**EoD Framework Assessment – a Worksheet**

**Name: \_\_\_\_ Date: \_\_\_\_**

**Instructions**:

1. Download this Word document and use it to record all of your responses.
2. Identify the particular challenging situation you are facing—context, internal and external conditions, etc. (See *“Framing the Nature of Your Context”* questions below)
3. In relation to your particularsituation, type in your response to each of the questions below.

**IMPORTANT:** **Complete one full column** such as, all questions on the ‘left column’ **before proceeding** to the ‘right column.’

1. Save your work (as a Word document)
2. We also encourage you to use the debrief questions at the end to reflect on your EoD Assessment experience. If so moved, contact us to review and debrief further. ***Once this assessment is completed, we do offer you a complimentary one-on-one design coaching session using your Assessment responses.*** If you are interested in this offer, please contact us directly to make arrangements:

Jean Singer [singer@whidbey.com](mailto:singer@whidbey.com) Michael Keller [michaelkeller@shaw.ca](mailto:michaelkeller@shaw.ca)

**Holding Capacity:** refers to the inherent mindsets and worldviews held by an individual or a collective that shapes understanding/making meaning of life conditions. It is the capacity to connect thinking with behavior 'to take action' towards integrated learning and to obtain desired results/outcomes.

* The ways to make meaning…values, beliefs, thinking patterns, culture – to interpret experience
* The ways to take in experience through the 5 senses: sight, sound, touch, taste, smell
* The ways that history, the past, influences interpretation and behavior choices; motivation; stress

**Carrying Capacity:** reflects the multiple resources required to carry out, to take action, to meet needs and demands on the system, at whatever scale, from individual to communities and beyond. It is the "scaffolding" to support both the development towards and the sustainability of "adaptive response-abilities". Without a corresponding investment in the appropriate infrastructure most design efforts are doomed to short-term benefits (at best) with inherent long-term, sustainability short falls.

* The existing ‘structures’ that effect operations and interactions; guide and measure performance
* The types of ‘technology’ available to conduct affairs – communication, information and exchanges
* The various ‘resources’ available to support engagement – people, time, energy, finances, agreements

**Designing Capacity:**refers to the concepts, theories, approaches, practices, methodologies and all the interdependent blending of resources appropriate for responding to any given set of conditions. In short, the ‘toolbox’ we draw upon to support the ‘most appropriate’ response to emerging conditions correlated with desired outcomes/results.

* Ability to choose amongst tools, methods, approaches, strategies and to sequence accordingly
* Ability to align self with others and current conditions, culture, appropriateness; evaluate progress/success
* Ability to recognize/discern alternative perspectives and influences affecting choice-making and decision processes as well as learning-how-to-learn from what happens; responsibility and accountability practice

**Framing the Nature of Your Context**

1. What is the nature of the situation you want to explore?

* What is the general context?

1. What are the key presenting conditions?

* Who is involved?
* Who are “the stakeholders”…and what is ‘at stake’ for each of them?
* What is ‘at stake’ in the larger picture/community/world/future?
* What is the issue or the key issues?
* What have you been called to work with and what do you perceive as the issue?
* What is your role?

**Assessing *Holding Capacity***

**Context – Internal System Context – External System**

**(You) (organization/group/community)**

|  |  |
| --- | --- |
| 1. In what ways am I noticing my mindset/beliefs/world views while engaging in this situation?  * What “assumptions” am I making about me, externally about the situation? What enables me to reveal and test them? * In what ways is my past experience influencing how I assess the situation and my role on it?  1. What expertise am I bringing to the situation (knowledge, talents, reflective practice, experience, intuition, and perspective)? 2. How am I describing my role and influence within this situation and the context? | 1. What are the inherent cultural beliefs/values/worldviews *(core essence of the org, team, group, community and culture)* that are in play in this situation?  * What are the collective (org/group/community) assumptions most important in relation to the situation? To what extent are these assumptions getting revealed/tested?  1. In what ways are the cultural beliefs/worldviews/mindsets enabling or inhibiting progress in this situation?  * How are the dynamics of power and influence showing up in the system?  1. What aspects, about the history of this particular context, affect the current situation? |

**Assessing *Carrying Capacity***

**Context – Internal System Context – External System**

**(You) (organization/group/community)**

|  |  |
| --- | --- |
| 1. What am I drawing upon – inside and outside of myself – which enables me to fully engage and respond in this situation?  * How am I supporting myself to meet emerging needs and demands in this situation?  1. What elements and/or structures (norms, time/durations, agreements, information flow, patterns of operation) are assisting me in making progress or getting in the way in this situation? 2. What are some of my individual “skills & abilities” I am using to take productive action? | 1. What are some of the mechanisms, structures or capabilities *(technology, human resources, skills, expertise)* within the system that enables taking effective action and addressing power issues?  * What are some that inhibit taking action?  1. What “tools” is the system using to support itself (and you) in this situation? What is missing? 2. What “demands” (ie power inequity, authority issues, poor communications) within and outside of the system enable or inhibit engaging fully with the situation?  * What are the competing commitments and resource issues? |

**Assessing… *Designing Capacity***

**Context – Internal System Context – External System**

**(You) (organization/group/community)**

|  |  |
| --- | --- |
| 1. What seems most important to me about this situation and my role within it? How am I assessing and evaluating this situation? 2. Am I up for this situation…are my life conditions such that I can fully engage as a designer with this situation (*emotional and physical health, enthusiasm, passion, interest)*? Do I have what it takes for this situation?  * Do I have the skills and expertise? * In terms of my design choices and decision making, what am I drawing upon that allows me to be (in the best of service for this situation) the “best me” in this situation?  1. What are my first thoughts as to what needs to be done in this situation and which approach or method might work best here?  * What criteria am I using to make these assessments? * What’s in my “toolbox” of approaches and methods that I am drawing upon to meet or take action on emerging demands and needs? * What criteria am I using to discern the best “fit” for the situation?  1. As a designer, in what ways am I “trying on” new ideas, strategies/ approaches and drawing upon past experience? | 1. What seems most important to the system about the situation and to fulfill its role?  * What expectations about what needs addressing does the system have about the situation?  1. How does the existing system know what it is ready for? *(What are we designing for?)*  * What criteria are being used to assess readiness in the system for something new or different?  1. What current methods/approaches is the system using to determine the tools and resources available to engage in this situation?  * How are they approaching the prospects and possibilities that an intervention might make possible? * In what ways is the system open/able to “try on” new ideas and strategies, test assumptions and solutions, and learn from experience (success and failures)? |

**Assessing… *this reflective process***

Overall, when you look back over your responses here, what is standing out about:

1. Your own capacities (the left hand column responses)?
2. The system capacities (the right hand column responses)?