

Collective Wisdom Index Alpha

Introduction

Where is wisdom coming alive? How can we best assess the level of wisdom of an individual, a group, an organization, an institution, a nation, or the world? Developing a reliable *wisdom index* can provide visibility into where wisdom is thriving and where it is lacking—based on objective criteria and measures. Various Individuals or groups striving to increase their wisdom can use the index to assess their current status, identify specific areas for improvement, and measure progress along the journey toward wisdom.

A family of indices is being developed to assess the various manifestations of wisdom we encounter and aspire to. A variety of indices is required because wisdom is difficult to define, observe, characterize, assess, and measure. Some collection of indices may eventually make it possible to measure a useful WQ – a *Wisdom Quotient* for individuals and groups. This particular index is the first in the series developed for assessing *collective wisdom*—the wisdom that emerges and the outcomes that result when a group of individuals gather for some purpose.

When skillfully used, this assessment instrument can:

- Accurately reflect a well-conceived definition of wisdom,
- Rely on observations, data, and measurements that can be reliably obtained,
- Be easy to use,
- Provide valid, reliable, and repeatable results,
- Provide results that are easy to interpret,
- Be perceived as providing an accurate assessment of wisdom,
- Provide a wisdom model that encourages learning how to increase wisdom,
- Identify specific areas for improvement so that the assessed organization can use the assessment results to guide their improvement efforts, and

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From among [many definitions of wisdom](#), the following is chosen as the basis for this index.

Wisdom: “The capacity, the desire, and the active endeavor to realize what is of value in life, for oneself and others.”¹

The phrase “wise outcome” is sometimes used in this text as shorthand for the above definition. It is a synonym for [doing good](#).

¹ This definition of wisdom is advocated by philosopher [Nicholas Maxwell](#). See, for example [knowledgetowisdom.org](#)

Collective Wisdom

Group results vary widely, seemingly independent of the wisdom the individuals making up the group. Some groups of wise individuals seem to obtain poor results, yet there are impressive examples of ordinary people coming together to obtain extraordinary results. Therefore a separate index is used to evaluate the wisdom of a *group* independently from the wisdom of the individuals making up that group.

A key question for evaluating the wisdom of a group is this: **Did the collective group arrive at a wiser outcome than any individual member of the group would have been likely to have arrived at?**

The Collective Wisdom Institute Model — Inspiring the Index Alpha

While the statements used to make up this scale are my own, they are largely inspired by the principles and accounts in the book *The power of collective wisdom and the trap of collective Folly*, by Alan Briskin, Sheryl Erickson, John Ott, and Tom Callanan Published October 1, 2009 by Berrett-Koehler. This book is a result of the work of the [Collective Wisdom Initiative](#).

Section 1 — Deep Listening.

The intent of this section is to determine the extent to which group members have an authentic curiosity about what is *really* going on inside the person, the group, or the larger collective. To what degree do empathy and compassion support the unity of the group?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members listen deeply and carefully to each other with the goal of learning rather than responding.
- ◆ Group members experience empathy toward other group members.
- ◆ Group members experience empathy toward a broad range of stakeholders.
- ◆ Group members are compassionate toward other group members.
- ◆ Group members are compassionate toward a broad range of stakeholders.
- ◆ Group members are curious to understand what is really going on inside of each of the other group members.
- ◆ Group members are curious to understand what is really going on inside of a broad range of stakeholders.
- ◆ Group members can reliably sense all of what others mean, hearing between the words.
- ◆ Group members are free to speak their mind.
- ◆ Group members speak their mind.
- ◆ I listen deeply to each of the other group members.

Section 2 — Suspending Certainty

The intent of this section is to determine the extent to which group members suspend their certainty and are willing to [deferring judgment](#) and allow a new truth to emerge from the work of the group.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members defer their certainty while they explore doubt and new possibilities.
- ◆ Group members are willing to disclose their own doubts about their original beliefs and opinions.
- ◆ Group members are willing to acknowledge what they don't know and don't understand.
- ◆ Group members remain curious while they identify and examine your assumptions and theirs.
- ◆ Group members primarily communicate by skillfully using dialogue.
- ◆ Group members are genuinely curious. They ask questions to gain further insight.
- ◆ Group members embrace the wisdom of nature and beauty.
- ◆ I suspend my judgments and work to understand each group member's viewpoint before forming my opinions, beliefs, and decisions.

Section 3 — Seeing whole systems and seeking diverse perspectives

The intent of this section is to determine the extent to which group members are seeing whole systems and seeking diverse perspectives. Are group members shifting attention from themselves to the group? Do members recognize that each diverse perspective is one part of the whole? Do members seek the origins of [positive deviance](#) through [appreciative inquiry](#) to understand solutions that now exist within the system? Collective wisdom is more likely to arise when we do not see ourselves as experts separated from others.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members feel safe placing the needs of the whole ahead of their own selfish needs.
- ◆ Group members are willing to expose personal vulnerabilities to other group members.
- ◆ Members feel they belong in the group and to the group.
- ◆ Members truly care about the work of the group.
- ◆ Members are inspired and motivated to create a *wise outcome*— to realize what is of value in life, for oneself and others—as a result of the work of the group.
- ◆ Members are truly interested in exploring the diverse perspectives that arise from the group's composition, dialogue, inquiry, and on-going work.
- ◆ Group members learn from what is already working.
- ◆ Group members pay attention to what may be overlooked, omitted, sidetracked, or marginalized and work to expose and include this information.
- ◆ Group members honor different perspectives as essential glimpses into the whole.
- ◆ Group members embrace conflict as an opportunity for a higher order resolution.
- ◆ Group members work to [transcend conflict](#).
- ◆ Group members understand that conflict is inevitable and they work to [resolve it constructively](#).
- ◆ As each conflict surfaces and is constructively resolved, relationships improve rather than deteriorate.
- ◆ Tensions within the group are allowed to surface, be thoroughly explored, and are resolved at their root.
- ◆ Group members seek out, create, and welcome new alternatives for arriving at *wise outcomes*.
- ◆ Group members seek out, welcome, explore, amplify, and embrace new insights arising from the group.
- ◆ I am inspired by the work of the group.

Section 4 — Respect for others and group discernment

The intent of this section is to determine the extent to which group members demonstrate respect for others and group discernment. Do members strive to improve the quality of the connections among group members

and the essential connections each make to those outside the group? Do members recognize that dissent is an avenue for new learning? Are they creating an ability to find new common ground? Do members embrace higher order values such as [good-faith](#), [justice](#), [compassion](#), and [tolerance](#)? Do members [trust](#) each other? “Real [dialogue](#) is where two or more people become willing to suspend their certainty in each other’s presence.” Is real dialogue emerging to provide a deeper understanding?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Members are sincere and authentic.
- ◆ Members act sincerely and authentically.
- ◆ Members treat all others with dignity and respect.
- ◆ Members respect and value the contributions of all others.
- ◆ Members consistently act from [moral virtue](#).
- ◆ Personal stories are shared and used to reveal the deeper truth motivating each group member’s viewpoints.
- ◆ Conflict is seen as an opportunity to explore and embrace a deeper understanding of the true complexity of the situation.
- ◆ Constructive learning and member engagement is more important than winning or losing.
- ◆ Group members respect their common humanity.
- ◆ Group members are understood by other members.
- ◆ Group members care for each other and about each other.
- ◆ Group members feel safe within the group, even amid uncertainty.
- ◆ Group members seek a common wisdom and allow it to emerge from the group.
- ◆ Group members seek common ground, often in uncommon places.
- ◆ Group members demonstrate their [courage](#) in various forms motivated by their commitment to find a *wise outcome*.
- ◆ Group members are committed to overcome obstacles and achieve a *wise outcome*.
- ◆ I respect each member of the group.
- ◆ I feel respected by each member of the group.

Section 5 — Welcoming all that is arising

The intent of this section is to determine the extent to which group members welcome all that is arising. Do members embrace unexpected participants and allow unplanned events to contribute to the solution? A constant trust in the transcendent provides the confidence and patience often required for the connections to be made and the wisdom to emerge. Do members demonstrate that trust, confidence, and patience?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members understand that group wisdom may emerge in unexpected ways.
- ◆ Unexpected events are welcomed, contemplated, and embraced as a source of creative solutions.
- ◆ Group members accept all that is—what is *actually* happening.
- ◆ Group members are [mindful](#) and present.
- ◆ The group works in a space that is safe for inquiry and exploration of new and surprising ideas.

- ◆ [Serendipity](#) is welcome.
- ◆ Questions, especially those leading to clearer thinking or to deeper insights, are welcome.
- ◆ Curiosity prevails.
- ◆ Members enjoy wearing each of the [six thinking hats](#) in turn.
- ◆ The group is resilient.
- ◆ Group members are aware of the potential for good to emerge from the group, and then help to make that happen.
- ◆ Group members have [fun](#) as they solve problems.

Section 6 — Concern for the future

Members have an essential concern for the future, including the future well-being of all. Alternatives and results are assessed from various perspectives including long term, short term, and midterm and from a broad scope.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ The group has chosen its goals wisely. The goals are pro-social and benefit the greater well-being considered over a broad scope and long time frame. In short, the group is committed to seeking a long lasting *wise outcome*.
- ◆ Group members work from a [global perspective](#) whenever they identify, select, define, and solve problems.
- ◆ The group is aware of the [grand challenges](#).
- ◆ The group understands how their work contributes to overcoming the [grand challenges](#).
- ◆ Group members focus primarily on the long-term implications and consequences of their decisions and actions.
- ◆ Short-term and mid-term needs and goals are adequately addressed.
- ◆ The group favors prevention-based solution approaches rather than primarily treating consequences or symptoms.
- ◆ The group considers a broad perspective in defining and solving problems.
- ◆ The needs of a broad set of stakeholders are considered in defining and solving problems.
- ◆ The group makes [wise decisions](#).
- ◆ The group achieves excellent results, evaluated in the long term.
- ◆ The group achieves excellent results, evaluated in the mid-term.
- ◆ The group achieves excellent results, evaluated in the short term.
- ◆ The group achieves excellent results, evaluated from a [global perspective](#) .

Section 7 — Connection to the Whole

Members have a strong connection to the whole.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ The group seeks collective wisdom.
- ◆ Group members are primarily interested in the greater good.
- ◆ Group members put aside narrow or selfish concerns.

- ◆ Group members are unmotivated by selfish interests.
- ◆ Group members create new alternatives for mutual gain.
- ◆ Group members offer creative solutions for the greater good.
- ◆ Group members are primarily motivated to benefit the whole.
- ◆ Group members act unselfishly.
- ◆ Group members act [courageously](#).
- ◆ Group members work toward the goals of the group.
- ◆ I am working toward the goals of the group.

Section 8 — Humanity

Human values and well-being for all are paramount. First do no harm. Roman playwright and freed slave [Terence](#) declared: “I am a human being. Nothing that is human is alien to me.” How well do group members hold on to this profound belief to ensure the collective cannot possibly fragment and draw away from wisdom?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ The [dignity](#) of all humans, inside and outside the group, is recognized, protected, preserved, and valued.
- ◆ [Human rights](#) are protected for all.
- ◆ The well-being of all, inside and outside of the group, is paramount.
- ◆ No one is exploited.
- ◆ Harm to others, inside and outside the group is forbidden.
- ◆ Lying, deceiving, cheating, stealing, humiliating, or otherwise harming or disrespecting others—inside or outside the group—is never tolerated.
- ◆ [Forgiveness](#) is chosen over [revenge](#).

Section 9 — Humility

Wisdom manifests in [humility](#) rather than arrogance. Humility unleashes the capacity for learning rather than rigidity and dogma.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members listen deeply and carefully to each other.
- ◆ Group members approach each other from a stance of humility.
- ◆ Egocentric behavior is absent from the group.
- ◆ Group members readily learn from each other.
- ◆ Group members are skillful at [dialogue](#).
- ◆ Group members consistently use dialogue as their preferred form of communication.
- ◆ Group members [suspend judgment](#) to better listen and learn.
- ◆ Group members [balance inquiry and advocacy](#).
- ◆ Group members rely on relevant facts and representative [evidence](#) rather than on ideology and dogma.
- ◆ Group members recognize that “facts are our friends” and welcome information, convenient or otherwise.

Section 10 — Trust

Trust is essential. Group members must be trustworthy and must perceive others as trustworthy.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Group members [trust](#) each other.
- ◆ The [virtue of justice](#) is wisely applied by the group members.
- ◆ The virtue of [courage](#) is wisely exercised by group members.
- ◆ Group members consistently act in [good faith](#)—consistently striving to communicate truthfully and [candidly](#) with each other.
- ◆ Group members are impeccable with their word.
- ◆ Group members make and keep commitments.
- ◆ Manipulation, conniving, scheming, and deception are all absent.
- ◆ Communication is efficient. Group members quickly receive relevant communications without being distracted by irrelevant communications.
- ◆ [Logical fallacies](#) are quickly identified and corrected.
- ◆ Factual errors, and misleading statements, are quickly identified and corrected.
- ◆ Unwarranted assumptions are quickly identified and corrected.
- ◆ I am trustworthy.
- ◆ I find the other group members trustworthy.

Section 11 — Wielding Power, Harnessing Power, Human Agency

Using terms originated by [Mary Follett](#), does the group use *power over* to subordinate members and ideas, or do they develop *power with* to combine and amplify the power within each group member? Is power used in *opposition*, one member against another, or in *combination*, (alignment), each member adding to the power of the others?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Members do not use power to dominate, suppress, coerce, or obstruct other members.
- ◆ Members align each of their individual powers to solve group-level problems.
- ◆ Each member treats all other members as peers.
- ◆ Power differentials are overcome.
- ◆ Members do not use power to suppress information or discount facts or opinions.
- ◆ All voices are welcome to be heard.
- ◆ Participation is balanced among all the group members. Each of the group members is sincerely engaged in the work of the group. Each has an opportunity to speak and be heard. Work is shared such that no one is overloaded and no one is left out.

Section 12 — Avoiding the Collective Folly of Fragmentation

Collective folly runs rampant when separation and fragmentation predominate. The group must work to overcome latent or emerging tendencies to fragment the group.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ The group resists and overcomes tendencies that seek to separate the group into subgroups or factions.
- ◆ The group resists and overcomes tendencies toward fragmentation.
- ◆ The group resists and overcomes tendencies toward polarization.
- ◆ Group members embrace rather than distance themselves from the “other.”
- ◆ The group resists and overcomes tendencies to identify a [scapegoat](#).
- ◆ The group is careful not to assign [blame](#) for problems the group is facing to elements or causes outside of the group.
- ◆ [Ad hominem](#) attacks and name calling by group members are unthinkable.
- ◆ Group members overcome [confirmation bias](#)—a tendency to search for and interpret information in ways that confirm their existing beliefs or self-interests.

Section 13 — Avoiding the Collective Folly of False or Fragile Agreement

A more subtle pattern of collective folly is the false or fragile agreement.

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- ◆ Objections are identified, made visible, thoroughly discussed, and resolved at their [root](#).
- ◆ Differences of viewpoint, belief, and opinion are openly identified, made visible, thoroughly discussed, and resolved at their root.
- ◆ Members who hold differing points of view are able to thoroughly and accurately describe the viewpoint of others they disagree with.
- ◆ Dissenting views are thoroughly explored rather than discounted, marginalized, or censored.
- ◆ Dissent is welcomed and encouraged within the group where it is resolved. Therefore dissent never occurs outside the group.
- ◆ Agreements are genuine and long lasting.
- ◆ Group members make and keep commitments.
- ◆ Communications are authentic.
- ◆ Group members never sabotage or undermine the group’s decision.
- ◆ Group members trust each other completely.

Section 14 — Results

Did the group amplify the wisdom of the individual members, or did the group fall into the trap of collective folly?

Rate each of the following statements on a scale ranging from 1 = Strongly Disagree through 5=Strongly Agree.

- The collective group arrived at a wiser outcome than any individual member of the group would have been likely to have arrived at.
- A collective wisdom emerged from the group.
- The group successfully avoided the traps of collective folly.
- The group successfully focused on [what matters](#) most.
- I am pleased with the outcome the group arrived at.
- I am proud to be a member of this group.

Interpreting Assessment Results

Higher assessment scores indicate the potential for collective wisdom to emerge from the group. Lower scores warn that the group may have fallen into the trap of collective folly.

A key question for evaluating the wisdom of a group is this: **Did the collective group arrive at a wiser outcome than any individual member of the group would have been likely to have arrived at?**

Did a majority of group members agree the collective group is working toward a wiser outcome than any individual member of the group would have been likely to arrive at? If so, then the group should continue working on its task with renewed confidence. If not, then the group must suspend its task work to improve the relationships among group members. The group can begin by reviewing the results of this assessment and frankly addressing those areas receiving the lowest scores. Work to improve relationships and continue to reassess until collective wisdom emerges. There is no reason to continue the task work of the group if the likely result is collective folly.

If the group decides it must increase its collective wisdom, it may be most fruitful to begin by discussing the trustworthiness of group members.