

Toward Integral Dialog: Provisional Guidelines for Online Forums

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Abstract: This short article announces the launch of an experiment: *Integral Review* (IR) online discussion forums. It introduces their purpose and discusses the intent of the dialog guidelines that we are developing. The guidelines stem from our desire to explore not only integral theories but integral modes of communication and collaboration. We offer some reflections on the kind of culture we hope the forums create, and the dialogical behaviors, attitudes, and knowledge building characteristics that such a culture might exhibit. We describe our initial attempt at articulating guidelines for integral dialogs, expecting that these will evolve through participant suggestions and through the trial and error process of using them.

Keywords: online forums, integral dialog, Integral Review, knowledge building, culture

Introduction

Starting with this issue of *Integral Review* (IR), we will be experimenting with online forums for discussion about papers and other published pieces and topics in the Journal. We have several kinds of forums in mind, each using a different set of guidelines and processes, reflecting different degrees of structure and rigor (all will use the same discussion forum software). These guidelines are experimental and under development. Thus, as we launch these forums, their dialogs will be shaped by a combination of:

1. The focus of the discussion (e.g., a published work);
2. The makeup of participants (sometimes an invited group, sometimes on open group);
3. The guidelines and structure for that discussion (guidelines are described below; structure includes such things as distinct phases of a dialog, each with a different purpose).

We hope that these dialogs will respond to a need that has been developing over recent years. In our complex world, no single one of us has enough knowledge, exposure, and experience to “go it alone” in meeting challenges we are interested in and venues are needed that allow “collective intelligence” to emerge. Online tools have been touted as offering solutions meeting this need, yet productive knowledge building can be elusive in online environments. We need communicative spaces with more sustainability than list-serves usually provide, with their divergent spurts of activity without closure, summary, or further use. We need spaces where we are more than solitary bloggers and blog-commenters, and where participants have a certain level of commitment to engagement and mutual regard. We need spaces that promote helpful critique and feedback to refine knowledge and that build up understanding and relationship, rather than weakening it with shoot-from-the-hip commentary. Our online dialog experiments will be one small step toward addressing these complex concerns.

IR's motivation to offer these forums—and perhaps people's motivations to participate in them—springs from a range of intriguing questions. Some of these are: What does "integral" look like in *action* (in this case communicative action) as well as in theory? What are some of the defining characteristics of an "integral dialog?" What might integral dialog look like "on the ground" as individuals discuss controversial issues, build knowledge collaboratively, or engage in planning and decision making processes? There are many possible answers and visions. Here we describe our starting point for exploring online dialog about *Integral Review* articles and larger issues of theory and practice as approached from an integral perspective. Our goal is not to characterize integral dialog in a definitive way but to engage in the "action inquiry" of discovering its contours through engaged trial-and-error. We look forward to a collaborative co-evolution of these structures and guidelines, and the culture they may create.

Characteristics of Integral Dialog

What does integral theory imply for the properties of knowledge-building dialog processes? (We could ask the same question about integral decision-making processes, a related subject outside the scope of this short article). To clarify what is meant here, we are *not* talking about dialog that references integral theory. One should be able to evaluate a dialog taking place between, say, urban planners or biologists, who know nothing of integral theories, and ask whether the exchange reflects integral dialog characteristics.

The primary characteristics are that *multiple perspectives* are included and transcended, and that *interior realities* as well as exterior realities are valued. These primary characteristics lead necessarily to others, such as: a tolerance and resilience in the face of uncertainty, contradiction, and ambiguity; the presence of multi-perspectival or dialectical reasoning; and an ethic of mutual recognition and regard that compensates for the social vulnerabilities introduced by multiple perspectives and first/second-person revelations. We expand on these characteristics below.

In a general sense the integral method is an approach that, as Ken Wilber says, "in the presence of apparently incompatible, conflicting, or unrelated data, tries to make a productive, creative synthesis of the divergent elements" with a "gracious, spacious, and compassionate embrace" (Wilber, 2000, p. 49). It is not simply a non-rigorous stance that "everyone is right," but rather an understanding that if there are differing ideas they probably come from different perspectives, and all *perspectives* have validity, rather than that every *idea* is right. The distinction between perspectives and ideas is an invitation to enter more deeply into "where someone is coming from" as we respond to their explicit words. This constitutes using a vision-logic or aperspectival form of imaginative reasoning (Wilber, 2000; Feuerstein/Gebser, 1987). This kind of reasoning is used to not only interpret a particular claim but to holistically contemplate what has been heard from, and of, the other and consider the threads of authentic wisdom that may lie beneath or within the claim. Ideally, this leads not to additional layers of troublesome assumptions about the other, but to a curiosity that fuels more dialog and deepens mutual understanding. To transcend and include is to access a view that can hold the validities of many perspectives, but not *necessarily* offer a synthetic overarching model or narrative (a single view) that encompasses them. To transcend and include can also mean discovery that the complexity of a subject can have multiple layers that call for a complex blend of views or approaches. We might say that it is so rare to encounter dialogs that reveal such things, that this alone may be a worthy reason to be curious: to discover what this would look like by developing it first-hand.

Opening up to multiple perspectives, both from other participants and within one's self, exacerbates "epistemic indeterminacy"—the inherent (or revealed) uncertainties, paradoxes, context-dependence, and dynamic unpredictabilities of knowledge and knowledge creation (Murray, 2006a). A set of cognitive skills is needed to work within epistemic indeterminacy. These skills have gone by various names, including: negative capability (Keats, 2004), dialectical thinking (Basseches, 2005), proprioception of thought (Bohm, 1996), the believing game (Elbow, 2005), reflective judgment (King & Kitchener, 1994), cognitive empathy (Vetlsen, 1994), self-distanciation (Kögler, 1992), strategist action logic (Torbert & Associates, 2004), and the metasytematic order of hierarchical complexity (Commons & Richards, 2003). Together we can refer to these skills as "epistemic sophistication" or "epistemic awareness" (Murray, 2006b). Put simply, epistemic sophistication is about how individuals think and dialog about "I don't know," "I'm absolutely sure," "I disagree" and "prove it!" in productive and respectful ways. These skills are found in many individuals, but the challenge of the day is to discover frameworks, methods and tools that support systematic and community-level development and application of these skills.

Integral theory (Wilber, 2000) and action inquiry (Torbert & Associates, 2004) suggest that dialog should include explicit first-person and second-person perspectives along with third-person perspectives. This means that, along with third-person orientations such as describing objective circumstances, finding empirically validated truths, or identifying statistically probable futures, dialog should include an acknowledgment, clarification, and/or exploration of: (a) the values, goals, feelings, etc. of the author or speaker; (b) the relevant relationships among participants; and (c) the values, intentions, and methods that characterize (or should characterize) the collective process. Second-person perspectives are explicitly sought out via inquiry in dialog. (And see Jordan's [2002] Conflict Awareness Mandala for a more detailed model of first, second, and third person perspectives).

In addition to more traditional forms of explanation, analysis, and synthesis, an integral dialog may contain the following types of statements that are not common in traditional academically styled knowledge building dialogs (they are illustrated in informal vernacular, but could also appear as more academically stylized):

- I really don't know. But my current best guess is...
- I have two seemingly opposing thoughts or impulses going on here, which are...
- I was wrong about that. Thanks to your comment I checked it out and ...
- The author is a long time friend and colleague of mine, which may bias my opinion.
- You said that you would address my three questions but as far as I can tell, you missed the third. Would you address that one also?
- I felt some frustration and anger upon reading your comment. Let me try to explain...
- Let me see if I am interpreting your position correctly... Do I understand it the way that you mean it?
- Are you making this assumption...?
- Would you be willing to tell me what you think I am saying, as you understand it?
- Both perspectives seem valid to me, and each is valid in a different way, as follows....
- What is our purpose here? Is our process aligned with it?
- I think it is going to be important for us to... because ...
- Would some of you like to start a separate discussion thread about how we can make this dialog more productive?

Our guidelines encourage trust and allow for a certain level of vulnerability that we hope will allow participants avoid the polarizing and pontificating styles found in many online venues. We encourage revealing layers of the self and the exploration of topics and questions rife with uncertainty, paradox, and ambiguity. In addition to behaviors that state what is known and advocate for what is wanted, we hope to support behaviors that help participants collaboratively unpack, examine, re-form, and create knowledge (along the lines of "letting be, letting go, and letting come," as suggested by Otto Scharmer, 2006).

This is not an invitation to be slipshod or narcissistic. Our aim is to develop guidelines that will support rigor, clarity, and efficient knowledge creation. Authenticity and transparency can add critical information to knowledge building. If it is done well, it can increase communicative efficiency over the long run. The magic of collective intentionality will manifest to the extent that participants find the subtle balance between rigor and care, challenge and support (or, from Murray, 2006c, integrity and perspective-taking).

Revealing and discussing the topics of interest and concern within and among individuals (i.e., the subjective and intersubjective), and posing ideas in areas of uncertainty, opens one up to social vulnerabilities. These vulnerabilities must be compensated for by the level of trust, integrity, and reciprocity in the dialog space. There are two implications of this trust/vulnerability dialectic: (a) we acknowledge that each individual needs to decide what feels appropriate and safe to communicate, and when to apply any of the guidelines; and (b) the more that participants apply the guidelines (perhaps "courageously"), the more safety, trust, and integrity is created in the dialog space. The level of reciprocity attained, and the degree to which participants own their biases, feelings, cognitive filters, etc., will depend in part on developmental elements of each individual and in part on evolving culture of the group (Ross, 2005).

Thus, the best ways to contribute to the upward evolution of a dialog (and the knowledge it can build) are to: (a) model the Guidelines, (b) gently offer feedback to others to help them understand and apply the guidelines, (c) avoid condemning others who do not follow the guidelines as you interpret them, and (d) help us and the group improve the guidelines. Our hypothesis is that if a group self-selects through a belief that these guidelines are valuable, and if participants agree to make a good faith effort to work within the spirit (not the letter) of the guidelines, then subsequent dialog will benefit.

Parts of Speech

These purposes are advanced through certain types of dialog patterns, or parts of speech (Ross, 2006; Torbert & Associates, 2004). Ideally, they include the following (examples of these appear in the example statements above):

- *Advocating* for a position, perspective, action, etc. (includes first-person feelings, thoughts, concerns, etc.).
- *Illustrating* the worth of whatever is advocated for, using examples (hypothetical or real) to show why the proposal is sensible (includes third-person comparisons, "objective" information, reasonable speculation with reasons given, etc.).
- *Framing*, or *re-framing*, statements in first-person terms to own and claim one's intentions, hopes, etc.

- *Inquiring* into others reactions to what one has said, or inquiring more deeply about what they have said (invites second-person, intersubjective knowledge sharing).

The first two are encountered more often than the last two. The full range of variety—which engages all three “persons” required in integral dialog—is what we hope to encourage. Thus, our guidelines explicitly support the following modes of interaction and inquiry (explained in the next section): self-reflexivity, using affect (i.e., emotional experience) as feedback, authenticity/sincerity/transparency, multi-self perspectives, we-reflexivity, ideal role taking, contradictory perspectives, synthesis/transcending and including/metasystematic perspectives, balancing critique with appreciation and inquiry, and methodology reflection.

Open Forum Guidelines and Integral Dialog Guidelines

Our Guidelines are in two parts. First are *Open Forum Guidelines*, which are basic rules of the road for participants in all *Integral Review* online forums. Second are *Integral Dialog Guidelines* which more deeply support breadth, depth, and integration in knowledge building. We expect to host at least two types of dialogs: dialogs open to anyone, and more structured dialogs with limits on participation. All dialogs would be expected to use the Open Forum Guidelines, and structured or invited dialogs would be asked to also use the Integral Dialog Guidelines (or some variation on them tailored for the situation). One type of structured dialog involves inviting a small number of respected individuals to respond to a paper and dialog with the author (perhaps followed by an open dialog after the official closing of the structured dialog). Another type of structured dialog is to collect a small group of people who agree to more stringent rules of engagement, perhaps responding to a series of prepared questions or engaging in a sequence of divergent and convergent dialog phases.

How can you participate? With each *Integral Review* issue, and occasionally between issues, we will announce which articles (or topics) will have associated dialogs and will describe the guidelines for each dialog. Open dialogs may begin immediately, and anyone can post in their forums. Structured dialogs will usually have limited participation, will begin after leaving enough time for participants to read the article (usually several weeks), and will end after a pre-determined duration (usually 3-6 weeks). Some structured dialogs will have invited participants already chosen at the time of publication. For other structured dialogs we will ask readers to submit requests to participate (along with a little information about themselves) and will create one or more size-limited groups from the set of interested readers. A minimum requirement for non-invited participation is to be a member of the *Integral Review* e-mail announcements list (sign up on <http://integral-review.org>).

The *Open Forum Guidelines* are straightforward, and are included in the Appendix. Below we describe the *Integral Dialog Guidelines* in two parts. First are concrete "structure and form" suggestions. Second are "attitudes and perspectives" that are meant to set the tone of the dialogs, invite certain types of exchanges, and serve as a reference for meta-dialog aimed to self-correct dialog in process.

Integral Dialog Guidelines-1: Structure and Form of Posts

Label paragraphs: (sequentially through the article/post, e.g., "1, 2, 3"; or hierarchically showing sections; e.g., "3.1.5"). This will help others refer to specific claims or ideas.

Use dialog labels: When useful, we suggest labeling statements or paragraphs with labels such as the ones suggested below, in CAPital letters in front of your statements or paragraphs:

"FACT:" (or "INFO:"), "OPINION:" (or "HYPOTHESIS:"), "QUESTION:" (or "REQUEST") (to balance advocacy with inquiry and curiosity)

Other possible labels include: SUGGESTION (for how to proceed with dialog or other actions), APPRECIATION (to balance critique with acknowledgement), PROCESS (to discuss the process or tone of the dialog), ASSUMPTION (to identify your underlying beliefs or values), CHAT (to identify tangential posts such as "I second that idea" and "glad to see you here on this forum").

See the guidelines below for more ideas on models for labeling.

Integral Dialog Guidelines-2: Attitudes and Perspectives

Self-Reflexivity (and metacognition). Critically examine one's own values, assumptions, biases, and interests. Reflect on biases that may arise from culture, gender, power-dynamics, etc. (As appropriate, be transparent about these, see transparency below.)

Affect as feedback. Strong reactions, favorable or critical, to another's idea or style are invitations to look inward (with what David Bohm would call "proprioception of thought") and be alert to bias, projection, black-and-white thinking, and other contractions of thought. This is not to advise against vigorous language or strong claims, but a reminder that emotional states may contain important information about conscious or unconscious needs, values, or goals. Discovering the psycho-logic of our projected emotions can lead to self-knowledge-building. We do not suggest that it is always productive to communicate to others what one discovers in such introspection, but propose that it is worth paying attention to.

Authenticity/sincerity/transparency. Make a sincere effort to make known all information that could be relevant to the particular problem under consideration. This might include:

- One's true intentions, interests, needs, feelings, and desires.
- Relationship to the topic (experiences and level of expertise).
- Relationship to the author or participant one is commenting on.

Multi-self perspectives. Individuals are not usually "of one voice." One can explore contradictory internal beliefs; take up opposite sides of an issue; speak from multiple inner voices (e.g., the voice of compassion, the inner defender, the skeptic, the vulnerable child, the voice of higher awareness, etc. See Voice Dialog, and Big Mind Process at www.bigmind.org). One can speak from one's levels of needs/values from the Spiral Dynamics model, e.g., the purple, red, blue, orange, green, and yellow perspectives that arise within one. One can speak from the perspective of one's role, e.g., "in my leadership role as project manager I think... but as a parent of teens I think...and as your friend I think..."

We-reflexivity (and meta-dialog). It may be important to reflect on group relationships and process, to make "points of order," reflect on the quality of the dialog, or discuss the usefulness or meaning of these guidelines.

Ideal role taking. Attempt to understand the argument from the other's perspective. This usually requires a commitment to iterations of dialogue and learning. Making direct inquiries is

recommendable, and spares guessing at another's position. Usually, people welcome opportunities to explain what they mean. This process may require putting one's world view and cherished ideas aside (suspending) to try to enter into the world of the other (or open to a larger space of possibility). This hypothetical role taking can be of participants, or of various stakeholder groups.

Contradictory perspectives. Allow for paradox, ambiguity, and contradictory ideas, and attempt to look for and articulate the questions underneath.

Synthesizing/transcending and including/metasytematic perspectives. Is there a perspective from which the perspectives or "truths" on the table are all true in their own way? Does the complexity of the subject matter indicate that each may be appropriate or necessary in certain contexts (i.e., one size does not fit all)? Have all valid concerns been integrated into a conclusion (i.e., is the conclusion nuanced enough to be adequate)? What are the strengths, weaknesses, and differences among the various paradigms, theories, or worldviews converging in the conversation?

Balance critique with appreciation and inquiry. The cultivation of openness, contemplative "letting go, letting be, and letting come" can, without losing rigor, allow critique to turn into curiosity. Dialog can build upon the strengths in another's position as well as capitalize on the weaknesses in another's position.

Methodology reflection. There is no single or fixed set of criteria for evaluating claims or assertions. People judge the validity of each other's claims differently for different situations. (See methodological pluralism [Wilber, 2006], metaphorical pluralism [Lakoff & Johnson, 1999], and epistemic indeterminacy [Murray, 2006a].) The point is to try to differentiate and be explicit about how we make these judgments (i.e., distinguish various truth/validity/meaning-generating methodologies or criteria). There are many possible frameworks for these differentiations, including:

- Various truth-validating criteria, including: correspondence with objective reality; coherence with other things that are believed; the consensus of experts or group members; practical utility; the authority, legitimacy, or reliability of antecedent information sources. etc.
- From Habermas' validity claims framework: Is your critique about another's claim about its: comprehensibility, truth, moral or normative rightness/appropriateness, or the sincerity/honesty of the author?
- Wilber's information sources of "eye of matter, eye of mind, or eye of spirit;" or his 8 primordial perspectives and methodologies (including phenomenology, hermeneutics, structuralism, and empiricism).

Note that these guidelines are meant to be applied alongside (or over and above) more standard knowledge building values. We do not discuss them here, but precision, rigor, clarity, efficiency, accuracy, logic, and objectivity remain important to productive textual dialog. These more traditional values can be at odds with those implied above (and at odds with each other) and finding a combination parsimonious to each context is a matter of art and wisdom. (In Spiral Dynamics parlance one could say that we are supporting second tier methods of knowledge building, which must by definition transcend *and include* first tier methods.)

Conclusion

In the *Integral Review* forums, we assume that dialog has three primary purposes:

1. *Knowledge building*, i.e., the collective attempt to discover or create ever more adequate knowledge.
2. *Building social capital*, i.e., the community building and networking that occurs as people interact, get to know each other and accomplish something together.
3. *Deepening spiritual or transformational capital*, i.e., in the ways that one grows and develops from interactions with others with different perspectives than one's own, engaging in self-reflection and adaptation.

Online collaborative tools can support both the external behaviors and the internal skills that are needed for integral knowledge building, social capital building, and personal transformation (Murray, 2006c). Such tools and their associated protocols are not guaranteed to benefit every individual, but across a group of individuals a system of small interventions should create a noticeable change on average and over time.

There is a dialectic or reciprocal relationship between human technological artifacts and human development (see Collins, Shukla, & Redmiles, 2000; Vygotsky, 1978); indeed, in all of our human activity (Ross, 2005). The technologies that we create, and the activities we undertake, alter the environment that we operate within and end up creating us as much as we create them. This dialectic occurs mostly inadvertently (we create technologies and undertake activities to solve problems and meet needs, not to change ourselves) but it need not be unconscious. Digital technologies afford unique opportunities to consciously tailor the medium/environment of communication to support evolutionary processes. When imposed hierarchically such tailoring can seem like social engineering, but when created collaboratively it can be empowering and transformative. This is the “opportunity space” we hope to open up with *Integral Review* dialog forums.

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Appendix—Open Forum Guidelines

1. *Use real identities.* All participants are asked to use their real names, no anonymous posts or pseudonyms, please. Include contact information (email and/or home page) in posts.

2. *Be respectful.* Maintain a safe container for the expression of views and the emergence of creative collaboration.

- No attacks or threats. Avoid rumors. Respect those with differing views.
- Respond respectfully to suggestions from designated online facilitators/moderators.

3. *Stay on topic.* Help the forum stay focused and easy to follow.

- No advertising.
- Keep to the focus of the forum in general and the topic specifically.
- (Brief mention or links to of-topic items allowed in the context of on-topic conversations).
- Try to be brief and to the point--or at least *include a summary* of your points at the top of your post.

4. *Cite sources* for facts, e.g., reference books, newspapers, web sites, etc.

5. *Be curious, creative, and open to change.*

- Seek to understand other peoples' perspectives, visions, and needs. Focus on underlying needs rather than specific strategies.
- Be open to the possibility that the experiences of others may transform your opinion.
- Creatively explore strategies that meet as many needs as possible.
- Don't just critique, offer positive alternatives.

6. *Notice, question, and clarify assumptions.* Reflect on possible biases you may have. Help others clarify theirs.

7. Differentiate *facts/information* from *opinions/ideas/values/needs*. Diverse opinions, ideas, and needs are natural and encouraged, but try to identify "facts" that all can agree upon.