, this stage presents a mosaic of the issues and, when mapped, includes ideas that might once have been easily discarded as isolated fragments of inquiry, but now constitute a whole with the potential to inform future efforts. (see Figure 2).

--Figure 2 about here—

Figure 2: Completing the Picture



Stage 4: Moving Forward The final step in capturing the organizational learning generated by Question Mapping is to revisit the placement decisions, or "fit," both horizontally and vertically**,** and thus the implications of the grid. This allows for a review and final check of the results and sets the stage for moving forward.

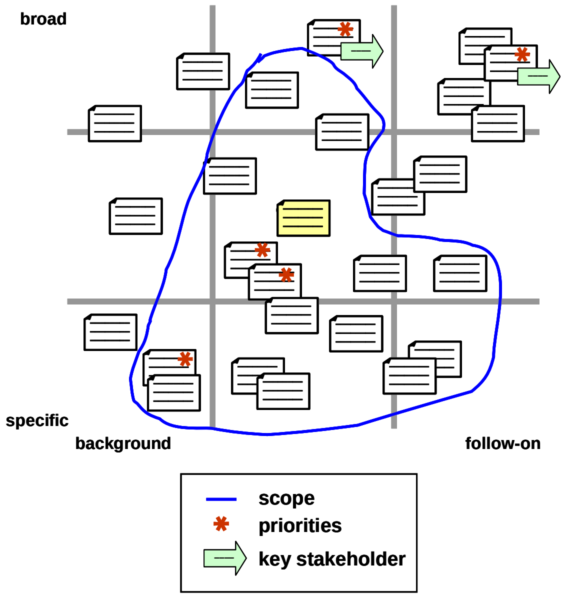
The top row represents the broader picture, either foundational or with a big picture visionary orientation to guide future thinking. The bottom row is more narrowly focused and elaborates research and detailed planning needs. The left column helps identify potential root or background causes as they relate to the central question. The right column is forward looking and provides direction for future plans. Each cell can be interpreted for additional meaning.

Particularly in the nonprofit realm, we can expect that the full dimensions of an opportunity or problem will exceed available resources and transcend organizational boundaries. Therefore, determining priorities and scope are the next steps to transforming this rich body of content into fuel for organizational movement or growth.

Within the constellation of questions identified, a handful will tend to emerge as priorities based on their potential to have an impact or the necessity that they be explored prior to decision-making. The scope or boundary of what the team will take on is defined by those questions they choose to address directly. Note also that it is possible to identify priorities outside the team's scope. These are either key questions that the team seeks or needs to answer, or high leverage questions the team would like to share with other stakeholders. While straightforward in principle, these steps require additional dialogue and discussion before the team can annotate the Question Mapping grid accordingly (see Figure 3).

--Figure 3 about here--

Figure 3: Moving Forward



For an organization, these questions can guide hiring decisions, strategic planning and other issues from the workgroup or team level to the governing board. For the Summit, the questions gleaned from the after the fact analysis of the myriad morning and afternoon conversations represent both fundamental and guiding issues of concern to the community's gathered leaders. The map structures them in a way that can guide academic research and advocacy in ways that may have been less coherently communicated in the past.

The Summit as a case example

The Summit's objective was to entice nonprofit leaders to listen to one another and engage in thoughtful conversation in what promised to be a venue for exploring ideas integral to the community's shared concerns and vision during an era of economic and social distress. The central issues, as perceived by planners, were stated in the program's brochure as *"Philanthropy at the Crossroads: Changing Relationships Between Funders and Organizations"* (for the morning) and *"Facing the Perfect Storm: Just Coping or Real Leadership?"* (for the afternoon).

The process: Following the fishbowl conversation described above, participants continued the conversation at tables where assigned seating was intended to increase the cross-fertilization of ideas. Facilitators guided the conversation with general questions about "What resonated?" "What was missing from or overlooked in the fishbowl discussion?" and "Where might we go from here?"

The structured table conversations were akin to a series of focus groups given that such groups are centrally concerned with understanding attitudes and not changing them (Luntz, 1994), offer opportunities for participants to query one another and clarify their points to one another (Morgan, 1996), and are used to uncover insights and explore information and opinions surrounding ideas or issues (McKenzie and Smeltzer, 2001). By definition not action oriented, focus group methodology is a data collection research method that relies on facilitated group discussions as the source of the data (Morgan, 1996). Thus, while creating opportunities for coalition building for what Bryson and Anderson call "politically feasible change" (2000, p.144), the Summit was not structured to result in action as such, but was orchestrated to stimulate ongoing discourse in an intentional commons where participants could explore widespread organizational and service concerns.

The purpose of this project is three-fold: first, to adapt and evaluate the retrospective utility of the Question Mapping technique in this context; second, to provide the participants and nonprofit community with a valid and useful interpretation of the themes from the Summit, intentionally open to further discourse; and third, to assist members of the academy as they consider research foci, both theoretical and applied.

The Retrospective Question Mapping Process

There were three main stages to the modified process: creating two initial question maps from a sample of the breakout table transcripts (representative of the morning and afternoon sessions); checking our categorizations against one another and reviewing the initial findings with various attendees; then revising the maps based on a comprehensive review of all the table transcripts from the day's two sessions.

Creating maps from transcribed data While the specific implementation of Question Mapping in a post-event context can take a variety of forms, in this case the authors agreed that Ludeman, who had not attended the Summit, should analyze a subset of six transcripts from each session and annotate them for key ideas, concepts and themes, then translate the content into a master list of questions. In some cases the questions were essentially quotations of participants' commentary, although most questions were based on the reviewer's interpretation of the underlying or implied questions. The list of questions was further refined by grouping them into topic areas that included some consolidation as well as reformulation of several questions to better reflect their full implications. This is a process also used in concept mapping (Jackson and Trochim 2002; Trochim and others, 2006, 1994).

We were aware that differences in experience and approaches to transcription among recorders, and interdependence between the two coders (Ludeman and Gelles), could result in validity issues and we addressed this to the fullest extent possible (see Green and others, 1997; and Roberts, 1997, for a discussion of accuracy, readability, and the constructed nature of written talk). All but one recorder had participated in a training session where they were instructed to introduce themselves and describe their role, similar to an unobtrusive recorder in a focus group, seeking to capture main discussion points and important quotes, and asking for clarification if necessary. They were also instructed to assure anonymity in any reports to come from the day's sessions. Some participants also took notes without being asked to and provided them to the formal recorder to be included with their transcripts. These were reviewed for inclusion as well.

Concept mapping provided further guidance and cautions as we mined the data. For example, we were aware that in word-based content analysis researchers need to be attentive to the fact that "researcher-driven classification schemes," and inter-dependence between coders may result in "force-fitting the data" to the conceptual framework or map (Jackson and Trochim, 2002). This can weaken the reliability and the validity of assessments. We addressed this by reconciling differences and validating our judgments at multiple points with Summit attendees. In essence, we were confident that the iterative sense-making at several stages, and built-in challenge component that is an integral part of Question Mapping's conceptual approach, would provide a check on the work of both coders. For example, care was taken not to drop any points recorded from the preliminary sample of table transcripts as long as they "fit" within the list of topical areas. If they did not, a new topical area was added. This explains why the morning session has three areas and the afternoon five areas as distinct framings melded into one central issue for that map (Exhibit 1, middle column). It also suggests that the afternoon session was far broader than the morning session in the discourse it generated.

We used the results of this first sampling stage to refine the initial framing of each session (as described in the Summit brochure) into an articulation of the central issue that became the focus for each of the Question Maps. This is analogous to Steps 1 and 2 in the small group facilitation process discussed earlier, Articulating the Central Issue and Achieving Consensus on the Central Issue.

--Exhibit 1 about here--

Exhibit 1: Comparison of Initial Framing and Central Issue

Session	**Initial Framing – From Six Table Samples**	**Central Issue – Question Map**
A.M. – brochure entitled: *Philanthropy at the Crossroads*	The morning discussion explored the changing role of many foundations and donors in proactively shaping and affecting the work of nonprofit organizations. Initial framing questions included: - Is the new wave of "venture capital" a more strategic approach to philanthropy that defines a stronger partnership between funder and nonprofit leaders? - When does this more direct approach "cross the line" into micro-management and heavy-handed funder direction? - How should nonprofit groups respond to a greater degree of involvement and direction from their funding sources in how to implement their plan?	What role should funders play in shaping an organization and its programs?
P.M. – brochure entitled: *Facing the Perfect Storm*	The afternoon forum explored the impact of federal, state and local funding cuts that have resulted in fiscal crises for our organizations, our clients, and our communities. Initial framing questions included: - What is happening to our community as we struggle? - Is competition replacing collaboration? - What are the implications for our organizations and the communities they serve? - How is the face of the third sector changing under these constraints? - What is *or should* be the role of leadership in this process?	What can nonprofits learn from these difficult times in order to emerge stronger?

Next, the remaining questions were arranged on the Question Mapping grid based on their relationship to the central issue (as in Figures 1 and 2). This, too, was an iterative process that began with an initial placement of all the items that we then reviewed for alignment or fit, both horizontally and vertically. In other words, each row and column of the grid was evaluated and reevaluated or re-checked (Trochim and others, 2006) for internal mapping consistency by each coder individually and then working together. For example, we asked: *Are the items in the top line really higher level issues when compared to the central issue and does the horizontal progression from left (background) to right (future implications) make sense? Are all the items in the left-hand column really background questions with* *respect to the central issue and does the progression from top (higher level) to bottom (more detailed) make sense?* This is analogous to Step 3 in the small group facilitation process. The draft versions of both question maps were then shared with several community members who had attended the Summit, including members of the organizing committee, all of whom deemed the results consistent with their impressions of the Summit.

We structured the analysis to test our own interpretations against one another to determine if, where and how our syntheses fit within the mapping grid. If we were not in agreement, points raised in the transcripts were added to the grid as separate questions (as reflected in Exhibit 1). In contrast, when similar points were raised multiple times they were not added to the grid more than once since weighting is not an aspect of the process. The maps are intended to capture all contributions in summary. Being comprehensive is a goal, but, as with sampling, points can be missed when such an attempt is made. Since the mapping process requires that statements be reformulated as questions, similar points are synthesized and structured as one interrogative. An advantage of this process, as contrasted with other idea harvesting techniques used in Large Group Interaction Methods , is that it recognizes that important points may be made only once, but treats these as comparably important to those mentioned more than once in that they are not dropped from the maps, but are placed on the grid to elicit further discussion. It also allows for nuances that might be missed in a more rapid-paced information gathering session. The end product is a series of questions and, while there is a chance that nuanced points will be missed, the community's review of the maps helps to avoid this. In real time Question Mapping this happens on site. In this retrospective application we enlisted some attendees directly to review the maps and challenge us if they felt substance was missing or misplaced.

Reviewing Initial Findings The initial findings were presented to a meeting of approximately 25 nonprofit leaders most of whom had attended the Summit and gathered that fall to consider an action plan for concerted statewide sector work (a sign up sheet at the Summit established the invitation list for this Institute hosted meeting). Members of this group echoed the positive feedback from organizing committee members.

Revising the Question Maps To validate the initial findings we reviewed all (N=56) table discussion transcripts. Although the central question remained the same, we made a number of edits to the initial question maps based on the inter-coder checking process. While the edits did not significantly change the main themes, we made adjustments to the maps (See Table 1 for a summary of revisions).

Table 1: Revision 1 Edits

(based on inter-coder review)

Items by Map	AM	PM
Initial number of items in the maps	18	14
Items added to original grid	4	8
Final number of items in the maps (initial plus original)	22	22
New placement within the grid based on conversations between coders.	4	2
Items reworded for clarity.	2	2

Findings

The maps for the Summit are presented in Exhibits 2 and 3. A brief examination of the actual outcome for this community gathering best illustrates the nature and potential of Question Mapping. Of specific interest is that there were five issues common to both sessions (indicated by bold, non-italicized entries in the maps). The sentiments reflected in the questions appear to capture participants' frustration with systemic issues in the nonprofit environment along with their desire for more dialogue within the community regarding ways to improve the situation.

- How do changes in government programs, priorities, and spending directly and indirectly affect nonprofit organizations? How can we influence this process?
- What form does competition take in the nonprofit sector? When is it healthy? When is it detrimental?
- When is collaboration productive? When is it counter-productive? How can funders help organizations to determine this?
- How do we map community needs and nonprofits (NPOs) to identify gaps and opportunities as well as facilitate the matching of funders and organizations? Who is in the best position to do this?
- How can nonprofit organizations intelligently evaluate options for working with other organizations?

-- 2 and 3 here --

Exhibit 2: Question Map of Philanthropy at the Crossroads

Broad background ◄	CONTEXT & ALIGNMENT higher-level questions	► Follow on
- *What trends are influencing the funder/organization relationship? Is there a paradigm shift and if so how can we describe it?* - *To what extent are funders strategic and attentive to systemic relationships (e.g., adult literacy is integral to children's literacy)?* - *How do we reconcile long-term impact and short-term funding?*	- *What is the framework that describes the overall funder / organization relationship and how does this aspect fit?* - *What are the elements of this relationship and how do they vary by type of funder? How do they vary by type of organization?*	- *What are the implications of different levels and types of funder involvement?* - **How do we map community needs and NPOs to identify gaps and opportunities as well as facilitate the matching of funders and organizations? Who is in the best position to do this?** - *How do we encourage social entrepreneurship without creating potentially problematic fragmentation?*
- **How do changes in government programs, priorities, and spending directly and indirectly affect NPOs? How can we influence this process?** - **When is collaboration productive? When is it counter-productive? How can funders help organizations to determine this?** - **What form does competition take in the nonprofit sector? When is it healthy? When is it detrimental?**	CENTRAL QUESTION **What role should funders play in shaping an organization and its programs?**	- *How do we get government to acknowledge NPOs' public service work so that they engage us and cushion funding transitions?* - *By what process and criteria should NPOs evaluate and respond to different levels and types of funder involvement?* - *What can we do to increase mutual understanding and satisfaction between funders and organizations?* - **How can NPOs intelligently evaluate options for working with other organizations?**

▲ ROOT CAUSE & CONTEXT
background questions

▲ DIRECTION & PLANS
follow-on questions

- *What does collaboration really mean?* - *How do we develop measures / metrics that are meaningful and practical? Are all outcomes measurable?* - *Does it make sense to tie money to outcome-based projects and not provide administrative support?*	- *What is the range of current approaches / practices? What's working, what's not?* - *What are the opinions / positions of funders and organizations regarding this role? What do they have in common, what are the differences?*	- *When mission, planning, or process is at odds with funder or strings are attached, how can the relationship be preserved, or should it be?* - *How does an organization determine the right mix of funding sources?*

Specific background

RESEARCH & PLANS
more specific questions

Follow on

<u>Notes:</u>

Bold, other than the Central Question = common to AM and PM sessions

Exhibit 3: Question Map of The Perfect Storm

Broad background ◄ CONTEXT & ALIGNMENT higher-level questions ► Follow on

▲ ROOT CAUSE & CONTEXT background questions

▲ DIRECTION & PLANS follow-on questions

- *What are the sources of the discrepancy between the importance of the nonprofit sector and its reputation and influence?*	- *As a sector how do we increase our influence, especially in the realm of policy-making? Are there core issues that would unite people?* - *Where is the leadership? How do ego, passion, and partnership relate to one another in the context of leadership? Where are our visionaries and activists?*	- *How do we move from reactive to proactive? How do we find our collective voice and the means to advocate?* - *How do we develop a systems approach in order to work together on root causes rather than separately on the symptoms?* - *How can we focus on increasing the size of the pie rather than the process of how it's allocated?*
- **How do changes in government programs, priorities, and spending directly and indirectly affect NPOs? How can we influence this process?** - **What does collaboration really mean? When does it work? When is it counter-productive?** What forms can it take? - **What form does competition take in the nonprofit sector? When is it healthy? When is it detrimental?**	CENTRAL QUESTION **What can nonprofits learn from these difficult times in order to emerge stronger?**	- *How can we mitigate the downward spiral created by a troubled economy – higher demand for services and fewer available resources?* - **How do we map community needs and NPOs to find gaps and opportunities as well as facilitate the matching of funders and organizations? Who is in the best position to do this?** - *What can we do to increase understanding, integration, and synergy among the business, government, and nonprofit sectors? What can each sector learn from the others?*

- *To what extent do we need to educate ourselves about the broad community issues – "vision of betterment" for the entire community?* - *To what extent do nonprofit leaders -- executive directors and board members -- need to put more emphasis on their role as community change agents?* - *What is the source of the impression that NPOs do not require administrative costs to do their work? Are board members aware of this funder perception as well as their fiduciary role?*	- **How can NPOs intelligently evaluate options for working with other organizations within and among sectors?** - *Is organizing collectively, e.g., "chamber idea," a good idea and feasible? How would it be funded? How would we find common ground while effectively representing our diversity and passions?*	- *How do we educate the public about our long-standing and instrumental role in serving society, e.g., hospitals and education?* - *Would magnifying the pain of inadequate resources help awaken the general public or alienate them? How do we tap hidden and newly established wealth in the community?* - *How do we engage youth in the sector's critical work, harnessing their passion and vitality?* - *What can we learn from our growing diverse population about how to engage communities in service?* - *How do we turn the Summit's conclusions into action and policy? What is within our direct power to change?*

▼

Specific backgroun d ◄ RESEARCH & PLANS more specific questions ► Follow on

Notes:

Bold, other than the Central Question = common to AM and PM sessions

On several levels discussants appeared to be concerned about the extent to which key players may not be aware of, or give credence to, the systemic relationships that shape the ability of the nonprofit sector to serve society effectively. Funder requirements that organizations provide evidence of collaboration imply an assumption that, absent formal expectations or demands, (a carrot or stick) nonprofits are not likely to engage in partnerships. While this may be so in some cases, the assumption begs further discussion as the questions raised in the maps (both maps, left column) suggest. An alternative view (as captured in both question maps) is that an essential barrier to productive collaboration is the absence of a comprehensive framework to depict community needs versus capacity (a map of the system). Each map represents a mosaic of its own that warrants both reflection and further interpretation; by design Question Mapping invites this ongoing conversation.

Discussion:

Question Mapping as a Tool

Question Mapping proved useful as a framework for making sense of the rich information gathered during the Summit conversations. The results offer a departure point for plans and actions, providing direction and specific topics for future summits, workshops, collective advocacy and research. The results also provide a rich context for partnerships, both applied and theoretical, between the university and the community.

The application brought to light some limitations of Question Mapping in this retrospective context as well. The primary caveat is that the quality of the results is dependent to a large extent upon the skill of the analyst(s). While the process has clear steps and is replicable, it is likely to appear more art than science with the results reflecting a degree of subjective interpretation. This reflects the contextual nature of the process and is worth considering for its implications.

To address issues of subjective interpretation, one response would be to engage multiple analysts or community volunteer-reviewers to create the maps jointly rather than to rely on two analysts working to reconcile their separate interpretations as a check against bias. The maps could also be revisited in real time, with a smaller representative group or substantive area group, to jump-start a conversation and to discuss and corroborate (or not) the maps' findings. The smaller groups could, for example, be made up of board chairs, foundation officers, executive directors of organizations with budgets in a certain range or serving a particular community, nonprofit research or teaching faculty, or doctoral students. Given that community needs, policy actions, and critical questions are moving targets, a revisited conversation or series of conversations could be quite rich.

Alternatively, if validating the instrument at this level is not deemed essential, the maps could simply be used as a jumping off point for follow-up conversations, perhaps taking one of the related questions and making it central to a new community conversation or the subject for a self-selected working group to tackle issues framed by the questions.[2] This could be done with one of the themes common to both maps such as "How do we map community needs and NPOs to identify gaps and opportunities as well as facilitate the matching of funders and organizations?" or one more analytical, but no less important, such as "What are the sources of the discrepancy between the importance of the nonprofit sector and its reputation and influence?" In each of these cases community, practitioner, and/or academic satisfaction with the process of exploring issues the maps identify will be the determinant of value.

"Frequency of mention" data can, if incorporated, add a quantitative element to the picture and highlight particular hot spots or a shared sense of urgency, but must be interpreted with caution. As stated earlier, this information is not a formal component of Question Mapping because it is potentially distracting from the key purpose of the process which is to recognize connections and underlying issues that often are not articulated directly.

Conclusion

Raising important questions and pausing to contemplate their implications instead of pursuing quick action plans requires a commitment of intellectual energy and time, and a tolerance for ambiguity. All of these elements can frustrate those focused on efficient decision processes, illuminating the tension between action and reflection. McSwite (2001) address this tension between deliberative analysis and efficient decision-making in their discussion about reflective practitioners needing to have a tolerance for the "incommensurables" that generate tension and dispose reflective public servants to "a certain degree of hesitancy" leading towards an "experimental attitude toward action." (p. 114) In acknowledging the value of deliberative processes, one of Question Mapping's most valuable attributes is that it marries the benefits of reflection with the need to be responsive in a fast-paced world. As our examples show, the questions on each map are in many cases action-oriented: some identifying that which is unknown but foundational to our understanding, some identifying what we need to know, and some suggesting the need for future-oriented action. Each question has the capacity to guide future action by a work group, a researcher, or a team of knowledgeable players in overlapping roles such as funders and fundees.

Recognizing the critical role questions play in shaping dialogue is of value for both the practitioner and research communities. Although it may be at odds with current efficiency-oriented management practices, we submit that in the long run focusing on the right questions may ultimately be far more effective. Question Mapping provides a means by which to distill the richness of our shared experiences and wisdom into a form that is logical, useful, accessible and iterative. It represents a methodology that can be used in real time or retrospectively to uncover, synthesize, and articulate the underlying issues in community dialogue. And, it offers a starting point as we attempt to make sense of issues that are often too complicated for easy answers, yet too important to defer. Despite its limitations, it offers a structure to organize and make sense of complicated dialogue on which the community can reflect at a later date. For academics and pracademics, the theoretical and applied mining that can be done from the data in the maps has no end.

References

Arnstein, S.R. "A Ladder of Citizen Participation." *Journal of the American Institute of Planners*, July 1969, 35, 216.

Bryson, J.M., and Anderson, S.R. "Applying Large-Group Interaction Methods in the Planning and Implementation of Major Change Efforts." *Public Administration Review*, March/April 2000, *60*(2), 143-162.

Dewar, J, Builder, H., Hix, W., and Levin, M. *Assumption-Based Planning: A Planning Tool for Very Uncertain Times*. USA: Rand Corporation, 1993.

Dutton, J.E. and Ashford, S.J. "Selling Issues to Top Management" *The Academy of Management Review*, 1993, 18, (3), 397- 428.

Emery, M., and Purser, R. E. *The Search Conference: A Powerful Method for Planning Organizational Change and Community Action*. San Francisco: Jossey-Bass, 1996.

Green, J., Franquiz, M., and Dixon, C. "The Myth of the Objective Transcript: Transcribing as a Situated Act." *TESOL Quarterly*, 1997, *31*(Spring)1, 172-176.

Innes, J. "Planning Theory's Emerging Paradigm: Communicative Action and Interactive Practice." *Journal of Planning Education and Research*, 1996, *14* (3), 128 – 35 in Bryson and Anderson.

Jackson, K. M., and Trochim, W. M. K. "Concept Mapping as an Alternative Approach for the Analysis of Open-Ended Survey Responses" *Organizational Research Methods*, 2002, *5*(4), 307-336.

Ludeman, R. F. *Question Mapping.* Portland, Oregon: Carta Nova Consulting, 2003.

Luntz, F. I. "Voices of Victory Part I: Focus Group Research in American Politics." *The Polling Report* , 1994, (May16).

McKenzie, J., and Smeltzer, J. *Planning, Implementing and Evaluating Health Promotion Programs*. Needham Heights, Mass: Allyn & Bacon, 2001.

McSwite, O.C. "Theory Competency for MPA-Educated Practitioners" from "The Reflective Practitioner." Public Administration Review, 2001, *61*(1): 111-115.

Morgan, D. "Focus Groups." *Annual Review of Sociology*, 1996, 22, 129-152.

Mulroy, E. A. "Community as a Factor in Implementing Interorganizational Partnerships: Issues, Constraints, and Adaptations." *Nonprofit Management and Leadership*, 2003, 14(1), 47-66.

Murphree, D. W., Wright, S. A., and Ebaugh, H. R. "Toxic Waste Siting and Community Resistance: How Cooptation of Local Citizen Opposition Failed." *Sociological Perspectives*, 1996, *39*(4), 447 – 463.

Roberts, C. "Transcribing Talk: Issues of Representation." *TESOL Quarterly*, Spring 1997, 31 (1), 167 – 172.

Rosenbloom, D. H., and Kravchuk, R.S. *Public Administration: Understanding Management, Politics and Law in the Public Sector*. (6th ed.) Boston: McGraw-Hill, 2005.

Rowe, G., and Frewer, L. J. "Public Participation Methods: A Framework for Evaluation" *Science, Technology and Human Values*, 2000, *25*(1), 3-29.

Schoemaker, P. "Multiple Scenario Development: Its Conceptual and Behavioral Foundation." *Strategic Management Journal*, 1993, *14*, 193 – 213.

Schoemaker, P. "Scenario Planning: a Tool for Strategic Thinking." *Sloan Management Review*, 1995, *36*(2), 25-40.

Schwartz, P. *The Art of the Long View*. New York: Doubleday/Currency, 1991.

Senge P. *The Fifth Discipline*. New York: Doubleday/Currency, 1990

Thomas, J.C. "Public Involvement in Public Management: Adapting and Testing a Borrowed Theory." *Public Administration Review*, 1990, *50*(4), 435-445.

Trochim, W. M., Cabrera, D. K., Milstein, B., Gallagher, R. S., and Leischow, S.J. "Practical Challenges of Systems Thinking and Modeling in Public Health." *American Journal of Public Health*, March 2006, *96*(3), 538 – 546.

Trochim, W. M. K., Cook, J. A., and Setze, R. J. "Using Concept Mapping to Develop a Conceptual Framework of Staff's Views of a Supported Employment Program for Individuals with Severe Mental Illness" *Journal of Consulting & Clinical Psychology*, 1994, *62*(4), 766-775.

Weisbrod, M., and Janoff, S. Future Search. San Francisco: Berrett-Koehler in Bryson, 1995.

Wholey, J. S. "Assessing the Feasibility and Likely Usefulness of Evaluation." In Wholey, J. S., Hatry, H. P., and Newcomer, K. E. (eds.). *Handbook of Practical Program Evaluation.* San Francisco: Jossey-Bass, 1994.

Winch, G. "*Dynamic Visioning for Dynamic Environments" The Journal of the Operational Research Society*, 1999, 50 (4), System Dynamics for Policy, Strategy and Management Education, 354-361.

Erna Gelles is an Associate Professor of Public Administration in the Hatfield School of Government at Portland State University in Portland Oregon. She is also affiliated with the Institute for Nonprofit Management, a unit of the Hatfield School of Government in the College of Urban and Public Affairs.

Richard F. Ludeman is a management consultant specializing in strategy, communications, and organizational development. He has master degrees in business and adult education and has served as an adjunct faculty member at Portland State University.

ENDNOTES

[1] Ludeman did not attend the Summit, and this technique was never considered to capture the initial table conversations since the Institute was unaware of it. Rather, in the weeks following the Summit Ludeman brought the methodology to the Institute's Acting Director to share its organizational development possibilities. The decision to see if it could be adapted for this after the fact analysis followed several conversations and an exploration of its nuances. Ludeman's assistance was sought once this article's co-author (Gelles) determined it to be of potential analytical value.

[2] Despite our premise that the Summit was not action focused, there was one direct outcome worth mentioning. People signed up at the conclusion of the day if they were interested in being contacted to join a task force to explore establishing a statewide nonprofit association (referred to in the second map as a "nonprofit chamber," reflecting the terminology used that day). Their work has been fruitful and a cyber organization has been launched following a year of task force meetings hosted at the University by the Institute for Nonprofit Management and the College of Urban and Public Affairs.