



Getting on **Brilliantly**

**Recipes for managing
successful meetings**

Annette Zera
Susan Murray

www.gettingonbrilliantly.co.uk



**When the wind of change blows
some build walls
others build windmills**



CHINESE PROVERB

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If you want help with designing or
facilitating a meeting contact Annette
at azera@gettingonbrilliantly.co.uk

Introduction

Welcome to the online version of 'Getting on Brilliantly'.

This book grew from the conviction that most people come to work caring deeply about what they do and willing to take responsibility for what happens.

Annette Zera and Susan Murray believe that when people are able to express their passion for their work, are encouraged to reflect, plan and work together on the issues that matter, whatever their job or status, radical improvements follow.

This is hardly a new idea but it is surprising how little it is recognised. The authors have tested it extensively, Susan through her consulting work and Annette with the thousands of people who worked together to create one of the most successful colleges in the UK at that time. Annette now works as a facilitator and a trainer in leadership and management. You can find out more about her work at www.gettingonbrilliantly.co.uk

So this book is born out of belief and rooted in experience. The authors' work has been informed by 'whole systems' thinking and the bibliography lists some recommended texts. Active management and participation are the heart of the matter. Most leaders aspire to this but many are unsure how to create a balance of power and participation. All too often they fall back upon bureaucratic models or command and control. This book provides some practical alternatives.

It is essentially a workbook, a collection of recipes, process tools and ideas that help people to work well together in groups. It is modelled on a cookery book. Good recipe books set out clearly what the dish will be like and tell you how to create it with clear step-by-step instructions. You don't need to be an expert or external consultant. The recipes are easy to use and they work.

The book is written for innovative leaders, for managers, for anyone wanting to develop their facilitation skills. The process tools apply to meetings large and small in most organisations. Leaders everywhere need to design their meetings to bring out the best from all their staff.

Using process tools will have a direct impact on organisational health, balance and results.

There are several different ways to use this book. You can take an 'A la carte' approach by looking at the index and dipping in and out to find a technique appropriate to your particular situation. Or you can read the selection of 'Set menus' in Section 1. These are combinations of tools that work well together.

However you use this book it will help you and your colleagues get on brilliantly.

Acknowledgements

Thanks go to our families: Claire, Jim, Tom, Sue, Amanda, Steven, Shea, Emma and Eli for their support through our leadership and consulting adventures; to the too-many-to-name leaders, facilitators and writers who have taught us everything we know about participatory processes for inclusion, and most particularly to the governors, staff and students of Tower Hamlets College who got on brilliantly.

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Section 1

Read this section

Process

How to use this book

Essential ingredients

Our starting point

Reinventing meetings

Too many people endure meetings just longing for them to end

Purpose, content and creating an agenda

We tend to get stuck creating agendas one way; here are five alternatives

Inviting people to participate and to leave

It is worth making an invitation to a meeting just that, an invitation

Stating the obvious

Behaviour that promotes success

Understanding helpful and unhelpful behaviour in groups

It helps if you know what to look out for in yourself and others

Ground rules

Basic behavioural building blocks

Roles to balance power and participation

Alternatives to chairs

Working in groups and pairs

The best and simplest way to get everyone involved

Reporting back painlessly

Sharing ideas can be invigorating

Space and time

The right space and congenial conditions help bring out the best in people

Being prepared

Having the materials for the job

Set menus

A la carte menu

How to use this book

Imagine your team is meeting later today. It could be a routine staff meeting or one convened for a specific purpose.

Whatever the purpose of the meeting, it will help if you think about planning the meeting as a teacher might plan a lesson. This workbook will help you do this.

First of all, read Section 1 to think about preparation, planning and processes.

Then design your meeting by selecting tools from the different sections. You can do this by asking yourself these questions:

- How will I start the meeting? Choose a process from Section 2.
- Are we clear about what we need to discuss and who should be involved? See Section 3.
- What do we need to know? Choose a process from Section 4.
- Would it help to analyse our situation? Choose a process from Section 5.
- Do we need some new ideas? Choose a process from Section 6.
- Are our assumptions correct? See Section 7.
- Is it likely that there will be competing or conflicting priorities? Choose a process from Section 8.
- Section 9 contains a variety of templates to support action planning.
- What is the best way to end the meeting? Choose a process from Section 12.

Sometimes meetings get stuck, or people in the team are at odds with each other. Sections 10 and 11 have some useful tools for helping in these situations. We recommend you read the descriptions of some adventurous large-scale processes in Section 13. These are excellent frameworks for focused meetings and organisational development but most benefit from expert facilitation.

Section 14 describes easy-to-use drawing techniques that illustrate points and move discussions forward.



There are also full page templates of handouts to photocopy or print. You will find this icon on pages which have a template reproduced at the back of this book and on the attached CD-Rom.

Essential ingredients

Our starting point

Over the past 20 years the concept of organisation and management has moved to include more imaginative, fluid and holistic models. Whole systems and learning organisation theories are starting to have a major impact on 21st-century management.

None of this is rocket science. As Peter Senge, author of *The Fifth Discipline*, puts it:

'Most of us at one time or another have been part of a great "team", a group of people who functioned together in an extraordinary way – who trusted one another, who complemented each other's strengths and compensated for each other's limitations, who had common goals that were larger than individual goals, and who produced extraordinary results... The team that became great didn't start off great – it learned how to produce extraordinary results.'

This workbook is based on the belief that some of the essential ingredients to produce extraordinary results are:

A shared vision

Everyone in an organisation needs to feel part of a whole system pursuing a common direction.

'Where there is no vision the people will perish.' [Proverbs]

If people are to work well, the vision and values of the organisation need to be explicit and shared.

Trust and confidence

Good leaders and positive team members are usually people who are secure in themselves. Insecure leaders tend to create insecure environments through fear, meddling, disorganisation or abuse of power. Most people working in an insecure environment find it hard to be open and fully committed. When there is confidence and trust, people flourish and results improve.

Intelligent accountability

Intelligent accountability links assessment with improvement. Often methods of accountability are more concerned with judgment than development, with audit rather than honesty. Accountability based on intelligent and collectively agreed criteria is more likely to command respect and provide a catalyst for change and improvement.

Passion and responsibility

Most people come to work caring deeply about what they do. But all too often they leave their passion, and occasionally their sense of responsibility, at home. The workplace can be inspiring and creative when people can bring their whole selves to work.

Imagination

Being able to 'picture the scene' or 'put yourself in someone else's shoes' is a critical leadership quality. When the leader can imagine what it is like to be someone else, to have their point of view, it can make all the difference to how working, learning relationships flourish.

Balance of power and participation

The way meetings, groups and organisations are run is often very wasteful of talent and intelligence. Leaders and leadership skills are present across every organisation, not just at the top. When everyone has the opportunity to be actively involved, to bring their energy, enthusiasm and ideas to work then better decisions get made. Creating a balance of power and participation is what this workbook is all about.

Reinventing meetings

Too many people endure meetings just longing for them to end

Although meetings are supposed to accomplish some important things (like inform, plan, process information, make decisions, solve problems, evaluate, increase morale, cooperation, commitment and communication), many frequently fall short.

Harrison Owen, the originator of one of the most creative meeting frameworks, Open Space Technology (see the next page and Section 13, hit the nail on the head when he observed that the time in meetings when people are often most animated, energetic and creative is the coffee break. His aim in creating the design elements of Open Space was to capture the same level of participation, creativity and focus as he had seen in coffee breaks.

Meetings work well when:

- The purpose is clear.
- Members create the agenda so it reflects the expertise and interests of those present.
- The leader encourages self-management, reinforced by agreed roles and standards of group behaviour.
- Disagreement is considered a natural part of meetings and problem-solving processes keep disagreements focused on issues.
- People don't dread coming to the meeting; the atmosphere is congenial.
- People are expected to leave the meeting if they find they cannot contribute. This is in everyone's interests. If someone is not learning or participating it is likely their presence will be a drain on others.

The meetings that you take part in as a result of picking up this book will be very different. They will be vigorous and energetic. Their focus will be sharp as a razor and yet allow for raggedy creative thinking. Interpersonal tensions will be constrained and people challenged to find new ways of working together. They will accomplish what they set out to do and do it well.

Purpose, content and creating an agenda

We tend to get stuck creating agendas one way; here are five alternatives



Use Steven Covey's quadrants This process makes people think about long-range planning without forgetting the things that are urgent. You put a poster like this on a notice board:

Agenda quadrants: Post your agenda items for our next meeting	
1 Urgent and important	2 Not urgent, but important
<ul style="list-style-type: none"> ● Crises ● Pressing issues ● Deadline-driven projects 	<ul style="list-style-type: none"> ● Planning ● Preventive problem solving ● Exploring new opportunities
3 Urgent, but not important	4 Not urgent and not important
<ul style="list-style-type: none"> ● Requests that may not be relevant ● Personal agendas that may not be relevant ● Things that could be delegated 	<ul style="list-style-type: none"> ● Small issues ● Easy things that can waste time ● Things that could be forgotten

People write their agenda items on Post-it notes and place them on one of the quadrants with their name and the time needed for discussion. The items are reviewed at the start of the meeting and put in order of importance or assigned to another time. Encourage the use of quadrant two (Not urgent, but important) because it encourages longer-term thinking rather than fire fighting.

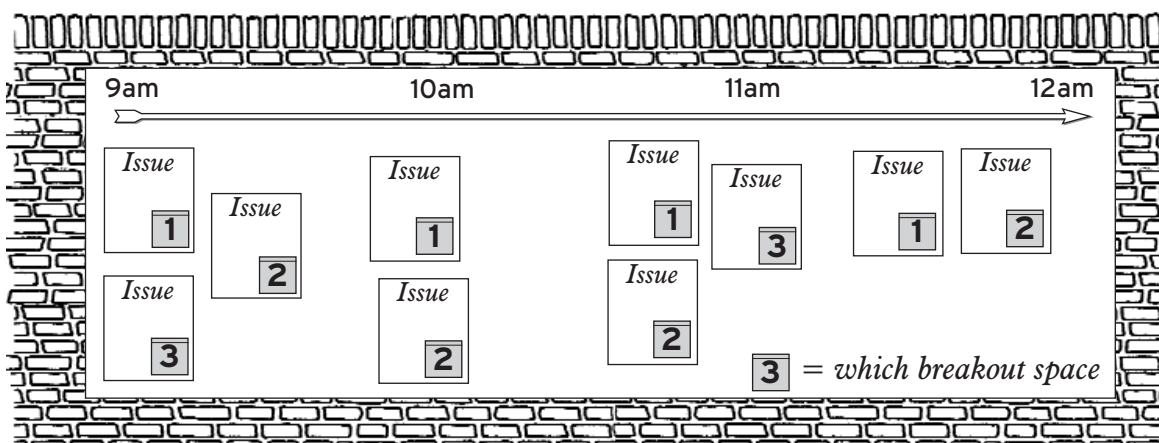
Brainstorm (see page 69) At the end of a meeting brainstorm the agenda for the next one.

Invite ideas from colleagues by email.

Use a schedule for the month or year with particular routine items programmed on particular dates.

Open Space is generally used for big consultation or planning events. It can, however, be used for smaller task groups or routine meetings. This is what you do:

- i Agree the purpose of the meeting and invite all those who have expertise or interest.
- ii Ask people to identify their issues connected to the purpose of the meeting.
- iii Post their issues on the wall in pre-determined time slots and break-out spaces.



- iv Invite people to form groups or pairs around the issues on the wall that interest them.
- v Share recommendations, prioritise and action plan as appropriate.

Inviting people to participate and to leave

It is worth making an invitation to a meeting just that, an invitation

Inviting people to a meeting gives everyone the chance to choose for themselves whether to be there or not. People need to be clear about what the purpose of the meeting is so they can decide if they should attend. If someone you expect doesn't turn up then ask them why. This is better than routine attendance whilst the problems simmer under the table.

Encouraging people to use the 'law of two feet'

When people find themselves in the wrong meeting it can, at best, be a waste of their time and, at worst, do damage to the group. The law of two feet is an edict borrowed from Open Space (see page 124) and worth introducing more generally. It allows people to leave (and join) meetings quietly and without a fuss so as to preserve the sanity of the individual and the positive energy of the discussion.

One caveat with this practice is important. If people decide not to participate, they need to understand that decisions will be made without them. In conflicted situations some people may choose to stay away to sabotage a decision or process. If an organisation is going to encourage a real model of involvement from staff, the leaders must be willing to deal with passive aggressive behaviour of this kind.

Here are some questions to ask to determine who should attend the meeting:

- Who are the key people with information, or investment, or experience?
- Are there people with good ideas and good process skills we don't normally think of?
- Who will want to be there?
- Who is making the decisions?
- Who will influence the use of resources?
- Who needs to understand and be involved in the decision so it can be moved along?
- Can people with opposing views be helped to look at different sides of the issue or will they just be a barrier to progress?
- Are all key groups, reflecting demographics and stakeholders, represented?
- Who has an important or interesting perspective?
- Are there any outside participants who should be invited?
- Who did we miss?

Stating the obvious

Behaviour that promotes success

We know from research the conditions groups need to function well. The research group Mink (Management of Innovation and Knowledge) identified that groups work better when people:

- feel they contribute and are valued for their work
- believe their group can solve problems and deal with differences constructively
- learn from both good and bad experiences
- feel accepted, respected and listened to
- know they are accomplishing something, and their time is used well
- have or can get relevant information to clarify their work
- enjoy a work environment that is responsive and inclusive
- appreciate each other and are inspired by the interaction.

Confidence and a sense of wellbeing come from successful interaction. With each success, a group's ability to work together is strengthened. Conversely, when groups are dysfunctional, it gets harder and harder to get even the ordinary things done.

Understanding helpful and unhelpful behaviour in groups

It helps if you know what to look out for in yourself and others

Purpose	Helpful behaviour	Unhelpful behaviour
Defining a problem	<ul style="list-style-type: none"> Exploring perspectives Asking questions Clarifying information and issues Framing the issue Listening to understand Understanding all sides Developing a common view Summarising 	<ul style="list-style-type: none"> Lack of clear focus Tunnel vision Self-interest Not listening Rebuttals No summary or framing Splitting hairs Rushing to conclusions
Gathering data	<ul style="list-style-type: none"> Sharing the facts Developing hypotheses Asking more questions 	<ul style="list-style-type: none"> Rushing to conclusions Using anecdotal evidence Reacting too fast Opinions without facts Discounting information
Using information to set goals and plans	<ul style="list-style-type: none"> Agreeing the goal Looking for standards/priorities Analysing information Generating alternatives Considering diverse views Creative thinking Enthusiasm Experimentation Taking risks Encouraging each other 	<ul style="list-style-type: none"> Planning before visioning Discounting information Over-analysing Limited thinking Cynicism Silent dissent Rhetoric Personal attack
Testing alternatives and selecting a way forward	<ul style="list-style-type: none"> Analysing forces/influences Imagining the impact Weighing up pros and cons Summarising Looking for agreement Checking 	<ul style="list-style-type: none"> Closing down alternatives Emotional responses Too much self-interest Being muddled Divisive voting Rushing ahead
Implementation	<ul style="list-style-type: none"> Setting and monitoring benchmarks Respecting roles Looking for ways to help 	<ul style="list-style-type: none"> No clear expectations of time or target Doing each other's jobs
Evaluation	<ul style="list-style-type: none"> Admitting mistakes Enjoying success Constructive criticism Learning for next time 	<ul style="list-style-type: none"> Attack or admonishment Taking for granted Undermining Moving on too fast

Ground rules

Basic behavioural building blocks

Ground rules are often derided because people make them up and then ignore them. Most of the time this does not matter but with some groups, and especially those where there is conflict, it is really important to emphasise the value of ground rules. They set expectations and are a tool for holding people accountable for their behaviour.

There are, of course, different behavioural expectations in different work environments. For example, is interrupting and rudeness acceptable? One person may constantly interrupt but, when another team member comments on this behaviour, will counter 'Well, who put you in charge?' It is hard to act 'responsibly' without collective agreement on standards. When ground rules are used, they allow everyone to talk with legitimacy about inappropriate behaviour.

Ground rules work best when they are devised by the team but here are some suggestions to consider:

- All ideas have value, avoid 'idea-killer' language; it is possible to disagree without denigrating.
- Make sure all group members contribute their ideas and opinions.
- No long stories, try to be succinct.
- Limit side conversations.
- Don't start evaluating ideas during a brainstorming session.
- Listen to understand - let people finish their thoughts.
- Speak for yourself.
- Don't interrupt each other.
- When bored or unable to contribute to a discussion, for whatever reason, leave the meeting.

Post ground rules on the wall in meeting rooms. It is best not to have too many, but try to use them.

Roles to balance power and participation

Alternatives to chairs

Traditional meetings place most of the responsibility for organisation on the chairperson. The chair often sets the agenda, prioritises discussion, conducts the meeting and decides what will go forward. This is both a burden for the person in this role and an inhibitor for the group. Everyone feels more involved and interested when they take a share in the responsibility.

The roles below can be rotated so that everyone has a chance to develop their skills and to understand the challenges of that role. When roles are first used in groups, it can help to put a card on the table to identify the person in the role.

Facilitator

The facilitator ensures balanced participation by encouraging everyone to speak and making sure no one is left out. They also participate as a group member. The facilitator supports and encourages members to express different perspectives. When decisions or recommendations are made, facilitators help to clarify and summarise what should be reported. Their job includes checking the accuracy of the summary with the group. It helps if the facilitator can:

- ask open-ended questions
- use requests
- use positive reinforcement
- redirect questions/defer to the group
- ask for specifics to clarify and focus
- encourage under/non-participants and manage over-participants
- ask for different points of view
- pose options
- paraphrase for clarity and understanding
- make differences constructive through use of process tools
- summarise outcomes, agreements and assignments
- communicate between meetings so people are informed and come prepared.

Focuser

This person keeps track of the time allocated for each task. S/he also helps the group notice when they are off-task or not following ground rules. S/he brings the group back in focus.

Notetaker

This person collects key ideas, records recommendations and the decisions that the group wants to move forward. S/he should make sure that what is written has the agreement of the full group. (Comments on spelling or handwriting should be discouraged because they can undermine the notetaker and distract from the discussion.)

Reporter

If the group needs to feed back to a larger group, it is useful to have a person assigned to this role. The reporter's presentation should be brief and accurately represent the group's ideas.

Working in groups and pairs

The best and simplest way to get everyone involved

It is difficult for everyone to participate fully in a group discussion if there are more than ten people in the group. Of course, any number of people can be invited, but it is sensible for a large number to divide into small groups or pairs. It can take some courage to ask a meeting to divide into twos, threes or sixes for the first time, but the result is worth it.

There are many ways of arranging pairs and groups. The simplest way is to give the instruction to divide up and let members take the responsibility for sorting out how to do it for themselves. However, if you think there are too many group relationship issues or people seem a little hesitant, then you can use **mixers**.

Here are some ideas:

- Attach different coloured dots to the backs of chairs - groups are formed by colour.
- Put different coloured stickers on hand outs or name tags - again groups are formed by colour.
- Use a deck of cards sorted into the number of groups you need.
- Assign numbers - 1, 2, 3 and so on - randomly, and people with the same number form a group.
- After a brainstorm to create an agenda, invite people to put their initials against the items they want to work on. These people form groups.
- Ask members to choose partner/group from those who they don't know well.
- Post flipcharts with different topics around the room and get people to take their chairs to the one they want to work on. Create second groups on the topic if there are too many for one group.
- Use the Open Space process (see page 124).

Feeding back from individual, pair and group work

Feedback sessions from groups are often very tedious. Only use feedback if you need it to contribute to recommendations or decisions. To avoid repetition and keep people engaged you can:

- ask for feedback in the form of a small number of succinct recommendations
- take a point from each group in turn until all are exhausted
- ask one group to lead the feedback and others to endorse their points if the same or add anything they have not included at the end
- put flipchart notes from groups on the wall; one person from the group stays with the flipchart to explain their thinking; everyone else goes to inspect each other's conclusions.

(See also Active reporting-back activity on the next page.)

Group size and time

When there are more people, either in more groups or in a larger group, everything takes longer. Plan for this contingency when you are assigning time for your agenda.

Reporting back painlessly

Sharing ideas can be invigorating

This is an active reporting-back activity. It takes no more time and is less tedious than verbal reports.

1 Each group creates a flipchart summary of their idea or proposal. This is best done in a common format provided by the session leader.

2 A reporter from each group stations themselves in different areas of the room. They take their summary flipchart and two marker pens with them.

3 Other members of their group and other groups rotate around the room whilst each reporter explains their group's flipchart information. Explanations should be brief, but have enough substance so people can comment, question and respond.

4 The reporter asks for questions and answers what s/he can. S/he notes the questions that could be used to strengthen or improve the recommendations. S/he also adds substantive comments that could help the group.

5 After three to five minutes the groups move to the next area. This continues until all groups have heard each reporter.

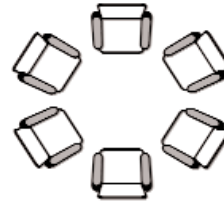
6 Groups return to their original reporter who briefs them on feedback, comments, questions and new ideas from the other participants. Group members fill the reporter in on key ideas and suggestions from other groups. Revisions to the report are made as needed, and the report is submitted in whatever form is useful.

Space and time

The right space and congenial conditions help bring out the best in people

Attending to the following things helps:

- Arrange chairs in a circle without a table. The archetype of the circle has proved itself conducive to good communications for centuries. Sitting in this way means that everyone can see each other easily and without barriers.



- Meet in a light and airy room. The room should be the right size for the number of people with room to move around. If you are working in groups make sure there are adequate break-out spaces.

- Have lots of wall space on which you are free to stick paper.

- Have food and drink easily available.

- Comfortable chairs, particularly for longer sessions.

- Notice and welcome people as they arrive.

- Play music as people arrive.

- Take breaks. Breaks are one of the most forgotten tools in meetings. People need a little breathing and thinking room. It also helps to let participants know about the break in advance - research on learning shows that learners are most receptive just before a break.

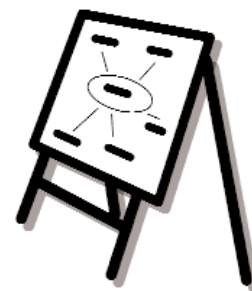
- Stand up to meet if the issue can be resolved quickly.

- Go for a walk in pairs or small groups. Getting some movement, particularly when meeting after lunch, enlivens the discussion.

Setting up a graffiti wall

A graffiti wall is a flipchart or a piece of wallpaper stuck to the wall and a pen.

Its purpose is to give people a chance to express themselves in different ways, to draw, to write things, to say the unsayable sometimes.



Setting up a parking space for ideas that are off-topic but important

A parking space (flipchart posted for this purpose) can be used to capture ideas, questions and issues not directly related to the focus of the session, but nonetheless important. At the end of the meeting topics are reviewed for possible future action.

Being prepared

Having the materials for the job

It is really useful to keep a toolbox of materials for meetings. For many of the processes outlined in this workbook you will need:

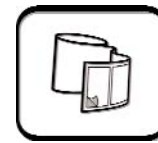
- Marker pens
- Masking tape
- Sticky labels for name tags
- Sticky coloured dots
- Pens
- Coloured pencils
- Paper
- Scissors
- Envelopes



Scissors



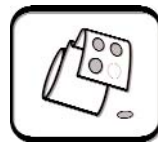
Pens



Sticky labels



Paper



Sticky dots



Masking tape



Envelopes



Post-it notes

The bigger items include:

- Flipchart paper and flipchart holders
- Rolls of lining wallpaper
- Spraymount glue



Flipchart



Wallpaper



Spraymount

It is also handy to have:

- Tibetan or chime bells to get the group's attention
- A wind-up egg timer
- A CD player and variety of music

If these materials are kept and replenished in the rooms used for meetings people will think more readily about using them. They encourage a group process mentality.

Set menus

In the beginning it isn't always obvious what tools will work in different situations. The only real answer is trial and error but here are some combinations that can work well together.

Developing ideas

Negative brainstorming p70
or *Blue sky* p67
to generate ideas

Need a fresh perspective? p102
or *Is/is not* p103
to start thinking in a new way

Edward De Bono's six hats p72
to consider value of different ideas

Evaluating progress

Metaphor starter p34
for a light-hearted starter

Pie chart p64, or *Spider diagram* p62
for analysis of progress

Structured brainstorming p69
for focus on analysis

Action planning tools Section 9, p91
for next steps

Trying to change

Packing my bags p31
to determine what should be retained

Creating our history p29
or *Situation target plan* p56
to give understanding of where we are

Scenario Planning p127
to project possible futures

Making a commitment p97
to move to action

Developing governance

Who rode the elephant? p28
to deepen relationships and understand skills

Sticky wickets p33
to identify personal preferences and irritants

Brainstorming p69, or *Affinity grouping* p71
to generate values and goals

Prioritising tools Section 8, p83
to get agreement on values and goals

Spider diagram p62
for checking progress on past goals

Responsibility matrix p95
to assign roles

Decision making

Why am I here? p27
to identify interests and commitment

Framing tools p38
to clarify focus

Identifying parameters p42
to understand the constraints

Affinity grouping p71
to generate ideas

Stop, caution and go p85
or *Weighted voting* p86
to prioritise

Action planning tools Section 9, p91
to move to action

Strategic planning

Creating our history p29
to create common understanding

Blue sky p67
to identify vision

On the horizon p51
to project future challenges and opportunities

Scenario planning p127
or *Mind maps* p49
to create options

Testing enthusiasm p89
to develop focus

Action planning tools Section 9, p91
to move forward

Set menus

Dealing with differences

Sacred cows p30
to determine interests and concerns

Opposing arguments p106
to get everyone's views on the table

Can't but can p105
to help with compromise

Taking the temperature p120
to check feelings and concerns

When there is no common vision

Hopes and fears p32
to identify concerns and interests

Situation target plan p56
to clarify perspectives

Brainstorming 'what is' p69
to create common view of the situation

Drawing our future p68
to create a target

Action planning tools Section 9, p91
or Storyboards p58
to create a plan

Decision making after brainstorming sessions

Raggedy start-up p26
or All who wander are not lost p36
to connect ideas

Framing tools p38
to focus ideas

Identifying parameters p42
to clarify limits

Ramifications wheel p61
to consider impact

Names in the circle p60
to consider support/opposition

Four hoops p78
to check for bias

Weighted voting p86
to select options

Understanding the realities for strategic planning

Forcefield analysis p48
or Strategy-based change p50
to analyse information

Medicine wheel p47
or Mind the gap p52
to focus on specific internal areas for improvement

Action Research p126
to create and evaluate action

Sharing information for decisions

All who wander are not lost p36
for reviewing decisions

Three-minute date p35
or Reporting back painlessly p12
for sharing ideas

Learning from stakeholders

Talking shop p23
to clarify internal relationships

Framing tools p38
to focus stakeholder feedback

Fishbowl p46
or Understanding each other thoroughly
p45
to listen to candid feedback and clarify questions

Action planning tools Section 9, p91

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<i>Taking the temperature</i>	<i>page 120</i>
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<i>Blue sky</i>	<i>page 67</i>
<i>Drawing our future</i>	<i>page 68</i>
<i>Making a commitment</i>	<i>page 97</i>

Learning about people & their values

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<i>Sticky wickets</i>	<i>page 33</i>
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<i>Why am I here?</i>	<i>page 27</i>
<i>Metaphor starter</i>	<i>page 34</i>
<i>Raggedy start-up</i>	<i>page 26</i>
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Determining the purpose and focus

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<i>Identifying parameters</i>	<i>page 42</i>
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Generating ideas and creative thinking

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Understanding the impact on others

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A la carte menu

Are we on the right track?

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Section 2

Starting meetings

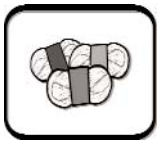
It is a universal truth that if people talk within the first five minutes of a meeting they are more likely to participate throughout. These ideas help people to move from their previous business to that of the meeting.

Process	Time (based on a group of 10)
Transition from one part of life to another This process helps people leave their previous business behind	15 mins
Talking shop Finding out about each other	20 mins
Rogues' gallery Useful when people are spending the day together and don't know each other	40 mins
Guess who? A good way for people who know each other to reintroduce themselves	30 mins
Raggedy start-up Useful when you think the group will not all arrive on time	15 mins
Why am I here? A simple way of explaining why you are in the room	20 mins
Who rode the elephant? A good way to learn something new about your colleagues	30 mins
Creating our history Works well at the start of a planning meeting	40 mins
Sacred cows What are they and do they matter?	20 mins
Packing my bags Useful when you are about to make changes and need to sort out what matters	20 mins
Hopes and fears A good way to check on expectations	20 mins
Sticky wickets This brings out into the open any irritations or problem behaviour that may interfere with a group working together well	20 mins
Metaphor starter A light-hearted way to get going	5 mins
Three-minute date A quick way to share ideas	30 mins
All who wander are not lost A way to move from one meeting to the next introducing new people into the discussion	10 mins

Transition from one part of life to another

This process helps people leave their previous business behind

15 mins



This is a really great way of starting a meeting, learned from Birgitt Williams. People are intrigued by what they see when they come into the room (objects or cards on the floor). Most importantly, if the question you ask is about what you are going to discuss, the exercise helps them leave their previous business behind and focus on the matter in hand.

You will need:

enough objects in the centre of the circle on the floor for everyone to have one each.

You could use:

- Balls of coloured wool
- Collection of postcards
- Stones
- Different coloured pens or pieces of paper
- Patterned scarves or bits of material

1 Put one set of objects in the centre of the circle.

2 Ask each person to take one object.

3 Ask them to look at the object and think, 'What does this tell me about...?'

4 After reflecting individually, ask them to share their thoughts with the person next to them and exchange their names if they don't know each other.

5 They then introduce each other to the group and, if appropriate, repeat what they were told.

Talking shop

Finding out about each other

Do this with the whole group (if it is too large then split it).

1 Ask them to think for a moment about the answers to these questions:

- What improvements have I seen in my job since I've been doing it?
- What would I still like to change?

2 Go round the group asking them to answer the questions; allow equal time for each person.

3 Discuss similarities and differences. If you have more than one group, exchange any significant similarities or differences that have emerged from this discussion.



Rogues' gallery

Useful when people are spending the day together and don't know each other



This longer exercise is a good way of starting a session where people are meeting for the first time or don't know each other very well.

People work on their own and then in small groups.

1 Give each person a worksheet like the one below and ask them to answer the questions.

1 My name (and picture if you have one)	2 What I am leaving behind to be at this meeting
3 What I find interesting about this session	4 Why I am here
5 What I am bringing to this meeting	6 What would help me contribute to this meeting

2 Ask them to work in groups of five. They go round the group answering the questions one by one (15 minutes).

3 Then the group uses the answers to write a summary of who is there (15 minutes).

4 Someone from each group summarises for the larger group. The individual check sheets are posted on the wall to form a rogues' gallery.

Guess who?

A good way for people who know each other to reintroduce themselves

You will need

- a worksheet for each person like this:

Two things I do very well
A personal motto or mantra
One thing I would like to be complimented on
Three individuals who have influenced me most
One thing I would change if I could
Two important goals for the next two years
One word that describes me



- 1 Each member of the group fills in the questions on this form and writes their name at the top.
- 2 The forms are then randomly exchanged and read out.
- 3 As each is read out the other group members see if they can guess the identity of the person.

Raggedy start-up

Useful when you think the group will not all arrive on time



Creating an activity for people to do as soon as they get into the room gets everyone connected quickly and positively.

There are two versions.

Version 1

You will need:

- Flipcharts
- Marker pens

Display flipcharts on which you have written different questions. As people arrive, give them a marker pen and ask them to go round the room and answer the questions and look at what other people have written.

If people don't know each other the questions might be things like this:

- Who are you?
- What job do you do?
- What do you hope to get out of this meeting?

Version 2

You will need:

- Pens
- A prepared sheet for each person like this:

Name (list the names of the people you expect to come and leave some spare lines for those you don't)	How you will remember me...	Something we agree about....

1 Give each person a sheet as they arrive.

2 Ask them to talk to as many people as they have time for before the main session starts, using the grid sheet. You can use bells to move people on so that everyone meets as many new people as possible.

Why am I here?

A simple way of explaining why you are in the room

This can be especially useful when community groups or volunteers are giving up their time to help your organisation.

You will need:

- Chairs in a circle

If it is a large group ask people to break into groups of five.

1 Ask each person to take a minute to think about their involvement in the project or the issue that is the focus of the meeting and why they are giving their time and effort.

2 People then take turns to introduce themselves and their involvement and motivation for giving their time to come to the meeting.

If it is a large group, ask the small groups to summarise who is there and introduce their different interests to the whole group.

Variation on this theme:

Surprises and skills

This is a similar process but participants are asked to think of some background experiences or skills that others may not know about them, but that might contribute to the project in some way.



Who rode the elephant?

A good way to learn something new about your colleagues



This is useful for a team or group who are going to work together for some time. It can bring out unknown qualities, values or experiences that might help the group in its work.

You will need:

- Chairs in a circle

If it is a large group ask people to break into groups of five.

1 Ask each person to take a minute to think about an experience or skill... anything significant that says something about them, that may not be known, but has shaped who they are and their contribution to the work of the group.

2 There are two ways to share the information:

i Group members take turns to introduce themselves and describe what they had been thinking about.

OR

ii Each person writes up their experience on a sheet of paper with no name. These sheets are posted and participants move around and read them. The group reconvenes and people try to guess who did what. At the end people identify their experience and relate it to how it may help them contribute to the group work.

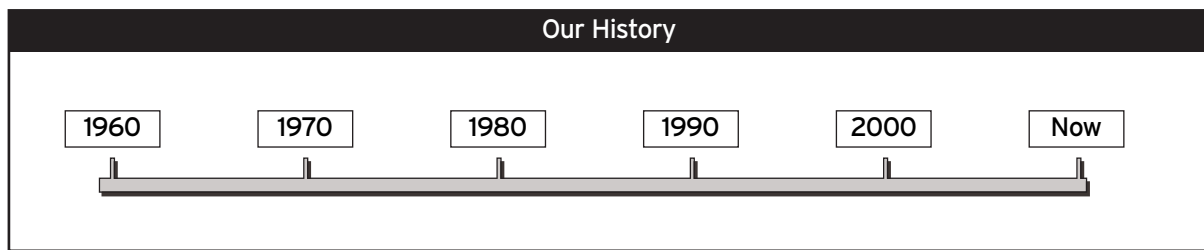
Creating our history

Works well at the start of a planning meeting

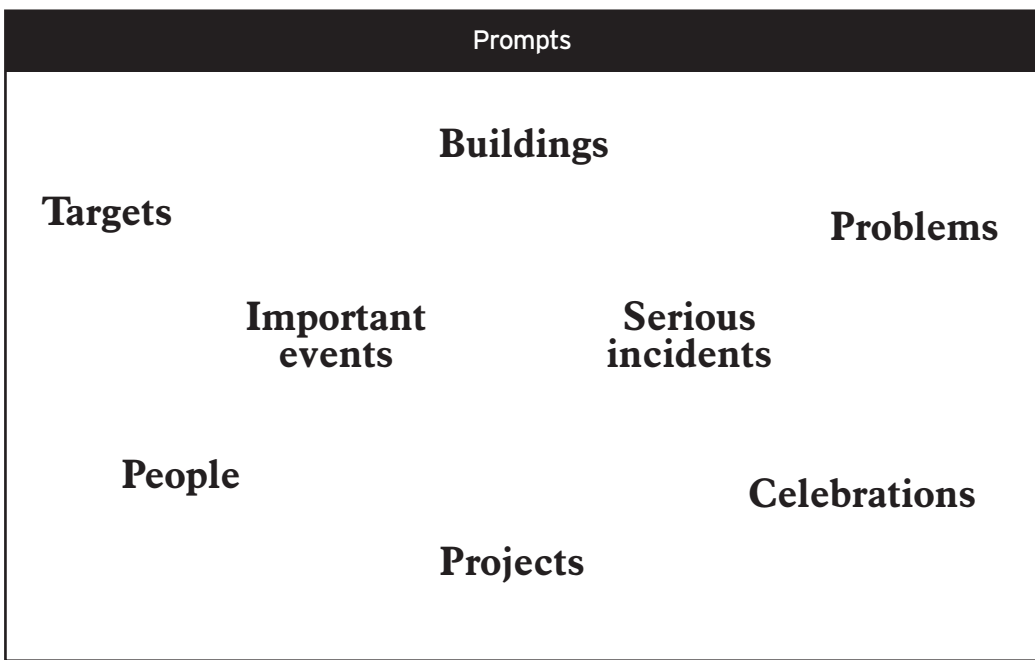
This is a good way to start a meeting when you are about to enter a new phase in the development of your work. It brings people together, draws on their individual and collective memory and produces a visual picture which can be shared.

You will need:

- Coloured pens
- You could also invite people to bring photographs or organisational memorabilia
- Use wall paper to create time-lines like this (one for each group):



- One flipchart in a place where everyone can see it like this:



- 1 Ask people to work in a group of up to eight.
- 2 Give each group a copy of the timeline.
- 3 Point out the prompts on the flipchart and ask them to use them to create a visual record of the history of their experience of the organisation.
- 4 When completed post them on the wall and invite the groups to look at each other's and see if they tell the same or similar stories.
- 5 In the whole group discuss similarities, differences and, most importantly, lessons to be learned from history.

40 mins



Sacred cows

What are they and do they matter?

20 mins



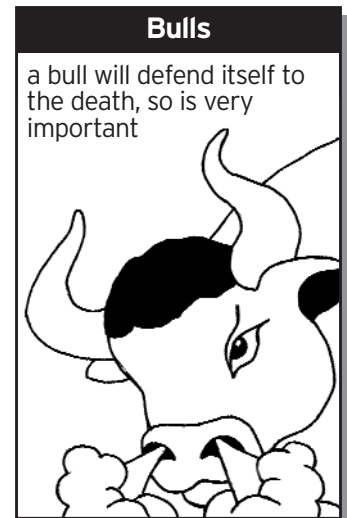
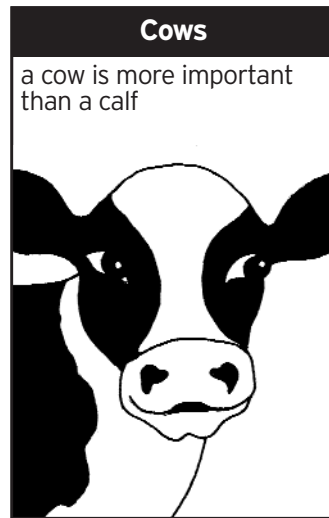
Sacred cows is a good-humoured starter that helps people to think about what is important and to understand each other's values.

It can be helpful when a group is dealing with change, when there is not a lot of conflict in the group, but where new ideas might inadvertently step on someone's toes. Sacred cows get symbolically parked at the door.

You will need:

- Flipchart paper
- Post-it notes
- Marker pens

1 Place three flipchart sheets on the wall near the door. Label or draw each one to represent:



2 Ask people to think about what might be a sacred cow for them in the discussion they are about to engage in.

3 Each person then writes their 'sacred cows' on Post-it notes in a way that everyone will understand what is meant and places them on one of the three flipcharts according to level of importance. If they see another Post-it note with the same item, they can group them together.

4 Everyone reads what has been posted to see what can be learned. This idea of leaving sacred cows to graze at the door, whilst being mindful of them, can help a functional group discuss difficult changes.

Packing my bags

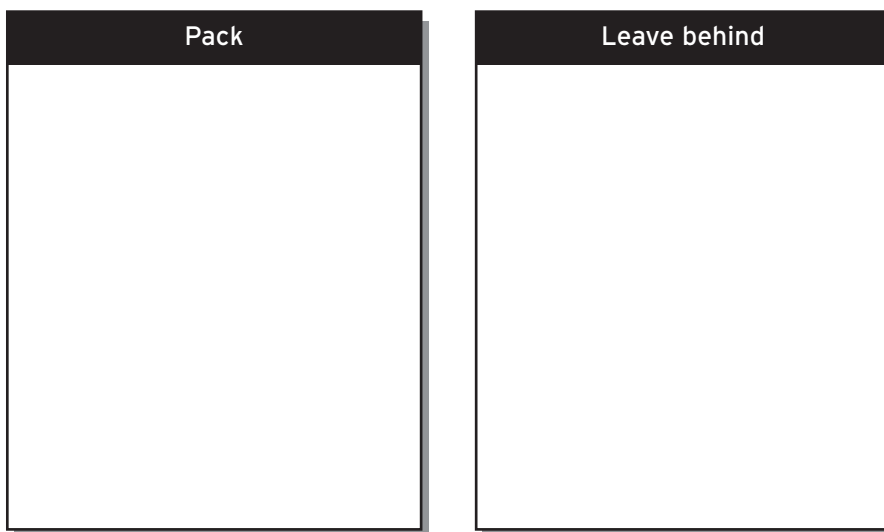
Useful when you are about to make changes and need to sort out what matters

When you are about to discuss change this can help identify what is and is not important to people in the current situation. Break into groups if there are more than 10 people.

You will need:

- Post-it notes in two colours
- Flipchart paper
- Pens

1 Tape two flipchart sheets to the wall and label them... **Pack** and **Leave behind**.



2 Everyone in the group takes Post-it notes in two different colours... for example blue notes are to Pack and pink are to Leave behind.

3 Play a little upbeat music and let people think about the two categories and write down as many ideas as they have for the things they want to take into the future and others they want to leave behind. They should write one issue on each Post-it note.

4 Go around the group and ask each person in turn to read out and place their issues on the appropriate flipchart. There is no discussion at this stage, just identification of the issues. If and when there are duplicate issues, people can group them together on the flipchart paper.

5 Each group then talks a bit about what the information means. If you have broken into smaller groups everyone can look at each other's issues on the wall or quickly share key ideas with the whole group.



Hopes and fears

A good way to check on expectations



This is a very useful recipe, particularly if you think people are suspicious or sceptical about what is going to happen next. It gives everyone an opportunity to think about what they want and don't want from the meeting and acts as a reference point during and at the end of the meeting.

You will need:

- Marker pens
- Flipchart paper drawn like this:

HOPES	FEARS

1 Ask people to break into small groups.

2 In their small groups share and record what they hope to get from the session and what they fear might happen (15 minutes).

3 Ask each group to tape their flipchart papers on the wall around the room and invite people to share particular highlights with the group if they want (5-10 minutes).

4 Promise to come back to this at the end of the meeting to check. You might say you'll try to bring their hopes to fruition, but accept some fears may also be realised.

Sticky wickets

This brings out into the open any irritations or problem behaviour that may interfere with a group working together well

If the group intends to work together over a period of time, and may have some tense times ahead, it is important that they identify potential group behaviour differences at the outset.

Sticky wickets is a chance to bring honesty and self-disclosure into the initial conversations of a group or new team. When later the group needs to talk about problems or annoyances it will be able to do so in a different way.

You will need:

- Marker pens
- Paper
- Flipchart

1 Each person silently lists the things that really bother them in working with a group (for example, lateness, one person dominating the discussion, side conversations).

2 Go round the group quickly and ask people to share their top priorities. Each person expresses their 'sticky wickets' and answers questions. This moves quickly.

This is particularly good to use with a board of directors, or governors, and the staff that work with the board. Sit the board members in the middle with staff around them in a circle. The facilitator records the sticky wickets on the flipchart and the staff listen and take notes. It can be useful to move on from this exercise to create a set of ground rules (see page 9)

20 mins



Metaphor starter

A light-hearted way to get going



5 mins



Playing with metaphors is a good starter that is quick and easy. Metaphors can create useful links and connections.

Choose the metaphors you are going to use. Food and cars are easy because most people have a general knowledge and an emotional reaction.

You will need:

- Marker pens
- Flipchart

1 Make a list of food or cars like this:

Cars	Food
Jaguar	Eclair
White van	Steak
VW Beetle	Caesar salad
Volvo Estate	Hamburger
Honda Civic	Muesli

2 Look at the agenda for your meeting and the issues you need to tackle.

3 Invite the group to choose different metaphors from the list (or make up their own) for the different items on the agenda.

Don't make a meal of this - do it quickly.

Three-minute date

A quick way to share ideas

This is based on the dating routine where people go from table to table in a café spending a few minutes with each other and then moving on. People talk fairly quickly and information is exchanged, assessments made, and decisions move forward. In this version people focus on a topic, they talk and then carry interesting ideas with them or leave them behind.

1 The group identifies a focus - it could be a problem or a new idea or an opportunity. It doesn't really matter except that the focus must be on something that matters to everyone.

2 Half the people in the group sit at tables. The others move from table to table. People meet with a partner for three minutes. They generate ideas about the selected topic. It can be anything, but everyone in the rotational cycle is talking about the same issue. People take notes on interesting ideas, concerns and new thoughts. They move on to the next person after three minutes.

3 Participants either get together as a full group or a series of smaller groups, and share any ideas or concerns even if they are not earth-shaking. Anything judged interesting can be developed at a later stage.

After this exercise, people have an idea of where they 'click' with others that they may not know well.

Knowledge Café (see page 130) is a similar but more developed approach to sharing information and building networks.



All who wander are not lost

A way to move from one meeting to the next introducing new people into the discussion



This is a good starter for a meeting that follows on from a previous one.

You will need:

- Marker pens
- Flipchart

At the end of the first meeting the group summarises key ideas, decisions, responsibilities, questions, and research to be undertaken onto flipcharts.

- 1 Post the flipcharts on the wall for the beginning of the next meeting.
- 2 Participants arrive and walk around chatting and reviewing the flipchart summaries.
- 3 Begin the meeting by bringing everyone up to speed through a two-minute summary followed by questions or comments.
- 4 The group then frames the current meeting's activities and starts.

Section 3

Clarifying and framing the meeting

It is important to clarify why the meeting has been called and the process and parameters of any decision making. These clarifying tools are often overlooked resulting in wasted time and, sometimes, serious unintended consequences.

Process	Time (based on a group of 10)
Framing tools Using one of these two approaches gets discussion off to a clear start	15 mins
Agreeing a definition An issue well defined can be a problem half-solved	30 mins
Decision-making grid This tool helps everyone know where the decision is going to be made	15 mins
Sphere of influence diagram This helps a group understand what it can change and what is outside its span of control	flexible
Identifying parameters A quick way to clarify the limits and constraints to planning	15 mins

Framing tools

Using one of these two approaches gets discussion off to a clear start

A square icon with rounded corners, a black border, and a sunburst pattern in the background. The text "15 mins" is centered in the square.

15 mins

1 Framing a question

It can help focus people's minds if the meeting is framed around a question. To try this approach, agree the general area that you intend to work on in the meeting and brainstorm until you find the question that expresses your purpose.

2 Framing an introduction

i Before an issue is opened for discussion in a group it can help if the person introducing the item 'frames' it by giving a brief overview with critical and relevant information such as:

- What?/Who?/Why?/When?
- Context and consequences (importance, impact, or other factors to consider).
- Need for the group's involvement and the relationship to their work.
- How ideas will be used and who is making the decision (see Decision-making grid, page 40).
- What outcome or product is expected from the session.

ii Once this information is shared, participants can ask quick questions as needed. Judgments and/or solutions should be withheld at this stage.

Framing should take no more than five minutes. If the item to be discussed is more complicated and very important, then a one-page briefing document could be prepared and distributed prior to the meeting.

Agreeing a definition

An issue well defined can be a problem half-solved

This is useful when members of your group come from different parts of the organisation or community, or have different interests, and you are not sure if they share an understanding of the issue.

You will need:

- Flipchart
- Paper
- Marker pens

- 1 Explain that everyone may have slightly different perspectives on the issue.
- 2 Ask each person to write down what they believe the issue or problem to be (three minutes) starting with the sentence with 'The issue is...'.
- 3 Share views on the flipchart and comment on differences in definition until you have found common ground.



Decision-making grid

This tool helps everyone know where the decision is going to be made

15 mins



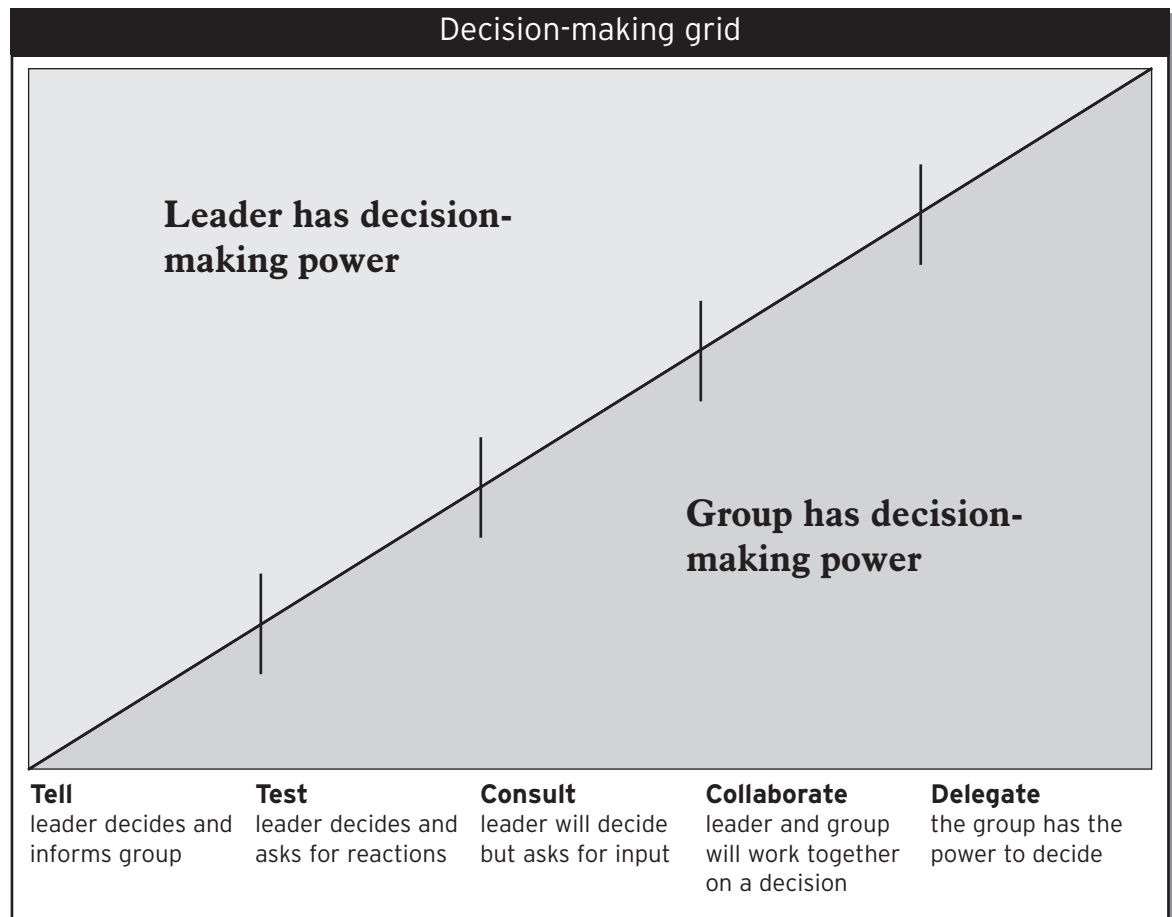
Everyone needs to know how their ideas and recommendations will be used. It may be that a manager will use people's ideas to inform their thinking when making a decision, for example, to see what staff reactions are to a new project. Alternatively the group can be empowered to decide and implement the project. It is always helpful to understand the status of the discussion, what it will be used to do, and who will make the final decision.

You will need:

- Flipchart

Decision-making grid

The decision-making grid is a useful tool to inform participants quickly on the decision-making process. It identifies five different options for decision making. Once a group is familiar with the grid, it is only necessary to say the word 'test' or 'delegate' to indicate the decision-making status of the discussion.



- 1 Draw diagram on a flipchart as above.
- 2 Explain the concept and the words that summarise the decision-making status of any discussion.
- 3 Discuss the decision-making status of the matter in hand.

Sphere of influence diagram

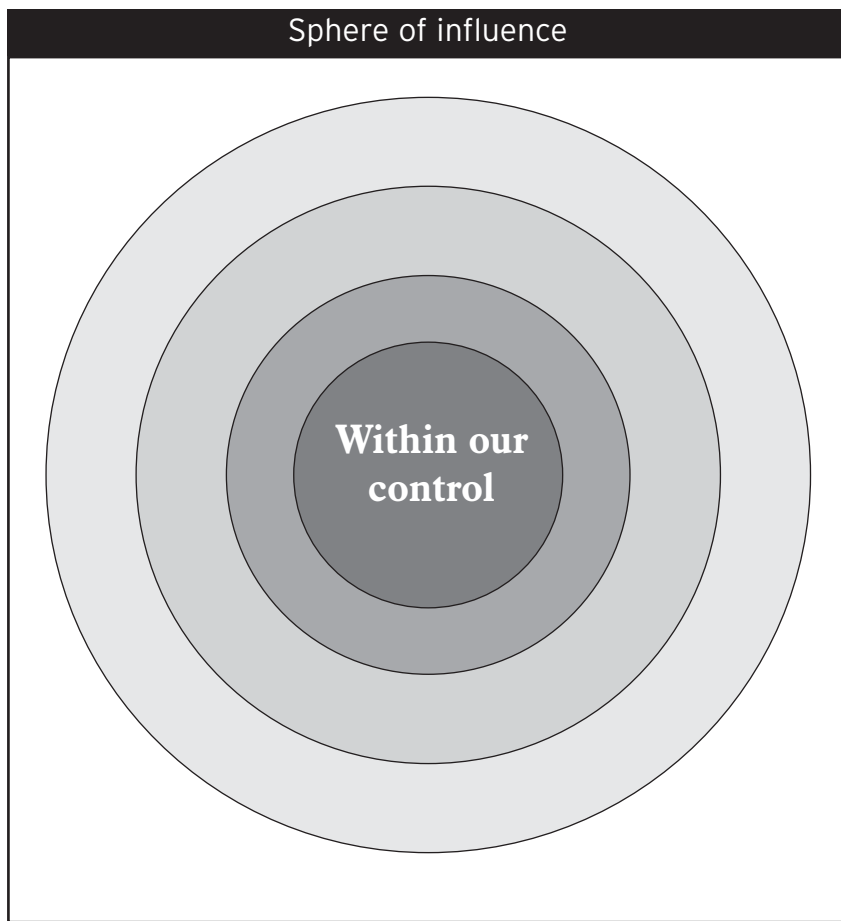
This helps a group understand what it can change and what is outside its span of control

It is not always necessary to use this tool, but when a group is attempting to make decisions in areas where it has no decision-making power, it is useful to redirect energy. This tool can be used as a visual aid for members to think about where they have influence.

You will need:

- Flipchart
- Marker pens

1 Draw large concentric circles in different colours on a flipchart like this:



2 Explain that the internal circle covers what can be directly influenced by the group. The next circle identifies secondary influences such as people or processes or resources that can be influenced by team-members indirectly such as a contact in another department. The largest circle, whilst possibly taking most discussion time, may be outside the influence of the group.

3 Ask the group, or small groups, to brainstorm what/who is in each circle for them, starting with the smallest and working outwards.

This process can be done quickly or at length.



Identifying parameters

A quick way to clarify the limits and constraints to planning

15 mins



Any planning group needs to understand if funds, space, personnel, time or any other critical factors are limited or if some ideas are absolutely 'off limits' (eg, relocating to the Bahamas). Knowing these things cuts down on wasted time and energy.

You will need:

- Flipchart
- Marker pens

1 Prepare a parameters template on a flipchart like this:

Parameters
Hard (non-negotiable)
Soft (negotiable)

2 Brainstorm the 'hard' issues, for example, resource and personnel limitations.

3 Brainstorm the 'soft' issues that are negotiable, possibly time, location.

4 Review briefly and clarify if necessary. This should be done in just a few minutes. Avoid justifications and long discussions.

Section 4

Gathering information

Process	Time (based on a group of 10)
<p>Who has a stake in our business? A mapping exercise to make sure that all relevant perspectives are included in discussions about change and development</p>	40 mins
<p>Understanding each other thoroughly A brilliant way of creating time to listen to your stakeholders and to check you understand what they are saying so you can then take it into account in your planning</p>	45 mins
<p>Fish bowl Another powerful way to listen to stakeholders</p>	60 mins
<p>Medicine wheel This is a non-judgmental way of diagnosing the health and balance of different elements within the organisation</p>	60 mins
<p>Forcefield analysis This helps a group to see the driving and restraining forces, so they are in a better position to determine which actions to take</p>	60 mins
<p>Mind maps This is a good way of developing a picture of all the issues and trends that you confront and how they connect with each other</p>	60 mins
<p>Strategy-based change An opportunity for structured reflection on the purpose and capacity of the organisation</p>	research
<p>On the horizon Understanding the major issues that could have an impact on strategic planning</p>	research
<p>Mind the gap A process for supporting complex change</p>	60 mins
<p>Storytelling It is said that each time a story is told three apples fall from heaven, one for the teller, one for the listener and one for the one who 'really hears'.</p>	flexible

Who has a stake in our business?

A mapping exercise to make sure that all relevant perspectives are included in discussions about change and development



You will need:

- Post-it notes
- Pens
- Flipchart like this:



1 If a large group, ask people to work in groups of five or six.

2 Ask people to write down as many different ideas of stakeholders (individuals, organisations, agencies) as they can think of, one per Post-it note.

3 Assign a piece of wall space to each group.

4 Ask them to take it in turns to read out their Post-it note and stick it on the wall.

5 Ask them to group the Post-it notes together and give each group a name.

6 Bring the whole group together and ask each group to call out the names of the groups of their stakeholders and record on the flipchart.

7 At this point you can:

- rate each stakeholder on how critical their interest in the discussion/development to be undertaken:
 - A** = involvement essential
 - B** = involvement desirable.
- discuss how different stakeholders can be included in the discussion/development.

Understanding each other thoroughly

A brilliant way of creating time to listen to your stakeholders and to check you understand what they are saying so you can then take it into account in your planning

This exercise follows naturally from the stakeholder analysis. Having identified who your key partners are it will be important to listen to what they have to say. They will need to be briefed and we suggest you ask them to speak for no more than 15 minutes on:

- the challenges of their situation
- the strengths and weaknesses of your organisation
- their view of what the organisation should do to change and improve.

You will need to be responsive to the needs of your visitors. They may come alone or with colleagues, they may want to make a visual or interactive presentation. However they choose to present their information, the following process should work.

You will need:

- Room set out with a 'top table' for your guest stakeholders
- everyone else sits in groups with flipcharts

1 Ask stakeholder/partner to make their presentation.

2 Ask each group to consider what they have heard and on the flipchart record:

- What were the main messages?
- How do we react to what was said?
- Is there anything we don't understand - if yes, what?

3 Groups then put their points to the stakeholder panel and discuss their shared and different points of view.

45 mins



Fish bowl

Another powerful way to listen to stakeholders

A square icon with rounded corners, a black border, and a sunburst pattern in the background. The text "60 mins" is centered in the square.

60 mins

Prior to the meeting, stakeholders will need to be identified and briefed. They will be asked to think about certain aspects of their work with you. It may be evaluative or based on specific questions. For example:

- the challenges of their situation
- the strengths and weaknesses of your organisation
- their view of what the organisation should do to change and improve
- what works and what needs to change.

You will need:

A large room with chairs set up in two concentric circles. The internal circle is for stakeholders and a facilitator. Listeners from your organisation sit in the outside circle.

1 The stakeholders are asked questions by the facilitator and comment, as in an informal focus group. The discussion is free-flowing but the facilitator ensures balanced participation and focus. The outer group takes notes and listens.

2 After this discussion has come to an end, the circle is enlarged and everyone sits in one large circle.

3 Listeners clarify the key points they have heard and ask questions that might lead to improved practice. The facilitator makes sure no one in the organisation rebukes the stakeholder or is defensive.

4 Stakeholders leave and the listeners re-group to review what was learned and how it can be used.

A number of different fish bowl groups can take place at the same time. Multiple fish bowls are best done in break-out rooms because it can become quite noisy. At the end of all the sessions, listeners gather together and brief each other on the key points made by different stakeholder groups.

5 After gathering information from stakeholders, the group can develop their plans informed by what they have heard.

Medicine wheel

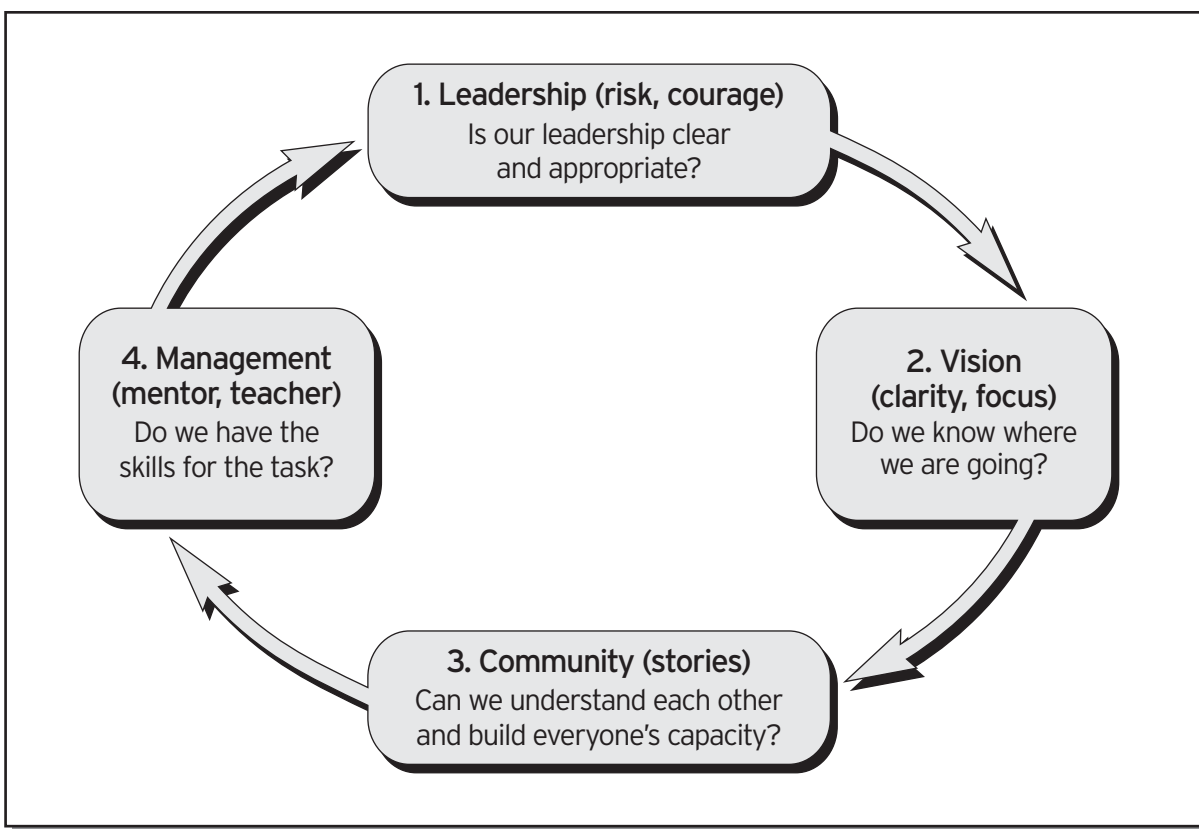
This is a non-judgmental way of diagnosing the health and balance of different elements within the organisation

For maximum performance and integrity the four elements (leadership, vision, community and management) should be in balance.

You will need:

- Chairs in a circle
- Flip chart paper
- Sticky dots
- Marker pens

1 Draw this on a flipchart:



2 Give people four dots.

3 Ask them to stick them where they think the strengths of the organisation lie.

4 As a group discuss the causes of the strengths and the responses needed to resolve weaknesses.

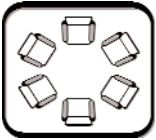
5 Create an action plan with names and dates against each task.



Forcefield analysis

This helps a group to see the driving and restraining forces, so they are in a better position to determine which actions to take

60 mins

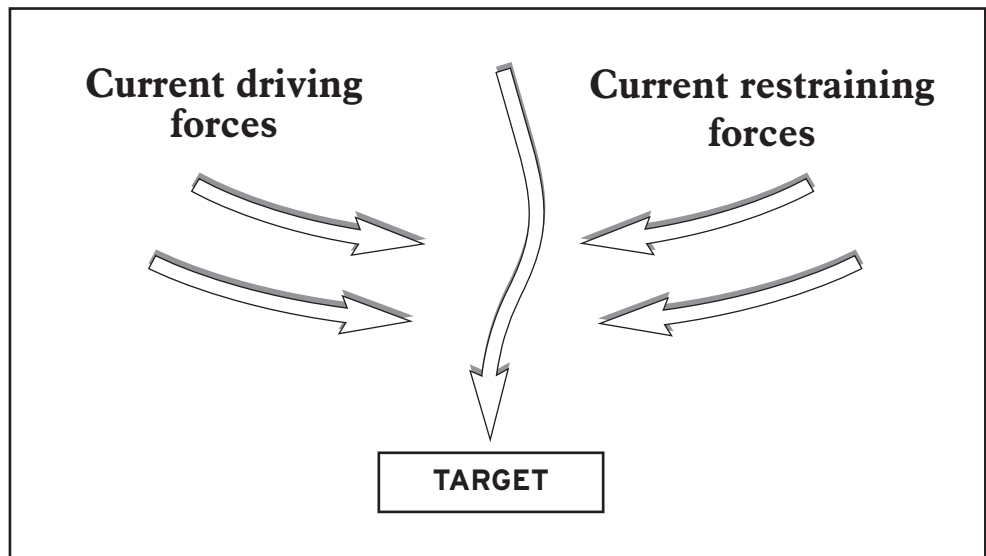


You will need:

- Chairs in a circle
- Packets of Post-it notes and pens (if silent brainstorming)
- Flipchart
- Marker pens

1 Identify the issue.

2 Prepare a flipchart like this:



3 Brainstorm and record the restraining and driving forces that have an impact on your target.

4 Analyse these forces in turn. Look at your list and determine which forces are the most critical to attack. Discuss what you can do to strengthen driving forces and weaken restrainers.

5 Create an action plan based on your ideas with names against tasks and deadlines.

6 Double-check that the original idea/target is still what you want to do.

Mind maps

This is a good way of developing a picture of all the issues and trends that you confront and how they connect with each other

Developed by Tony Buzan, mind maps demonstrate the complexities, or muddles, in which most of us operate.

You will need:

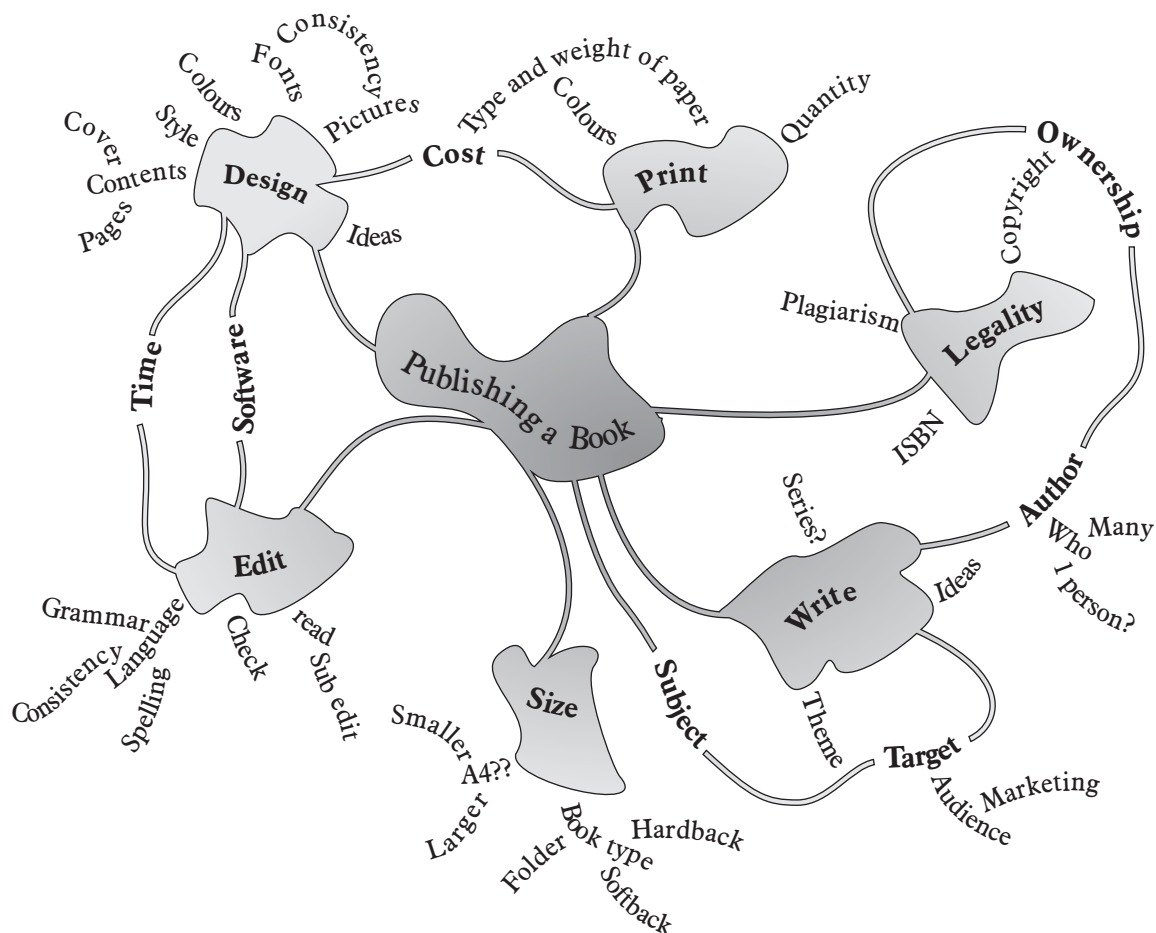
- The map (two strips of wallpaper stuck together, approx. 12x6 foot for a group of up to 60 people)
- Chairs in rows in front of the map
- Marker pens
- Sticky dots

1 Write the theme of your mind map in a circle in the middle of the paper (for example, a picture of our situation in which we want to be the best service provider locally).

2 Ask people to brainstorm/shout out the issues, trends and events that should be on the map.

3 If they think it is a new issue or trend or event then it is drawn connected directly to the circle at the centre, if not they say the line that is already on the map to which it connects. (Links between trends can be shown by dotted lines.)

4 When the map is finished you can give people three sticky dots to identify the key issues for further work.



60 mins



Strategy-based change

An opportunity for structured reflection on the purpose and capacity of the organisation



Before you start to create your next plan for the future it might be useful to spend some time on reflection. This exercise works by breaking into small research groups that report their findings back to the whole team to work on together.

1 Ask people to choose to work on the following questions in one of four groups:

Strategic intent/purpose

- What is the essence of the work we do?
- Why are we doing the work?
- What is our mission, values?
- Why do we want to learn for the future?

Core competencies/skills

- What skills do we need to build our future, given where we are now?
- What do we need to learn?

Competitive position/research and evaluation

- Who do we serve?
- What do they need?
- What will they need?
- How will we know?
- How will we compete?
- How will we know how well we are doing?

Scenario thinking/planning

- What are the likely futures we may face?
- How can we think creatively about planning?
- How can we remain flexible in our responses?
- 'What if...?'

2 Each group works on strategies for each of these aspects of the organisation's development.

3 They report back with capacity-building recommendations that the group can look at and then determine how to take forward.

On the horizon

Understanding the major issues that could have an impact on strategic planning

This exercise should help answer the questions:

- What are the critical unknowns?
- What do we know about the accuracy of the assumptions we are making?
- What factors are influencing these trends and patterns?
- What factors must be considered?

You will need:

- Access to internet
- Resources that provide information and different viewpoints about your business and:
 - society at large
 - markets and funding
 - business in general
- Flipchart

1 Assign team members to two research teams. One will look for threats, the other for opportunities. Both will look for major trends and patterns that the organisation should be thinking about. The groups will research, read articles, talk with each other and reconvene in their group to create a report about what they learned. Each group will identify key trends and patterns. They will prepare a summary on flipchart paper and present to the other group.

2 After considering the information presented, the full group discusses findings, examines sources, determines questions and any further research that is needed.



Mind the gap

A process for supporting complex change



Groups often need to deal with challenging situations where change is desirable, necessary or just unavoidable. Sometimes teams explore great ideas and make thoughtful decisions only to find that they don't have the capacity to translate them into action. This is frequently because a necessary piece of infrastructure support is missing or has been forgotten.

This tool provides a practical scan of your work environment to see what you have in place and what 'gaps' could threaten implementation. It can pin-point where to do the initial groundwork to avoid potential barriers and resistance within or outside the organisation.

You will need:

- Worksheet

1 Assemble the right team. Ask them to look at this grid:

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= CHANGE
---------------	---------------	-------------------	------------------	--------------------	-----------------

2 Ask them to think team by team through the organisation and analyse their capacity from vision to resources on the grid to test if they have everything they need to create a realistic action plan. For example, if it is clear that one essential department has no incentives for supporting the project how will their support be engaged? What is needed? What support from which key people will move this forward? Who needs to contact whom?

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= CONFUSION
---------------	---------------	-------------------	------------------	--------------------	--------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= ANXIETY
---------------	---------------	-------------------	------------------	--------------------	------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= HOSTILITY
---------------	---------------	-------------------	------------------	--------------------	--------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= DISILLUSIONMENT
---------------	---------------	-------------------	------------------	--------------------	--------------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= FITS & STARTS
---------------	---------------	-------------------	------------------	--------------------	----------------------------

3 Ask the group to pull together all the gaps and develop an action plan.

Storytelling

Powerful stories draw on the past to unlock the future

It is said that each time a story is told three apples fall from heaven, one for the teller, one for the listener and one for the one who 'really hears'.

Storytelling sessions have many purposes. At the most simple, they bring people together. Storytelling can also help a group discern different and common patterns in their work. Powerful stories inspire groups to action. Storytelling can help heal and transform conflict. Storytelling plays a creative part in building teams. Each one of us has a story to tell.

- 1** To use storytelling to better understand a particular issue or situation, first of all, identify the topic clearly.
- 2** A prompt question can help people start the process. You may want to explore how you arrived at where you are, for example *'How did we create our situation?'* or generate positive memories from the past, for example *'When were we most alive and successful as a team?'*
- 3** Invite people to listen as wholeheartedly and uncritically as possible and to look for insights and connections between different stories.
- 4** Give people time to think before going around the group and asking people to tell their story.
- 5** Spend time discussing and synthesising what has been learned from the different stories before exploring what they suggest for future action.



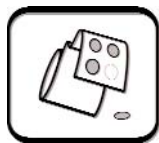
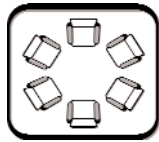
Section 5

Analysing your situation

Process	Time (based on a group of 10)
<p>Situation target plan (STP) This helps a group determine where they are, where they want to go and how to get there</p>	60 mins
<p>SWOT analysis This classic tool helps close the gap between where you are now and where you want to be</p>	40 mins
<p>Storyboards This very useful process breaks a problem down into its component pieces</p>	40 mins
<p>Small steps to heaven This takes a group through a staged discussion from moaning about everything that is wrong to putting their vision into practice</p>	90 mins
<p>Names in the circle A way of working out the relative importance of different people to moving an issue forward</p>	30 mins
<p>Ramifications wheel This tool helps people think about the impact of their ideas on other groups and individuals</p>	40 mins
<p>Spider diagram A visual analysis that evaluates individual and team performance</p>	40 mins
<p>Glad, sad and mad An excellent way of analysing performance and getting a better understanding of the frustrations that get in the way</p>	45 mins
<p>Pie chart A visual way of expressing the difference between where you are now and where you want to be. This works well with specific issues like use of time or money</p>	30 mins

Situation target plan (STP)

This helps a group determine where they are, where they want to go and how to get there



Teams often start to plan without looking at their current situation or fully agreeing to their new goals. This process insists on the communication of key ingredients and so avoids a common cause of conflict later on.

You will need:

- Chairs in a circle
- Flipchart
- Paper
- Marker pens
- Sticky dots

1 Define the issue that you are working on and write on a flipchart.

2 Situation

Write 'What is our situation?' on the flipchart. Brainstorm and write down answers to this question. Include positives and negatives. Examine available data. Search out assumptions and differences. This conversation should aim to build up a general picture of how different group members understand the situation as it is NOW. Make sure everyone shares the same picture before you move on to the next stage.

What is our situation?

3 Target

Write 'What is our target?' on another piece of flipchart paper. Generate as many ideas as possible about what people in the group want. What would it look like? How would it work? How would it be different from the current situation? When everyone's ideas are exhausted and written on the flipchart, create priorities using dots (see Three dots each, page 84). Once you have identified a clear target, look at the connections between it and your current situation. *Targets are not a means to an end in themselves.* You now need to move on to formulating proposals.

What is our target?

4 Proposal

Write 'What are our proposals?' on another piece of flipchart paper. Discuss what the group needs to do to move from the current situation to their target. What ideas have the greatest possibility of success? Record on the flipchart all ideas, processes, plans and strategies. (You may want to stop at this point and continue another time if the situation is complex and needs more thought.) If the decision has impact on other parts of the organisation, use the Ramifications wheel (see page 61) and determine who you must involve and inform.

What are our proposals?

5 Next work together to create an action plan (see page 93) from the proposals, assigning tasks, deadlines and resources.

SWOT analysis

This classic tool helps to close the gap between where you are now and where you want to be

You will need:

- Chairs in a circle
- Packets of Post-it notes and pens (if silent brainstorming)
- Flipchart paper
- Marker pens
- Sticky dots (if prioritising)

1 Draw a chart on a flipchart like this:

SWOT issue	
Strengths	Weaknesses
Internal	
Opportunities	Threats
External	

2 Start by looking at the external opportunities and threats.

3 Brainstorm and record views in the boxes. Be as specific as possible.

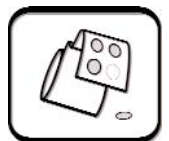
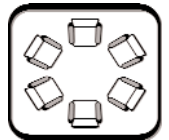
4 Discuss and record the causes of internal strengths and weaknesses. Make sure they are fully understood.

5 Discuss the response required to opportunities and threats.

6 Focus on what organisational strengths and activities can enhance opportunities while reducing threats.

7 Create an action plan with names and dates against each task.

40 mins



Storyboards

This very useful process breaks a problem down into its component pieces



You will need:

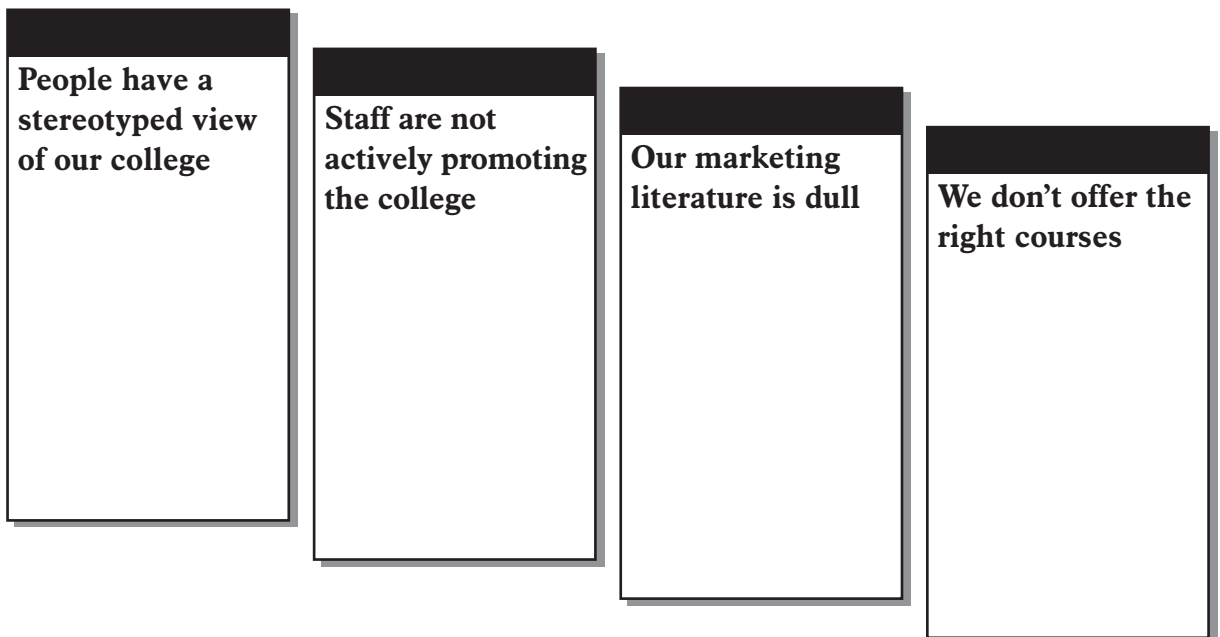
- Flipchart
- Marker pens
- Post-it notes

1 Agree the problem that the group is confronting.

2 Ask the group to break the problem down into its component pieces. Put each on a flipchart and display around the room. For example if the problem was:

We are not attracting enough students

then some of the flipcharts might look like these:



3 Ask the group to divide and stand in front of one part of the storyboard.

4 Ask each small group to write solutions on Post-it notes, one per note, and post on the flipchart.

5 After a couple of minutes the groups move on to the next flipchart.

6 When all groups have visited all parts of the problem, group the Post-it notes and summarise solutions.

7 Write the solutions onto a further flipchart and see if you have moved solving the problem forward.

Small steps to heaven

This takes a group through a staged discussion from moaning about everything that is wrong to putting their vision into practice

Before using this process clarify any limitations and constraints (see Identifying parameters, page 42) so that people's ideas are achievable. If you don't do this you'll raise unrealistic expectations and things will get worse.

You will need:

- Flipcharts
- Pens

- 1** Ask the group to brainstorm everything that frustrates and irritates them and makes their job more difficult to do well.
- 2** Ask them to divide into groups of four or five.
- 3** Ask them to share their ideas and **agree a vision** for the team (or the organisation) they want to build. They should work on this for about 15 to 20 minutes and express it in writing to share with others later.
- 4** Then ask them to work out what **resources** they would need to make this vision real. These should be listed on their flipchart.
- 5** The group should then identify the **first three steps** that need to be taken to move forward towards the vision. These actions are listed on a further flipchart.
- 6** Each group pastes their flipchart to the wall and people walk around looking at each other's ideas.
- 7** The reporter from each group then meets to converge the ideas from the different groups and produce a report for the whole group to consider at their next meeting.

90 mins



Names in the circle

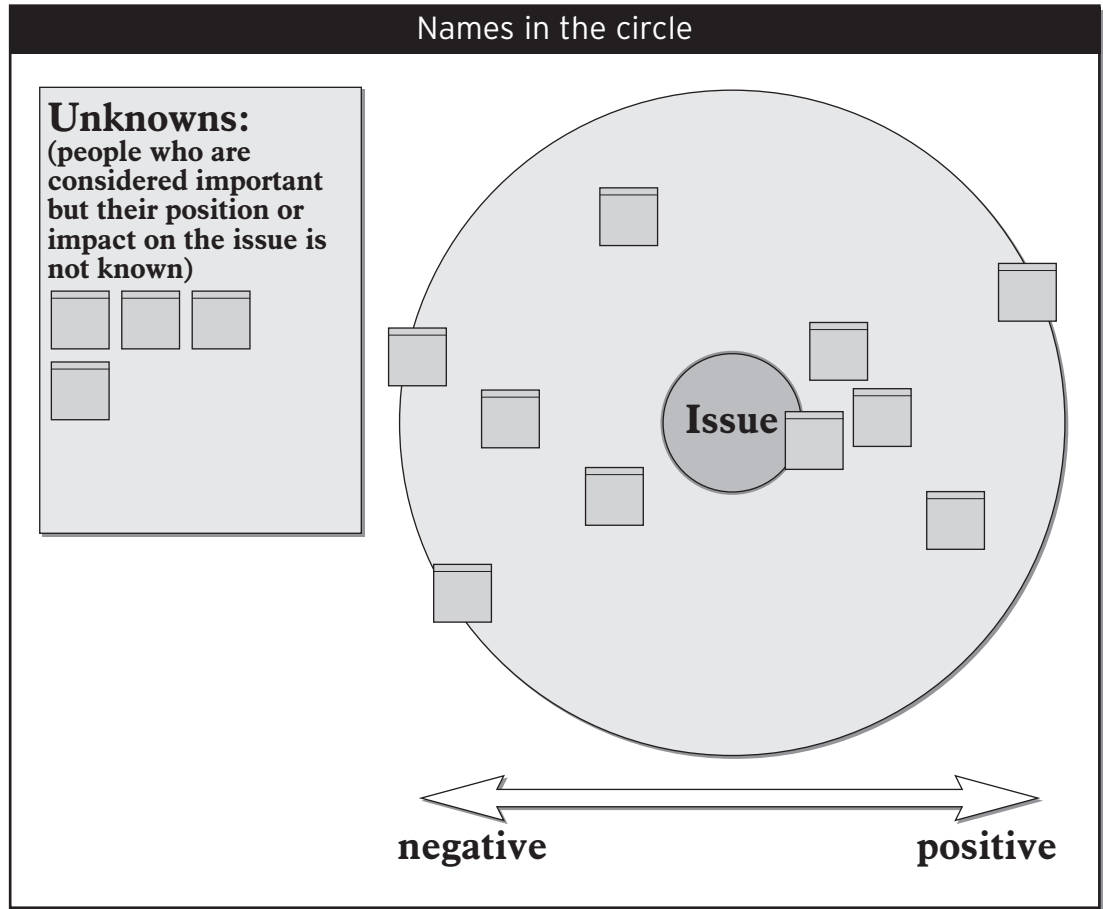
A way of working out the relative importance of different people to moving an issue forward

30 mins



You will need:

- Post-it notes and pens
- A flipchart with a circle drawn on it like this:



1 Write the topic, issue, problem in the centre of the circle.

2 Ask people to write on Post-it notes the names/departments/agencies of those who will have a positive or negative impact on the project. Write one per Post-it note.

3 Place the Post-it notes on the circle in proximity to the problem - close to the centre means they are critically important, at the edge they may have little role to play.

4 You can indicate the name's positive and negative impact by placing the Post-it on the left if the impact is likely to be negative and on the right if it is positive.

Once all the names are identified and placed in the circle, discuss the implications and potential actions to be taken. Does this change the activity or decision? Does the problem take on a different level of importance? Who are the important unknowns? How do we find out?

Ramifications wheel

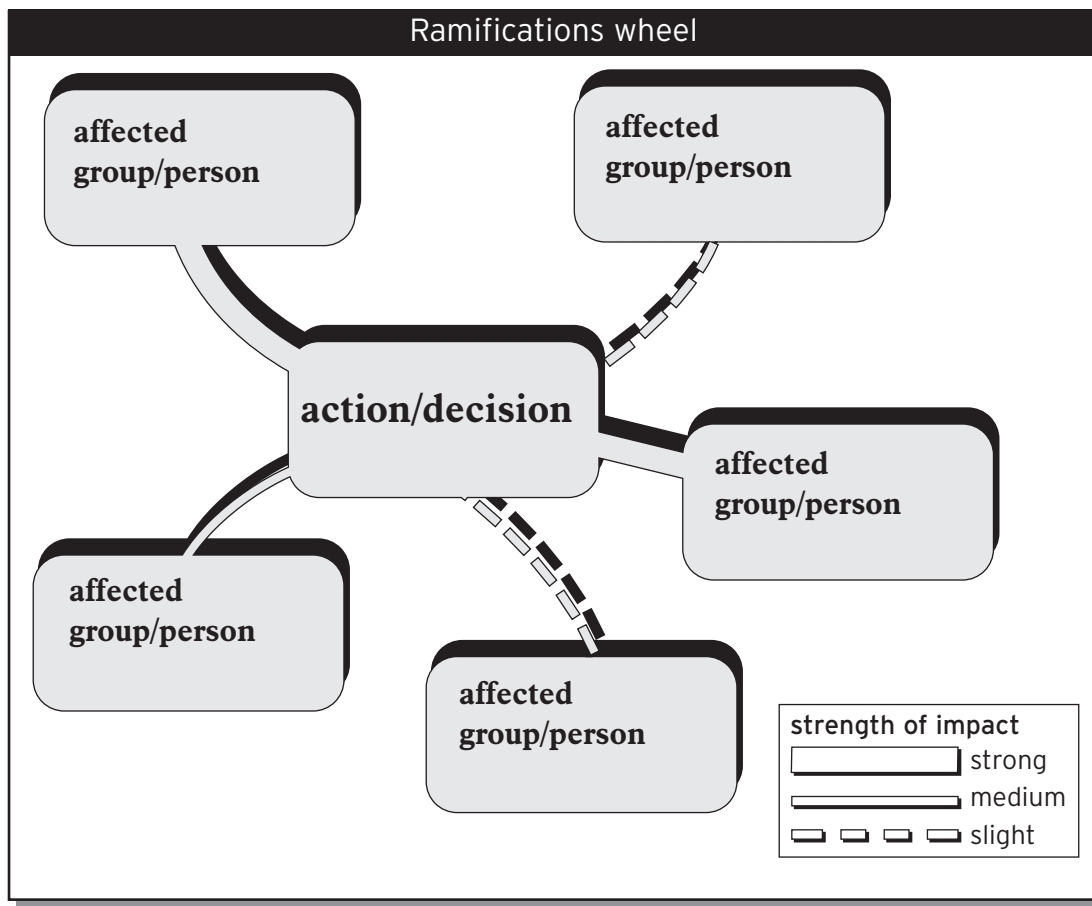
This tool helps people think about the impact of their ideas on other groups and individuals

This process helps to identify strong and weak connections between key people or groups in relation to an action that might be taken. It also points out areas where the effect is unknown and may require exploration. The tool is particularly useful when the group risks acting hastily.

You will need:

- Flipchart
- Pens

1 Write down the action or the decision on a flipchart as below. Brainstorm the key people/groups who will be affected. Indicate the strength of the impact upon them by drawing a bold or medium or dotted line:



2 Brainstorm the positive, negative, neutral and unknown consequences for each group or individual.

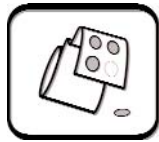
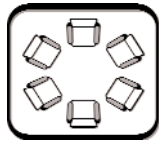
3 As you do this, plan the steps you will take to deal with impact.

4 Check you still want to proceed with the decision.



Spider diagram

A visual analysis that evaluates individual and team performance



Spider diagrams enable a group to get a picture of their individual and collective progress against a number of factors simultaneously. They encourage people to discuss how things are going from different perspectives without having to defend their position or fear attack.

You will need:

- Chairs in a circle
- Flipchart paper
- Marker pens
- Sticky dots

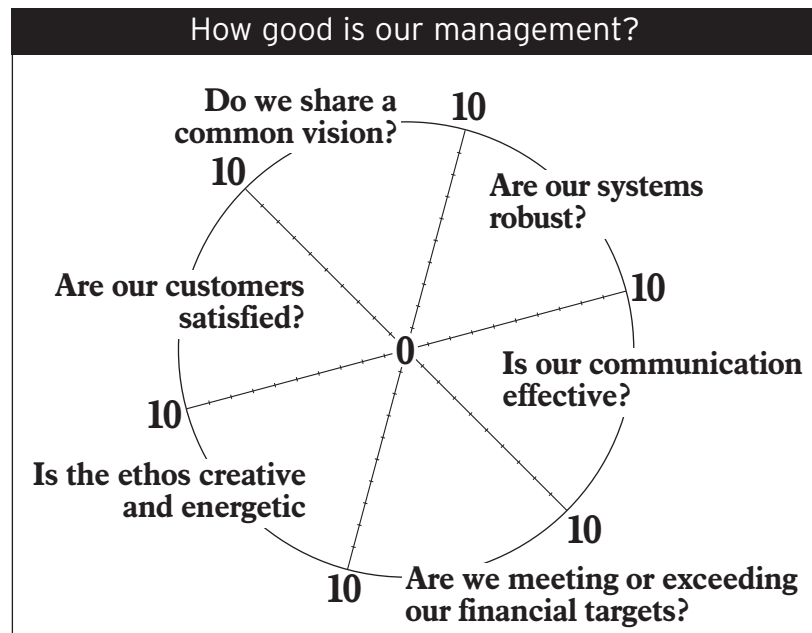
1 Identify what is to be measured. If the factors are not agreed then the affinity grouping process (see Page 71) is good for this.

2 Draw a large circle on a flipchart and divide into as many segments as you have identified factors to be measured.

3 Write the factors on the outside of the circle against each segment.

4 Write the number 0 in the centre of the circle and 10 at the outer edge.

This is an example; a template of the diagram is on page 146



5 Team members each have a copy of the template and place a mark assessing their strength^(o)/weakness^(o) (10-0) in each segment that reflects *their own* performance.

6 The next step involves all team members. Each person copies their marks by placing sticky dots onto the flipchart (strengths near the edge or weaknesses near the centre). The strengths and weaknesses of the team can be seen at a glance.

7 The group can now look at the picture and discuss what it tells them.

8 Once the group has reached some consensus they can identify activities to focus energy in areas that are weak.

Glad, sad and mad

A good way of analysing performance and getting a better understanding of the frustrations that get in the way

You will need:

- Flipchart
- Scissors
- Masking tape
- Two colours of sticky dots

1 Decide the issue that is to be analysed, for example, the performance of the team. Make sure everyone is clear about the question.

2 Ask people to divide into groups if there are more than 10 people. (Grouping people for this exercise may take some thought if there are tensions in the team.) Each group will need a reporter.

3 Give each group a flipchart like this:

GLAD	SAD	MAD

4 Ask them to brainstorm under the different headings on the chart. Explain that the category 'mad' is something that is so 'sad' it is driving them crazy.

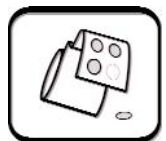
5 Ask the reporters from each group to get together and converge their issues either by creating a new flipchart record or by cutting and pasting them together.

6 Put the converged flipchart on the wall.

7 Give each person three red dots (things they want to change) and three green dots (things they want to build on).

8 The dots give everyone a visual sense of what matters most for the next stage of planning.

45 mins



Pie chart

A visual way of expressing the difference between where you are now and where you want to be. This works well with specific issues like use of time or money.

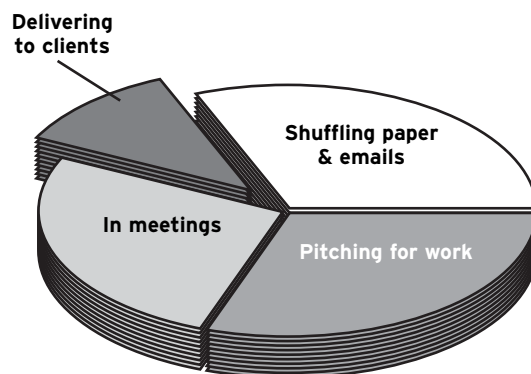


You will need:

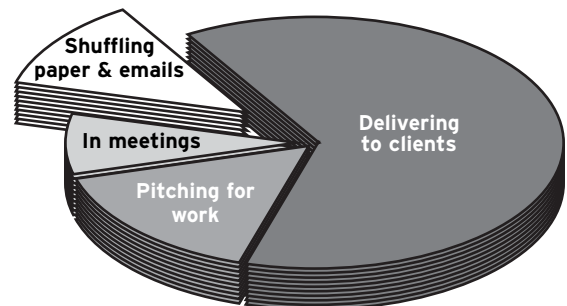
- Flipchart
- Marker pens

- 1 The group defines the issue that needs to be examined.
- 2 They list the component parts of the issue.
- 3 A circle is drawn on the flipchart.
- 4 This is then divided into segments; the size of each segment reflects what the group agree is the amount of time or attention paid to that component part.
- 5 A further circle is then drawn.
- 6 The group agrees how it would like the situation to be.
- 7 They define the obstacles and what can be done for them to be overcome.

For example:



How I spend my time



How I want to spend my time

Section 6

Sharing ideas

Process	Time (based on a group of 10)
Simple group process A very simple and useful way of encouraging everyone to join in and express their ideas	40 mins
Blue sky Blue sky time is when ideas roam free	flexible
Drawing our future A way to help people think imaginatively about the future	60 mins
Brainstorming Two ways of using this classic approach to creative thinking	15 mins
Negative brainstorming This is not only good fun but often provides insights into where the best-laid plans can go wrong	15 mins
Affinity grouping This is a way of generating a lot of ideas, organising them and seeing where there is common ground and where there is not	30 mins
Edward De Bono's six hats Looking at life from different perspectives	45 mins
Solving other people's problems Two simple ways of getting help	40 mins

Simple group process

A very simple and useful way of encouraging everyone to join in and express their ideas



This process, whilst being one of the simplest, is also one of the best.

You will need:

- Flipchart
- Marker pens

1 Ask the group to come up with ideas by taking a few minutes to write down their thoughts individually in silence.

2 Go around the group; each person in turn says one of their ideas. These are written on a flipchart.

3 After all the ideas have been generated, the group discusses connections and differences.

4 Participants then determine which ideas to explore further.

The benefits of this process are immense. First it keeps talkative people from dominating discussions; it allows quiet, thoughtful people some time to draw their thinking into a useable form; it keeps the group from only discussing one idea whilst other good ones are not expressed. It links some thoughts to others and identifies divergent thinking as well.

Blue sky

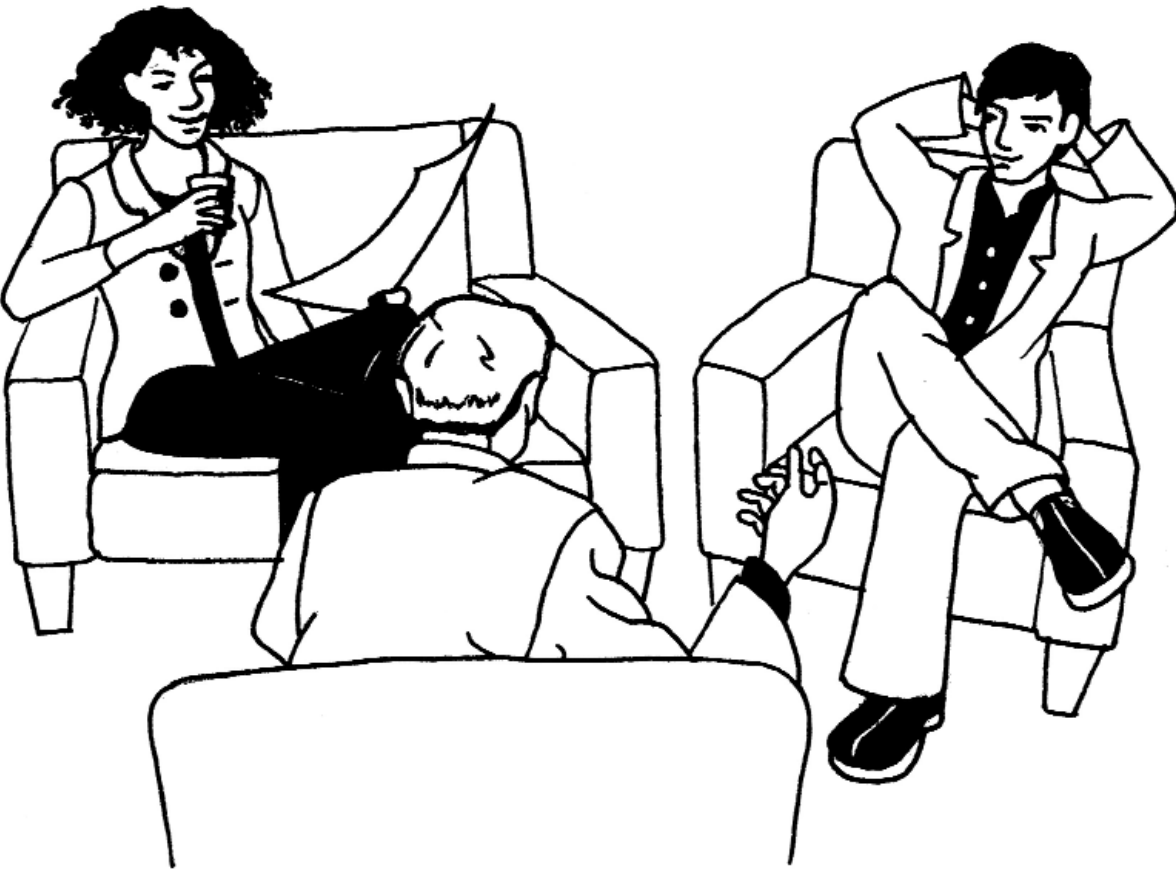
Blue sky time is when ideas roam free

Often this needs no process other than people sitting together in a relaxed way.

If you need a catalyst you can use Martin Luther King's wonderful sentence 'I have a dream'.

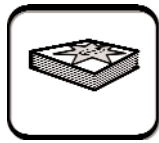
Or you can use photographs as prompts.

Or music ...



Drawing our future

A way to help people think imaginatively about the future



You will need:

- Very large pieces of paper
- Coloured pens
- Old magazines
- Paper
- Photographs

1 Ask people to divide into groups of three (or work on their own if they prefer).

2 Ask each group to work together to draw a picture or create a collage that illustrates how they see their *current situation*.

3 Then ask them to make another picture of *how they would like things to be* in three to five years' time.

4 Ask people to walk around and look at each other's pictures.

5 Identify and discuss the common themes of 'now'.

6 Identify and discuss the common themes of 'in three to five years' time'.

This is a great exercise to do when people are coming together to start a new project or planning process.

Brainstorming

Two ways of using this classic approach to creative thinking

You will need:

- Post-it notes and pens (for silent brainstorming)
- Flipchart
- Marker pens

1 Define the issue that needs to be explored and write it on a flipchart.

2 Explain the ground rules:

- Encourage creative ideas and thinking 'outside the box'.
- Hold back on evaluation and criticism until all the ideas are shared.
- Remember a brainstorm is not decision-making, just a first step in moving towards a decision.
- Go for quantity rather than quality of ideas.

3 Decide which brainstorming techniques to use:

Silent - group members take a few minutes to write their ideas on a Post-it* note. They then take it in turns to go round reading one idea at a time as they place the Post-it note on the flipchart. When someone has run out of Post-it notes they pass to the next person.

OR

Noisy and unstructured - the group call out their ideas and a note-taker records them on a flipchart.

4 Brainstorm until all ideas are exhausted.

* The advantage of using Post-it notes (or pre-sprayed sticky wallpaper) is that the pace of collection of ideas is not governed by the speed of the recorder's writing.



Negative brainstorming

This is not only good fun but often provides insights into where the best-laid plans can go wrong

15 mins



You will need:

- Flipchart
- Pens

1 Agree the topic - for example, our development plan.

2 Write on the flipchart:

How can we make sure our
development plan fails?

3 Brainstorm ideas and write on flipchart.

4 Prioritise the issues that are most threatening and discuss and decide any actions that need to be taken.

Affinity grouping

This is a way of generating a lot of ideas and organising them to point the way forward

You will need:

- Post-it notes
- Flipchart paper
- Marker pens
- A4 paper
- Masking tape

1 Define the issue that is to be discussed and write it on the flipchart - for example, 'What are our key targets for this year?'

2 Divide into groups of six.

3 Each group silently brainstorms (see page 69) onto Post-it notes. Ideas should be succinct, yet long enough to be understood.

4 Each group then finds a clear piece of wall.

5 Each person in a group reads out one of their ideas in turn and sticks the Post-it note on the wall in **no order**. This continues until all the ideas from everyone in the group are on the wall.

6 In **silence** the group now sorts these ideas into clusters of similar issues by moving the Post-it notes until they are all grouped in a way that satisfies everyone. Make sure that everyone joins in this task, not just the dominating members of the group. Post-it notes may be moved by any group member and several times.

7 When the Post-it notes are sorted into clusters, participants discuss the elements of each grouping of Post-it note ideas and give it a name that expresses the totality of ideas and issues. The name should be written in marker pen on a piece of A4 and stuck next to the associated group of Post-it notes.

8 The whole group then reconvenes. Individuals from each group take it in turn to introduce the named themes that have emerged. It is likely that many will be common to several groups.

9 The themes will provide some clarity and point to the way forward. If the group wants to discover what themes are the most important then do a prioritising exercise (see section 8, page 83).



Edward De Bono's six hats

Looking at life from different perspectives



45 mins



This exercise makes you look at, and challenge, ideas and issues from different points of view.

The six hats represent six modes of thinking and are *directions to think* rather than labels for thinking. No topic is too extreme or too small - the idea of the six hats approach is to promote lateral thinking.

You will need:

- Six hats or six big labels, colour-coded as the following:
 - Green for creativity, new ideas
 - Red for emotion
 - Black for negatives
 - Yellow for benefits
 - White for facts
 - Blue for reflection
- Flipchart to record ideas and reflections

1 Define the issue, proposal or strategy to be discussed.

2 As the discussion proceeds, ask people to take it in turn to wear the different hats and think from the perspective defined by the colour of that hat. If there is time they can all have a go at a different hat.

3 Make notes on the flipchart of the important points as they arise.

Solving other people's problems

Two simple ways of getting help

A.

You will need:

- Flipchart
- Marker pen

- 1 Divide into two or more small groups.
- 2 Each group identifies a problem on which they would like other people's input. Write the problem clearly on a piece of paper.
- 3 Exchange problems with another group.
- 4 Each group then discusses the problem for about 20 minutes and reports back on their key recommendations to the whole group.

OR

B.

You will need:

- Envelopes
- Masking tape
- One or two sheets of paper
- Marker pens

- 1 Divide into two or more small groups.
- 2 Each group identifies a problem on which they would like other people's input. Write the problem clearly on the outside of a large envelope. You can have more than one.
- 3 Tape the envelopes to the wall or put them on a table. Five minutes before a break, ask people to roam around and read the problems. If anyone has an idea for a solution or a good approach, write it down on a piece of paper, together with their name and contact details and put it in the envelope.
- 4 Groups collect their envelopes, read and discuss the ideas and make contact as wanted.



Section 7

Checking assumptions

Process	Time (based on a group of 10)
Group-think syndrome A word of warning	flexible
Worst case scenario and best case scenario This is useful when the group has a history of making planning assumptions that prove either over-optimistic or over-pessimistic	40 mins
Four hoops This tool helps test assumptions and biases	60 mins
Blinders Check what is being missed during planning	45 mins
Asking 'Why?' five times A way of unravelling symptoms to get to the root cause	40 mins
Decision shadow A visual way to understand the impact of different options	40 mins
Trip to Abilene A quick check to make sure plans are on the right track before it is too late	15 mins

Group-think syndrome

A word of warning



Group-think is a dangerous by-product of teams that look cohesive but aren't, or teams that live in fear. Group-think occurs when people strive to minimise differences and reach consensus without critically testing, analysing and evaluating ideas. If a group reaches decisions too quickly it may feel efficient and share the illusion of group agreement whilst actually missing the main point. This nearly always results in poor decisions.

This is a typical profile of the group-think syndrome:

- Group members are overly eager in their support for the leader's beliefs.
- Critical thinking is not encouraged or rewarded.
- Members believe that their group can do no wrong.
- Group members are too concerned about justifying their actions.
- Members apply pressure to those who do not support the majority.

You can avoid the group-think trap, but it sometimes takes courage:

- Encourage divergent thinking - one way to do this is to use the simple group process (see page 66) at the beginning of all discussions.
- Use your influence so that differences are not silenced when they emerge.
- Look at what causes hostility in yourself and others.
- Use process tools that encourage people to play the devil's advocate.
- Be sure, as a leader, that you are not overtly or subtly silencing those who disagree with you.

Worst case scenario and best case scenario

This is useful when the group has a history of making planning assumptions that prove either over-optimistic or over-pessimistic

Sometimes this process can help people break out of their old ways of thinking. It also adds a different dimension to planning - thinking about the worst or the best possibilities rather than just the most likely.

You will need:

- Flipchart
- Marker pens

1 Identify the issue, project or target to be discussed.

2 Go round the group asking each person in turn to think about the **worst that could happen**. This might include who within the organisation might oppose it, what other groups would say, how much it would cost, how the union would react. Note whatever is said on a flipchart.

Worst Case Scenario

3 Do the same thing again asking each person in turn to think about the **best case** and noting what they say. Be sure people have time to think, write and all contribute ideas. Again include specifics like support, partnerships, new income, value added.

Best Case Scenario

Some things will be out of your or the group's span of control. The 'Sphere of influence' process on page 41 helps define what the group cannot affect so it can move on. If the worst case scenario seems real and influencing factors cannot be changed, it is sensible to think again about your issue, project or target.



Four hoops

This tool helps test assumptions and biases


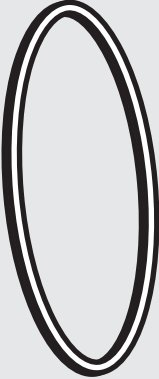
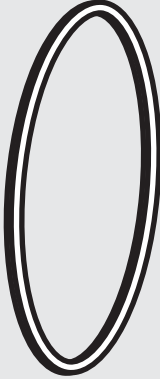

60 mins



Teams are often tempted to rush into planning before they have thoroughly understood their situation. We often base our knowledge on anecdotal evidence and personal bias. Before making decisions or rushing to action, it is good to jump through a few hoops.

You will need:

- Flipchart and pens
- A worksheet for each participant like this:

Four Hoops			
			
Facts	Bias and assumptions	Fears	Research
What are the facts and how do we know?	Where are my biases and assumptions? What are my interests?	What are my fears? What am I defending? What am I avoiding?	What do I need to know? What are the unanswered questions? Where can I find out?

- 1 Ask the group to work in teams of five.
- 2 Draw each hoop and text on a flipchart.
- 3 Work through the different hoops, starting on the left with sharing facts.
- 4 List comments and views on flipcharts.
- 5 Post flipcharts on the wall and work through them as a whole group.

Blinders

Check what is being missed during planning

45 mins

When there is little disagreement in a group it is easy to ignore biased interests, assumptions and personal enthusiasms.

1 Bring together a group of 'critical friends' who will be honest. It does not matter if they have stakes in the project that is being examined; that can be helpful.

2 Ask them to think about questions and answers that will challenge assumptions, surface bias and root out blind spots, for example:

- What assumptions are we making that have not really been tested?
- What is being 'protected' and why?
- What are our 'sacred cows' and why?
- Is anecdotal evidence the basis for our action?
- What imposed meanings - cultural, personal, organisational - are we using as a basis for our decisions and why?
- How have our 'expectations' or 'habits' kept us away from thinking differently?

3 They can use verbal or silent brainstorming (see page 69) depending how open and comfortable they are with each other.

4 Discuss what is shared. *Do not* argue about people's perception of the current 'Blinders'. Rather, come up with a way to approach and change them.

Ways to address the 'Blinders' might include:

- Data collection and action research
- Fact finding to dispel myths and assumptions
- Collecting observable data
- Recognising anecdotal evidence versus fact
- Recognising and labelling opinion versus fact
- Surfacing assumptions and testing accuracy

Strategy-based change (see page 50) is a good follow-up for this exercise. It gets people used to examining their thinking and forces a systematic look at data and evidence over opinion, assumption, habit, self-interest and untested, unproven theories.

Asking 'Why?' five times

A way of unravelling symptoms to get to the root cause



You will need:

- Flipcharts
- Pens

1 Define the issue or problem

2 Ask the question 'why' five times as per the example below.

It is likely that the multiple will converge to two or three system dysfunctions within the organisations.

The group can then move into planning actions to deal with each issue.

Issue: Students complain that the Advice Office is closed		
1 Why?	Adviser A is not available.	
2 Why?	A was asked by Senior Teacher B to see some students in distress in her tutor group immediately.	A did not tell B that her office would be closed as a consequence.
3 Why?	Two students had no money and didn't know what grants were available.	B did not think to ask about what might happen if A was away from her office.
4 Why?	This information hadn't been covered during their induction.	B doesn't know how A's office works.
5 Why?	The student induction programme needs to be reviewed.	There is a communication gap between teachers and support staff.

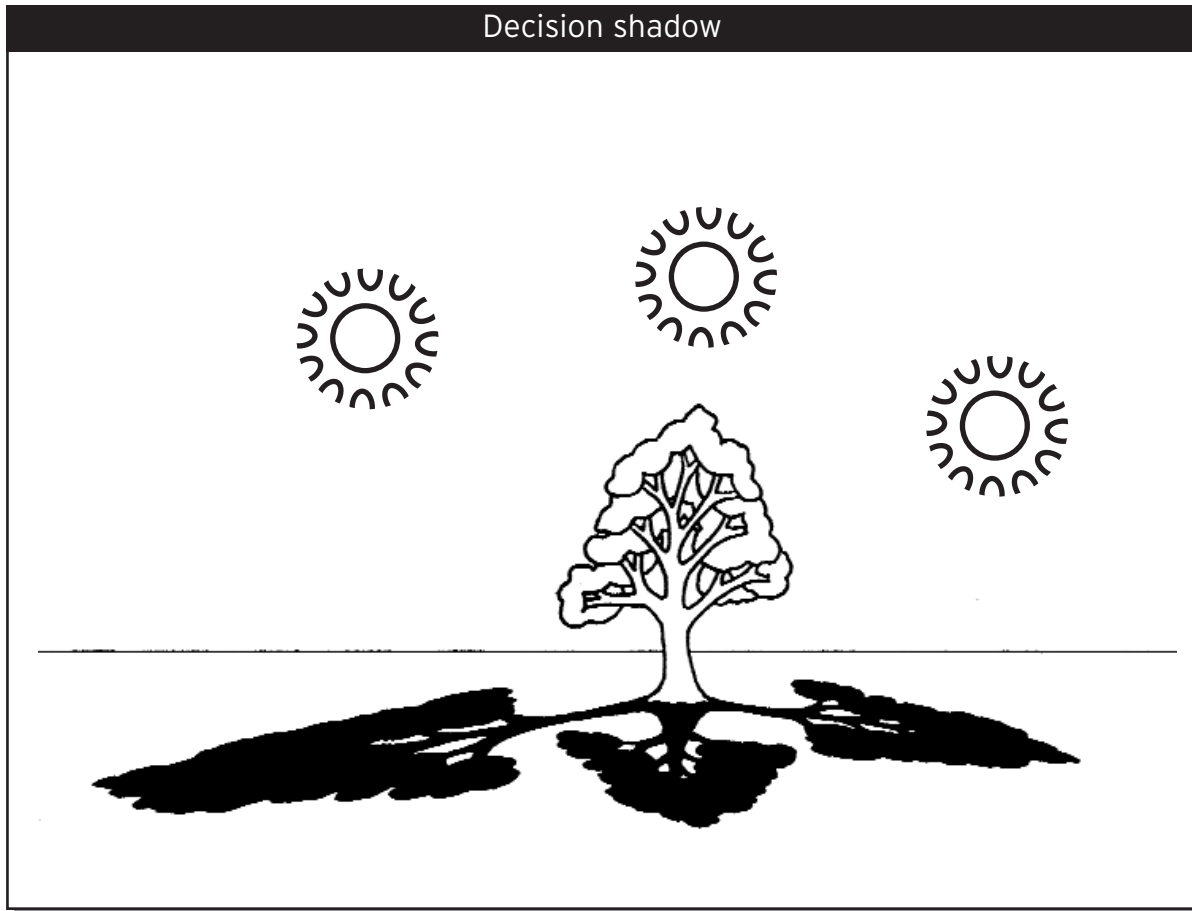
Decision shadow

A visual way to understand the impact of different options

All decisions cast a shadow of some sort; they have some impact beyond the immediate. Before a decision is final, it can be useful to determine where its shadow will fall and if the impact is likely to be significant. Sometimes different iterations of a decision have different impact.

You will need:

- A flipchart with a tree and suns drawn on it like this:



1 Taking each option in turn, brainstorm the likely negative impact and list in 'shadow' areas by the tree.

2 Evaluate the impact of the different options to reach a decision.

40 mins



Trip to Abilene

A quick check to be sure plans are on the right track before it is too late



15 mins



A group of people in a film started to plan a trip to Abilene, Texas. They put a lot of time and energy into planning their trip. It was complicated; they all got involved. It took time and effort. And, when it came down to the day to leave, everyone admitted they really did not want to go.

How did they miss that simple truth? It's not uncommon and happens in many planning sessions. People start down a path and the momentum, excitement, and apparent agreement leads to an unwanted destination. It can be avoided. Here is a simple way to do this in a session or a meeting that has some impetus around a project.

You will need:

- Flipcharts
- Marker pens

1 Tell the story of the film and then ask, 'Are we going to Abilene?'

2 Go around and ask for each person's responses. Note the main concerns on a flipchart. Ask participants to identify specific reasons for their thinking.

3 Discuss the concerns list and decide whether they are serious enough to make changes in the project, abandon it, or do other work to make things a better fit.

When you have used this once you can use it as a standing interjection... by asking 'Are we going to Abilene?' everyone will know what is meant.

Section 8

Sorting priorities

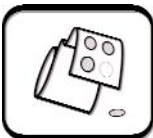
Process	Time (based on a group of 10)
Three dots each A visual picture of what matters most to most people	5 mins
Stop, caution and go Dot voting with depth	5 mins
Weighted voting A more sophisticated approach to establishing priorities	10 mins
Creating categories This sorts issues by consequence	15 mins
Weighing pros and cons A simple way to evaluate a proposal	30 mins
Testing enthusiasm A visual snapshot of the views of the group	5 mins
Weighing up alternatives A good way for a group to make a decision from a set of alternative options	40 mins

Three dots each

A visual picture of what matters most to most people



5 mins



Using sticky dots is a good way of giving a quick picture of what a group thinks. The process is quick, anonymous (so can help when there is conflict) and creates a visual prompt that usually generates good discussion.

You will need:

- Flipchart
- Marker pens
- Packet of sticky dots cut in threes

This is a basic tool that is useful when you want to narrow a long list down to a few priorities.

- 1** Give everyone three sticky dots and ask them to place them next to the issues that are most important to each of them. Everyone can then see at a glance what most people think important.
- 2** If it's useful, do a second round by selecting the most popular issues from round one and giving everyone one more differently coloured dot.

Stop, caution and go

Dot voting with depth

This is another version of simple dot voting but with a twist. Participants are asked to dot items with three colours to indicate their endorsement, hesitance or resistance to those issues.

You will need:

- Flipchart
- Marker pen
- Packet of green, yellow and red dots cut in threes

Green dots mean 'Go'

This indicates support and enthusiasm for the issue.

Yellow dots mean 'Caution'

This indicates that the participants could support the item, but there are unanswered questions or nagging concerns that need to be addressed.

Red dots mean 'Stop'

These dots indicate a resistance and lack of support.

After items are dotted, it is easy to see where the areas of concern or resistance are. Usually the items with green dots can be affirmed and noted. Time should be allotted to yellow and red dotted items in discussion. It can help to begin the discussion with the question 'Why might someone have concerns about this?'



Weighted voting

A more sophisticated approach to establishing priorities



10 mins



This is another way for the group to express their priorities.

You will need:

- Flipchart
- Marker pens

1 Explain to the group that the aim is to establish five priorities and that each person has 15 points (or £15 if you want to make it more exciting).

2 Explain and display on a flipchart how they should assign their points as follows:

- £5 to your first (most favourite) choice
- £4 to your second choice
- £3 to your third choice
- £2 to your fourth choice
- £1 to your fifth (least favourite) choice.

3 Everyone selects their issues, writes them on a piece of paper and assigns points.

4 Add the numbers against each issue to find the one with the highest score.

Creating categories

This sorts issues by consequence

This is useful when you want reach a collective view on the relative importance of all the different issues.

You will need:

- Flipchart
- Marker pens

1 Explain the categories **A**, **B**, **C** and write them on a flipchart that reads something like this:

A = something that must be done, that is critical to our success and there will be dire consequences if we don't do it.

B = something that we should do, that is important to our success and there will be some consequences if we don't do it.

C = something that would be good to do, that is desirable, but there are no consequences if we don't do it.

2 Ask everyone to assign each issue to one of the categories by writing the letter **A**, **B** or **C** next to the issue.

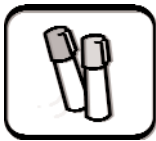
3 Sort the **As**, **Bs** and **Cs** onto three separate flipcharts and discuss the consequences.

15 mins



Weighing pros and cons

A simple way to evaluate a proposal



You will need:

- Paper
- Marker pens
- Flipchart

1 Write the proposal on the flipchart.

2 Hand out pieces of paper like this and ask people to work on their own, writing down what they see as the advantages, disadvantages and points that need further discussion for three minutes:

Proposal		
Pros	Cons	Needs further discussion

3 Share the pros and cons on a flipchart; if one outweighs the other significantly then the decision is obvious.

If there are a large number of discussion points then the group will need more time to explore these before it can make a decision.

Testing enthusiasm

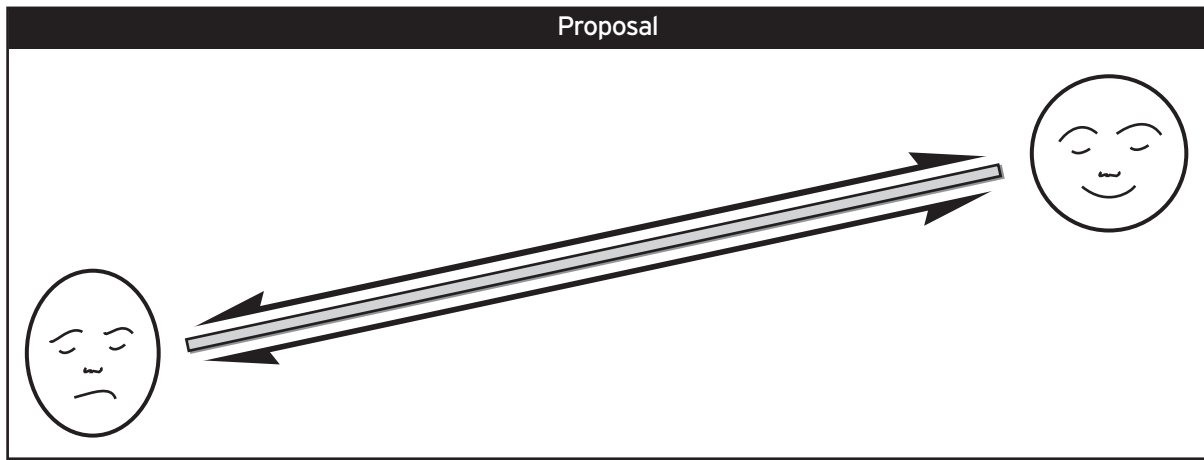
A visual snapshot of the views of the group

You will need:

- Flipchart paper
- Masking tape
- Marker pens
- Post-it notes

1 Agree the issue/proposal and write it on a flipchart.

2 Draw a long diagonal line across pieces of flipchart paper and tape to the wall.



3 At each end of the line you write an extreme, for example love/hate, support/reject

4 Ask group members to express their view of the proposal by marking with an X along the line.

5 You could also ask them to write why they feel like this on a Post-it note and stick it underneath their X.

5 mins



Weighing up alternatives

A good way for a group to make a decision from a set of alternative options



You will need:

- Flipchart
- Pens

1 List all the alternative options on a flipchart.

2 Ask people to divide into groups and assign a group to each of the alternative options.

3 Ask the groups to consider the best outcomes from having taken that option and the worst. Write their views on a piece of flipchart paper like that below and tape it to the wall.

Option	
Best outcomes	Worst outcomes

4 Everyone walks around the room and examines the different outcomes under each option and then ticks their preferred option.

5 The whole group reconvenes and considers the most popular option.

Section 9

Planning for action

Process

Making a flowchart

A visual way of moving from problem to solution to action plan

Action planning

A standard template for moving from discussion into doing

Checking progress against targets

A quick, frank and open exchange on progress

Responsibility matrix (RACI)

This helps a team assign tasks and assign responsibilities

Simple Gantt chart

A simple version of a Gantt chart to plan tasks against time

Making a commitment

An invitation to change

Confronting potential blocks and stops

This challenges different teams or team members to confront difficulties before they start to put their plan into action

Making a flowchart

A visual way of moving from problem to solution to action plan

60 mins



You will need:

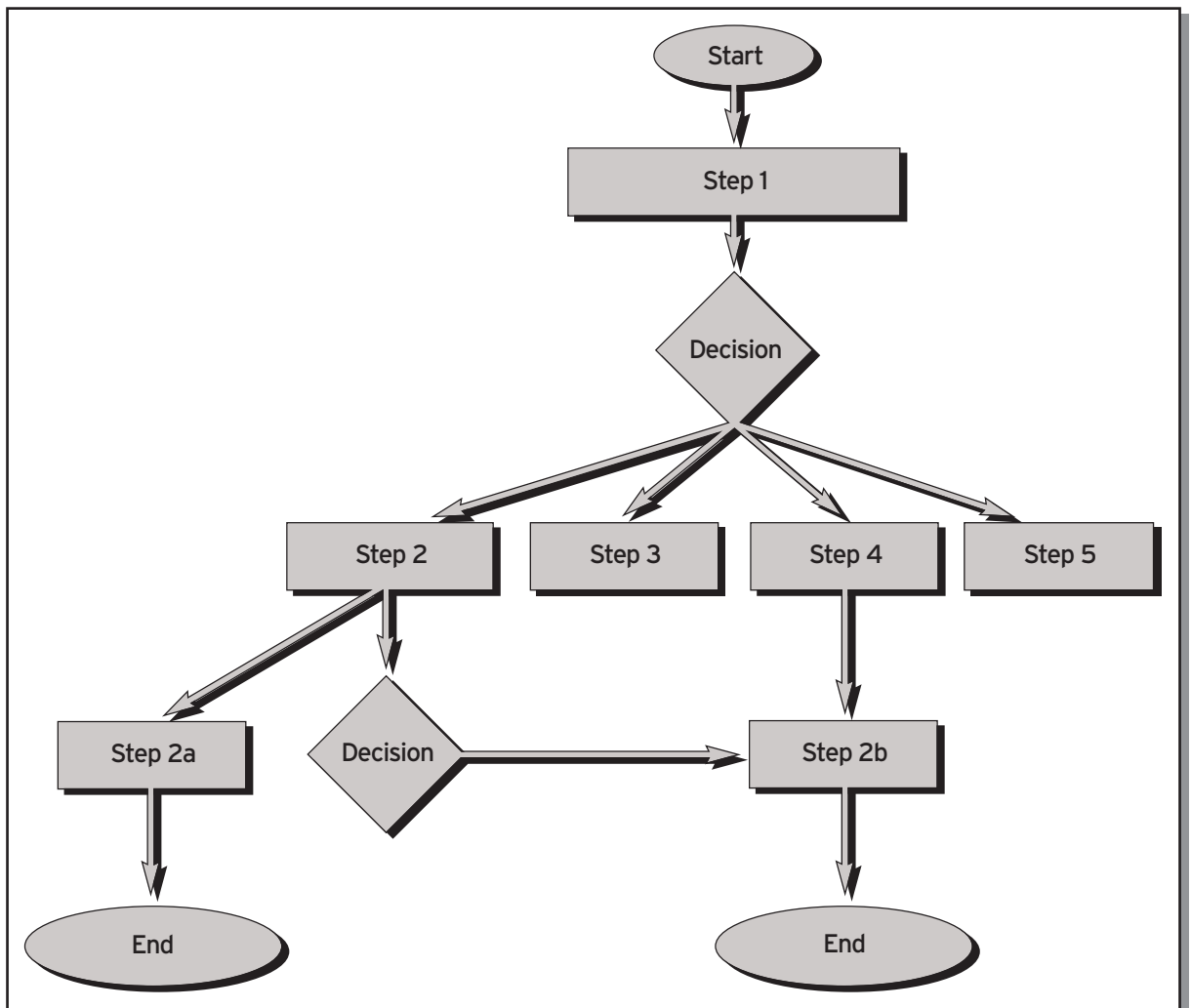
- Flipchart
- Marker pens

1 Explain the different symbols used in a flowchart:

- Oval = beginning or end of the flowchart
- Rectangle = actions or steps
- ◆ Diamond = decision points
- Circle = 'go to' symbol for when the chart is too big for one piece of paper
- ↔ Branching = can be Yes or No, or a number of branches showing different options.

2 Ask people to work in pairs or small groups and prepare a flowchart to illustrate moving the issue from where it is now to where they want to get to.

3 Groups then put their different flowcharts on the wall and discuss similarities and differences. For example:



Checking progress against targets

A quick, frank and open exchange on progress

2 mins



You will need:

- Flipchart
- Marker pens

1 Write each target on a piece of flipchart paper like this:

Target 1	Target 2
To increase sales by 5%	To increase participation in team meetings
Progress	Progress
1 _____ 5	1 _____ 5

2 As people walk into the room ask them to put a cross on the lines showing what progress they think the team is making towards achieving the target (where 1 = very little and 5 = a great deal).

Responsibility matrix (RACI)

This helps a team assign tasks and assign responsibilities



Before you get going you will need to agree symbols appropriate to your circumstances. The basic symbols are:

- R** = responsible
- A** = accountable
- C** = consulted
- I** = informed

You will need:

- A grid like this:

Tasks	Team members			
	Ahmed	Tom	Claire	Jim
Task 1				
Task 2				
Task 3				
Task 4				
Task 5				

1 List the tasks onto the grid.

2 Invite people to indicate which level of responsibility (RACI) they think they should have for each task.

3 Check the workload balance and discuss changes if necessary.

RACI can be used with large numbers of people. In this case, instead of using a matrix with names across the top, make a list of participants and assign each a number. They then write their number and the symbol, eg R24, against the task.

Simple Gantt chart

A simple version of a Gantt chart to plan tasks against time



Gantt charts are usually computer-generated by team leaders or planners. As well as assigning responsibilities, a Gantt chart gives a picture of critical milestones. The team can check the progress of their interdependent tasks.

You will need:

- A chart like this:

Tasks	Time			
	April	May	June	July
Task 1				
Task 2				
Task 3				
Task 4				
Task 5				
Task 6				
Task 7				
Task 8				
Task 9				

- 1 The team will need to agree individual symbols to represent themselves.
- 2 List the tasks.
- 3 Identify the time frame and break it into units that are sensible for your project, ie days or months or quarters or years.
- 4 Using each person's individual symbol, show when the tasks will begin and end.
- 5 Discuss key dependencies and any critical times when what is happening on one project might conflict with other parts of the business.
- 6 Use the completed Gantt chart as a discussion prompt in subsequent meetings to check progress.

Making a commitment

An invitation to change

You will need:

- Envelopes
- Pens
- Individual sheets like this:

I am going to...	With whom	By when



1 Ask people to consider what they want to do as a result of the discussion, for themselves and as members of the team.

2 Each person completes a Commitment Sheet.

3 They then put their sheets in an envelope and write their name and the date by which they expect to have completed the actions on the outside. The envelopes are put in their bring forward system or sent to them by the leader on the due date.

Confronting potential blocks and stops

This challenges different teams or team members to confront difficulties before they start to put their plan into action



This process requires some maturity, trust and confidence on the part of the team members and good facilitation skills from the leader.

A great deal of learning can come from the constructive management of honest and difficult feedback. Obviously it is hard when teams or individuals have to listen to criticisms, particularly so if they think they are unfounded. It is important to emphasise that only non-defensive responses are appropriate.

You will need:

- Worksheets like the one below (see template on page 154)

1 Ask every team member to review the agreed plan, complete the form below and give it to the facilitator/leader.

2 The facilitator/leader can review the comments. It may be necessary to ask team members to moderate, rephrase or redirect some remarks.

FEEDBACK FORM	
COMMENTS ON:	Name of team
FROM:	Name of team
If we are to achieve our shared vision and plan we need you to:	
STOP	
START	
KEEP	

In the meeting:

3 Each team takes the 'hot seat' in turn and the other teams feed back their views on the things the team should stop doing, start doing, make sure they value and keep doing.

4 Notes are taken on a flipchart so that the team can work on what has been said after the meeting.

Section 10

Getting past difficulties

Process	Time (based on a group of 10)
<p>Put it on a shelf Sometimes it is a good idea to park an issue if there is no immediate way to deal with it</p>	
<p>Getting back on track A constructive diversion for when meetings wander away from their main purpose</p>	15 mins
<p>Need a fresh perspective? Questions to ask when you have got stuck in a rut</p>	
<p>Is/is not Finding out more about the issue</p>	flexible
<p>Conditions for reaching consensus A good thing to do when opinions are locked</p>	15 mins
<p>Can't but can Finding a way forward when things feel hopeless</p>	40 mins
<p>Opposing arguments A way to help a group resolve their differences - it needs a neutral facilitator</p>	60 mins
<p>Feel good factor Sometimes a group just needs some time to see and appreciate each other</p>	60 mins

Put it on a shelf

Sometimes it is a good idea to park an issue if there is no immediate way to deal with it



You will need:

- Flipchart
- Post-it notes

1 At the beginning of a meeting stick a piece of flipchart paper with the heading PUT IT ON A SHELF on the wall and hand a supply of Post-it notes to participants.

2 Explain to the group that they can use this at any time during the meeting to record issues that arise, that don't belong in this meeting, but shouldn't get lost.

At intervals during, and definitely at the end of, the meeting, the group reviews the issues and decides how they should be taken forward.

Put on the shelf

Getting back on track

A constructive diversion for when meetings wander away from their main purpose

Sometimes meetings start to degenerate into conflict that you know will not be productive. It is important to recognise what is going on and do something about it by changing the pace and focusing on the tension as a topic.

You will need:

- Paper
- Marker pens

1 Explain what you think is happening in the meeting.

2 Ask people to work in pairs.

3 Ask them to brainstorm a list of what the meeting is *not* for, eg it is *not* for scoring points. It is *not* for...

4 Share lists, and move back to the main topic.

15 mins



Need a fresh perspective?

Questions to ask when you have got stuck in a rut

When no good new ideas are being suggested you could try looking at the problem or issue in a different way. Instead of generating ideas free-form, use these questions or make up your own:

BAD

- How can we make our situation worse?
- How can we make it more expensive?
- How can we make it inconvenient?
- How can we make it so senior management will hate it?
- How can we make it more complicated?
- How could we make it hard to assemble?
- How can we make this conflict worse?

MAD

- How can we make our situation really absurd?
- What if we exaggerate one or more of the parts?
- What if we did the opposite of what we set out to do?
- What if we did it backwards?
- What if we exaggerated the end or the beginning?
- What if we started in the middle instead of at the beginning?

DEAD

- What if we threw the whole thing out of the window?
- Is there anything we might be persuaded to keep?
- What is the worst part we could leave behind?
- What will we look back on and cringe about?
- What part of the problem will haunt us?

Once the group has looked at the situation in a different way, they may be convinced to change what they are doing or keep it as it is; stop some parts and expand others; take a serious look at what might not be ethical or might be historically problematic, and stop before it is too late. Some people might wish that Enron and some other massive failures had done a little of this type of thinking.

Is/is not

Finding out more about the issue

This is a tool used commonly by organisation development consultants. It is a tried and tested way to separate the causes from the symptoms of a problem or issue. It helps a group get a better understanding of how to proceed.

You will need:

- Flipchart
- Marker pens

On a flipchart create a visual grid with the words:

Is/is not		
Category	Is	Is not
What	What is it?	What isn't it?
Symptoms	What are the symptoms?	What are not the symptoms?
When	When is it observed?	When is it not observed?
Where	Where does it occur?	Where does it not occur?
Who	Who is involved? Who is affected?	Who is not involved? Who is not affected?
How	How does it manifest itself?	How doesn't it manifest itself?
Why	Why does this happen?	Why doesn't it happen?

Discuss each of these items. See if knowing more about what it is, and what it is not, helps explore the situation and lead the group to a better place.



Conditions for reaching consensus

A good thing to do when opinions are locked



This is useful when you need to help people move, or at the least explain, their position so that the group can attempt to reach agreement.

You will need:

- Paper set out as below
- Marker pens

- 1 Explain that everyone needs to move past stalemate.
- 2 Repeat the proposal.
- 3 Hand each person two pieces of paper.
- 4 Ask them either to complete one or the other:

I can live with this proposal

Name

I would live with this proposal IF... (please complete)

Name

- 5 Participants then hand their papers back to the facilitator who sorts and reads the IF...
- 6 The group discuss whether they can accept the conditions.
- 7 If not, the majority view may prevail.

Can't but can

Finding a way forward when things feel hopeless

Sometimes groups come up against obstacles that can become a focus or symbol for why things can't be done.

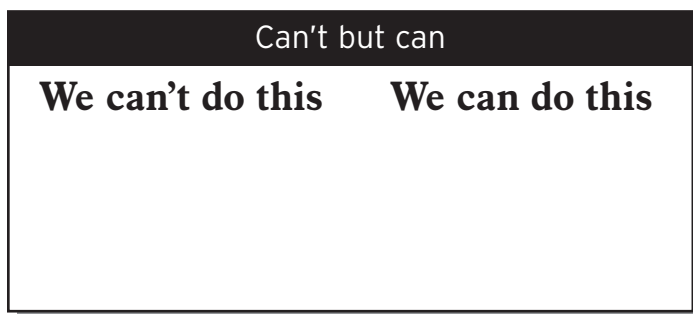
People can start to feel defeated in the face of 'yes but...'. The 'Can't but can' process breaks this sense of powerlessness and helps groups find a positive way forward.

You will need:

- Flipchart
- Marker pens

There are two methods of doing the exercise described below

On a flipchart write:



- i** Ask the group to clearly identify their 'Can't'. If possible, a 'Can't' should be linked to a 'Can' so people can find ways around one unsuccessful approach.

You can either brainstorm the information as a full group (if it is small) or break into smaller groups. If the group has really negative, obstructionist people who focus too much on the 'Can't', use an anonymous more structured process. For example, use Post-it notes to list individual ideas or put flipcharts around the room and invite people to write their ideas.

- ii** Discuss the ideas. The main point in this process is to identify the barriers and find ways around them so that action can be taken.

2 Another way to do this is an envelope exercise

This is useful when your 'Can'ts' belong to a department or individuals with supposed expertise that inhibits others from posing alternative 'Can' solutions.

You will need:

- Pens
- Envelopes
- Small pieces of paper

- 1** Place envelopes with the 'Can't' or the problem written on the outside.

- 2** Ask people to go and read the problem, suggest and write down solutions and place them in the envelope.

- 3** The team or individuals responsible for the different envelopes discuss the 'Can' ideas in their groups. They can pull other team members out of their groups to ask about the suggestion made.



Opposing arguments

A way to help a group resolve their differences – it needs a neutral facilitator



This is a useful tool to use when there are differing opinions about what to do or how to proceed. Sometimes these differences play out as special pleading or railroading and behaviour degenerates with some people withdrawing, others becoming cynical or sarcastic. These conflicts quickly become personal unless all sides are heard and understood. A lot of time is wasted in meetings when a simple process tool could help.

You will need:

- Flipchart
- Post-it notes
- Marker pens

1 The session leader should frame the issue (Framing tools, see page 38).

2 Ask people with differing positions to form into like-minded groups. Give them a specified amount of time to flesh out their thinking and to create a flipchart summarising key points. It can be two sheets, but shouldn't be longer.

3 Someone from each group presents the ideas to everyone. During the presentations the rest of the group (especially the opposing position) must listen carefully and consider what is said. This is extremely important. Don't do this exercise if the group cannot give their full attention to all of the positions presented.

4 The facilitator clarifies the issues from each group by asking them to write all the things that contribute to their view on the issue in question onto individual Post-it notes and place them on a flipchart like this, where position A and position B are opposing.

What we support:	
Position A	Position B
Issue	Issue
Issue	Issue

5 On another sheet of flipchart paper the facilitator draws the negotiating differences model (see next page).

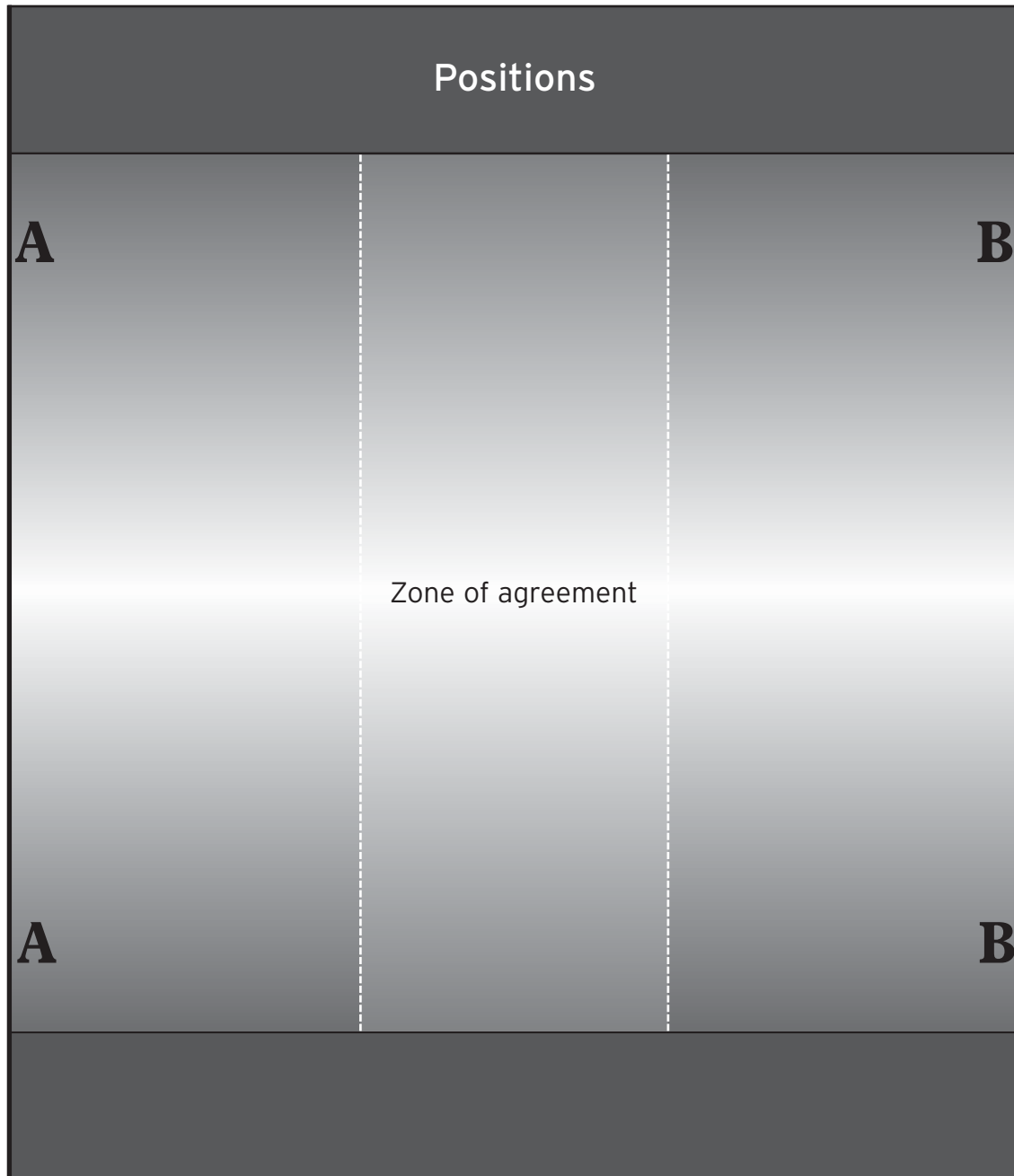
6 The facilitator explains that they are now going to place their comments between lines A and B according to their position. The distance from the 'zone of agreement' indicates how far they have to travel to get to consensus. S/he reads each issue and with the advice from the group places the Post-its on the model. They also identify what they don't know and need to research further.

7 The group looks at all of the presented ideas and those points within the 'zone of agreement'. A discussion should follow using a question such as: 'What do the differences look like and what could move them to the "zone of agreement?"'

8 In the discussion participants could explore minimum and maximum conditions. They need to talk in specifics if they are to reach a compromise or, at the very least, create a new position.

This tool can generate rich discussion or deepen divisions. It really depends on the ability of the group to look at differences in a way that will further the interests of the full group, team or organisation.

Negotiating differences model



Feel good factor

Sometimes a group just needs some time to see and appreciate each other



People who work together every day can easily take each other's good qualities for granted. This exercise makes people stop for a minute and exchange positive comments. Some people find it hard to be on the receiving end of compliments so this is good practice.

- 1** Ask people to divide into random groups of four or five.
- 2** Arrange chairs in a horseshoe with one (the 'hot seat') facing the semi-circle.
- 3** Take it in turns to sit in the 'hot seat'.
- 4** Each of those in the semi-circle takes it in turns to comment on one positive trait or characteristic that they like, admire, have noticed about the person in the hot seat.

The person in the hot seat is not invited to comment beyond saying thank you.

Section 11

Dealing with conflict

Process	Time (based on a group of 10)
Dealing with group problems The role of the leader	
Managing position taking (1) Short version for groups that do not meet often but can't get past an issue	45 mins
Managing position taking (2) Slightly longer version for ongoing groups	60 mins
SOLVE This is a series of steps to depersonalise issues. It is simple and linear	60 mins
Spectrum strategy This can help people understand different points of view	40 mins
Flagging Letting everyone know what the 'hot' issues are	15 mins
Blips on the radar screen Working with colleagues to understand what is really going on or likely to arise	

Dealing with group problems

The role of the leader

When people are under pressure or feeling threatened they may behave defensively, or apathetically, blame and judge each other, or want to give up or run away. This kind of behaviour can lead to a loss of trust, resentment, stress, tension and the group becoming polarised.

It is important to move the focus of conflict from the interpersonal or personal to the substantive through the use of structure and process.

As the meeting leader there are things you can do to prepare yourself. It is a good idea to use preventative strategies whenever possible - for example:

- Ground rules (see page 9)
- Roles to balance power and participation (see page 10)
- Simple group process (see page 66)

If possible ask the group to agree on a process to make decisions or resolve conflicts *before* they occur. You may decide to involve the group in looking at and solving the problem. What does the group do to allow or encourage this behaviour? What could the group do differently?

Importantly, the leader needs to respond in proportion to the seriousness of the problems. Let small disruptions go without much ado; respond as the degree of disruption increases. These are the options:

- Do nothing... let the group deal with it.
- One to one conversations outside the group. Ask the person about their concerns, give constructive feedback.
- General group problem solving. Use an agreed problem-solving tool. Brainstorm with the group about strategies and needs.
- Confront outside of the group. After other attempts have failed and the behaviour continues, give feedback and explain the consequences. Explore options. Offer your help.
- Group confrontation. This is a high-risk strategy. It should be facilitated carefully. You must be well-prepared and make sure group members use constructive feedback guidelines.

There are many effective tools to use when conflict in a group has not escalated to an intractable level. Some of the process tools that follow can help.

Managing position taking (1)

Short version for groups that do not meet often but can't get past an issue

A square icon with a rounded border and a sunburst pattern in the background. The text "45 mins" is centered within the square.

1 Clarify the issue so that group members share a common understanding of what is being discussed. **Do not cut this short.** Many conflicts come from a simple difference of perspective. Make sure everyone is on the same page.

2 Start by going round the group and ask each person to briefly state their view.

3 Use an anonymous method like Affinity grouping (see page 71) to answer the question 'What concerns or threats does this issue raise?' (Silently brainstorm onto Post-it notes, then place on the wall, sort into themed groups of issues and give each a name.)

4 When these themes have been shared by the whole group ask people to move into groups of two or three of **differing views**.

5 Each pair or triad is asked to develop a **new option** with components of the old and completely new ideas.

6 Each group reports on their new idea and it is discussed by everyone.

If no single favoured option emerges:

7 The group attempts to merge the best elements of the different ideas.

8 Where this process is unsuccessful the leader will need to decide either to:

- start again
- decide what is to be done, explain the reasons for the decision and move the group on.

Managing position taking (2)

Slightly longer version for ongoing groups



You will need:

- Flipchart
- Marker pens

- 1** Ask the group to agree criteria for making good decisions. List these on a flipchart.
- 2** Clarify the issue so that group members share a common understanding of what is being discussed. **Do not cut this short.** Many conflicts come from a simple difference of perspective. Make sure everyone is on the same page.
- 3** Start by going round the group and ask each person to briefly state their view.
- 4** Use an anonymous method like Affinity grouping (see page 71) to answer the question 'What concerns or threats does this issue raise?' (Silently brainstorm onto Post-it notes, then place on the wall, sort into themed groups of issues and give each a name.)
- 5** When these themes have been shared by the whole group ask people to move into groups of two or three of **differing views**.
- 6** Each pair or triad is asked to develop a **new option** with components of the old and completely new ideas.
- 7** Each group reports on their new design and the ideas discussed by everyone.

If no single favoured option emerges:

- 8** The group attempts to merge the best elements of the different designs.
- 9** Apply the decision-making criteria to each of the new options.

SOLVE

This is a series of steps to de-personalise issues. It is simple and linear

- (S)** Ask people in turn to **state** the problem simply to the group.
- (O)** Ask each person to work on their own and **outline** their response/solution to the problem.
- (L)** List the alternatives on a flipchart.
- (V)** Taking each alternative in turn, the group **visualises** the consequences of each. What would happen if we did this or that?
- (E)** The group **evaluates** its progress towards solving the problem.

Groups can do this exercise together or individually and then share ideas. Either way, the intent is to provide a structure to get people to work through issues or problems cooperatively.

A square icon with a rounded border containing a clock face and the text "60 mins".

60 mins

Spectrum strategy

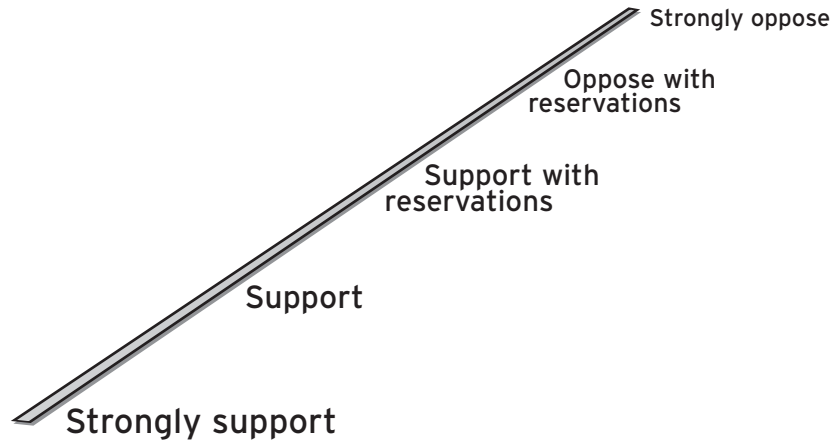
This can help people understand different points of view



1 Frame and set in context the controversial issue to be explored.

2 Explain that the purpose of the exercise is to **understand** the other side, **not to convince** them that you are right.

3 Draw a line on the floor with each end representing a different end of the spectrum.



4 Ask people to stand on the line by their position on the issue.

5 Ask people from opposite ends of the spectrum to pair off and discuss their position. Each pair is asked to listen to the other side; look at assumptions, facts, experience, questions and other factors. This is a good wandering exercise where people can go for a walk if that is possible.

6 After an agreed time, pairs come back and share what they learned. Hopefully in the report back participants will have tried to understand a different point of view.

Flagging

Letting everyone know what the 'hot' issues are

Flagging up the issues that are painful or sacred cows to some people in the group can save time and soften interpersonal conflict.

It should only take a short time but can lead to longer discussions if the controversial issues are intense and widespread. It is useful for everyone to think about why some issues are 'hot' so that discussions can be approached with understanding and communication problems avoided.

There are two approaches to flagging

1 Verbal go round If your group is comfortable and honest with each other, simply go around the group and invite everyone to assign an 'intensity number' (1= low to 5= high) to the issues that are on the agenda. This is not a discussion. People just say the number and do not justify or explain their comment. If the group is big, divide into small groups.

2 Private dots This is useful when there are tensions in the group and a more anonymous method is helpful.

You will need:

- Flipchart
- Sticky dots

i Give people sticky dots as they arrive.

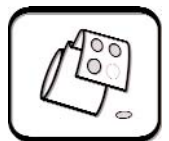
ii On a flipchart in a relatively private place draw the agenda and a scale like this:

Agenda	Scale
Item 1	1 2 3 4 5 _____
Item 2	1 2 3 4 5 _____
Item 3	1 2 3 4 5 _____
Item 4	1 2 3 4 5 _____

3 Ask people to put their dots against any item they feel is a hot or difficult item.

4 Once dotted, the facilitator can pose questions about why the issue is a hot one. But it is important not to ask who dotted where. Rather, pose the question, 'Why might there be strong concerns about this issue?' This will make the full group think about the concerns of others.

Depending on how agendas for meetings are generated, it is possible to have participants place a dot on an agenda item either beforehand or at the meeting. This gives a visual clue to everyone.



Blips on the radar screen

Working with colleagues to understand what is really going on or likely to arise

This process helps the team look for indicators of problems that might arise in the future. It is like looking at a radar screen and seeing a signal or a blip. It may not seem very important, but you never know until you investigate. Is it simply a big fish swimming harmlessly by or a huge iceberg? Whichever, you need to know.

Usually conflict or significant problems begin as blips that are noted but not really explored. They are often early warning indicators of larger events that will cause disruption. It is helpful to pay attention to the blips before they wreck the ship.

When something out of the ordinary happens, it is good to ask yourself what this means. Go to a person you work with and talk it through with them. Their role is to keep you from making assumptions or dismissing the 'blip' too quickly.

Talk over incidents with colleagues and determine:

- Is this just a blip or is there indication of a pattern?
- If a pattern is developing, what do we know? What do I need to know?
- Who can investigate and who should be asked? How large is the problem?
- What is the fact-finding timeline?

Once information has been gathered decide what should be done. Some options include:

- 1** This is not important so I will ignore it for now.
- 2** This is important but not yet at a serious level. I will go for a low-level intervention which might include talking to the people involved or setting some goals for the group, or using better processes in meetings to avoid personalising.
- 3** It is important and is getting serious. A more considered intervention is needed. This might be establishing ongoing negotiation between the parties, helping one of the individuals, or changing assignments for team members.
- 4** This is very serious: an outside mediator is needed, or a change to a decision, or a transfer of people.

Section 12

Endings

Process	Time (based on a group of 10)
Ending meeting protocols What was accomplished, hopes and fears, closing circle	flexible
Evaluating what happened Different approaches	flexible
Taking the temperature A simple and direct evaluation	2 mins
Session evaluation templates	

Ending meeting protocols

What was accomplished, hopes and fears, closing circle



Before you start to close the meeting it's a good idea to make sure:

- Everyone is clear if decisions have been made and, if they have, what they are.
- Everyone has had a chance to sign up to any actions to be taken.
- It is understood by all when any actions need to be completed. Producing an action plan or notes with actions and commitments is a safe way of making sure these things are covered.
- Everyone is acknowledged and thanked for their work.

What was accomplished today?

In some meetings, it can be useful to summarise what happened and what will happen as next steps. This is not an opportunity to rehash decisions, but a quick review of the work and achievements to acknowledge people's efforts.

Hopes and fears (see page 32)

If you used this at the beginning of the meeting refer back to it at the close. Go round the circle and ask people to comment on how the meeting reflected their hopes and fears.

Closing circle

However short the meeting it is a good idea to bring people together and give each one an opportunity to say a few words. Sometimes facilitators pass round a 'talking stick' (this can be any suitable object) to show when it is each person's turn to talk. A person can only talk whilst they are holding the object. The facilitator needs to make it clear this isn't the time for speeches.

You can set the tone and agenda for the closing circle by inviting people to:

- share observations from the meeting
- tell colleagues anything they need to know that is nothing to do with the meeting
- raise issues for discussion at future meetings.

Evaluating what happened

Different approaches

It is always useful to get feedback on how the meeting went. Here are some alternative approaches.

You will need:

- Flipchart
- Marker pens

- **'Go around' and ask for response.** This works with a small and honest group, used to working together and willing to give real evaluative responses.

- **Use written evaluations** like the examples on pages 136, 138 & 139.

- **Create a scale** on a flipchart and place it in an accessible area. Ask people to place a cross on it at a break in the meeting. This way you get a visual and anonymous rating which can lead to discussion.

- **Quickly ask the group some of these questions:**
 - What worked well?
 - What did not work so well? Link that to a suggestion for change.
 - What were the three most important things you heard today?
 - Based on what we've learned today, what one thing can we do now that will improve our work?

- **Post two flipcharts throughout the session with the headings:**
 - What worked well?
 - What did not work so well? Link to a suggestion for change.

Ask people to make notes on the flipcharts and review at the end of the meeting.



Taking the temperature

A simple and direct evaluation

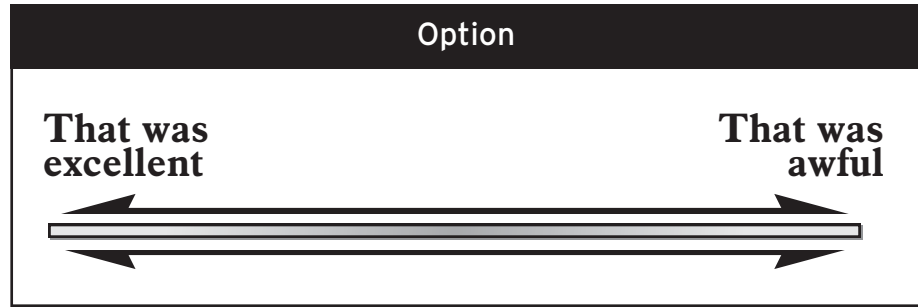
2 mins



You will need:

- Flipchart
- Marker pens
- Post-it notes

1 Put a flipchart on the wall by the door with a line drawn like this:



2 As they leave the meeting, invite people to draw a cross to show where on the continuum they rate their experience.

3 If they want they can then write more information about how they feel on Post-it notes and put near the cross.

Session evaluation templates

These four session evaluation templates are reproduced as photocopyable A4 pages in the templates section at the back of this book. They can also be printed directly from the CD-Rom.



Session evaluation template (1)

Session Evaluation

Workshop/meeting topic:

Your name:

I thought these things were useful:

I think these things were a problem and here are my suggestions:

In my opinion the session was (please tick):

Very interesting and useful

Somewhat interesting and useful

A waste of my time

Other comments:

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Session evaluation template (2)

Session Evaluation

Something that made me think

Something I enjoyed

Something I would have done without

Something to take away with me

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Session evaluation template (3)

Session Evaluation

Workshop Topic: Presenters:

I appreciated and valued these things:

Problems & Suggestions

Something learned that I will use:

In my opinion, the workshop was:

very interesting & useful

somewhat interesting & useful

a drag & useless

Other comments:

Your name (optional):

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Session evaluation template (4)

Session Evaluation

1 On a scale of 1 (excellent) to 10 (awful), how far did we succeed in fulfilling _____

1 2 3 4 5 6 7 8 9 10

2 On a scale of 1 (excellent) to 10 (awful), how far did you fulfil your purpose in attending the session?

1 2 3 4 5 6 7 8 9 10

3. Why did you score these questions as you did?

4. What do we need to do next together and individually?

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Section 13

Large group interventions

All the processes described in this section can be used with very large numbers of people. It is sensible to use a facilitator

Process
Open Space
Appreciative Inquiry
Action Research
Scenario Planning
Future Search
Imaginisiation
Knowledge Café

Open Space

Open Space is a way of organising a meeting or a conference so that there is maximum participation, self-management, energy and focus. Open Space was developed by Harrison Owen, after he realised that, for many people, the most energetic and enjoyable part of the conferences and meetings they attended was the coffee break. So he designed the process to excite the same levels of energy, interest and involvement.

Open Space can be used for huge, large or small meetings. Whatever the number of participants or time available, an open space meeting will allow everyone to work on the issues that matter to them, for which they have some passion and for which they might want to take some responsibility in the future.

An Open Space meeting must have a clear theme and focus that will make people want to attend. Although distinguished experts may be present there are no platform speeches or presentations. The meeting starts with all participants sitting in a circle, or concentric circles if space is limited. The sponsor introduces the theme of the meeting and the facilitator then walks around the circle and explains how the meeting will work.

Participants are invited to think about a topic they would like to work on with others whilst the facilitator describes the principles of Open Space and the 'law of two feet' that encourages people to move groups if they find they are in one to which they cannot contribute. People are then invited to come to the centre of the circle and write down their topic on a piece of paper, read it out and post it on the 'agenda wall' to create the programme of workshops for the event. By the end of the first hour the agenda wall is covered with workshop topics arranged at clear times in identified breakout rooms or spaces.

Participants then sign up to take part in the different workshops throughout the day according to their interests. Workshops are led by the people who identified the topic and notes are taken by a volunteer reporter.

At the end of each workshop the (short) notes of the discussion are typed and recommendations from each group are posted on the walls for all to see.

If the meeting is one where it is useful to see what the 'hot issues' are, the facilitator will help participants prioritise the recommendations. In meetings where people are working in teams, or for the same organisation, or in the same locality they may move into an action planning session.

Finally people return to the circle to comment on their experience of the meeting. It is common for people to say that they had been a bit sceptical when they arrived but found it useful and enjoyed it hugely. Open Space meetings always excite high levels of energy and participation.

The record of proceedings is either sent by email to all participants after the meeting or, if practicable, collated and handed out at, or soon after, the end of the day.

For more about Open Space see www.gettingonbrilliantly.com and www.openspaceuk.com

Appreciative Inquiry

Appreciative Inquiry was created by Dr David L Cooperrider. He describes the process in this way:

Appreciative Inquiry (AI) is the cooperative search for the best in people, their organisations, and the world around them. AI involves the art and practice of asking questions that strengthen a system's capacity to heighten positive potential. It mobilises inquiry through crafting an "unconditional positive question" often involving hundreds or sometimes thousands of people. In AI, intervention gives way to imagination and innovation; instead of negation, criticism and spiralling diagnosis there is discovery, dream and design. AI assumes that every living system has untapped, rich and inspiring accounts of the positive. Link this "positive change core" directly to any change agenda, and changes never thought possible are suddenly and democratically mobilised.'

The simple, but radical, ingredient in Appreciative Inquiry is that instead of thinking about problems and dysfunction, the starting point is the positive, the dream building on everyone's experience and imagination of what works well.

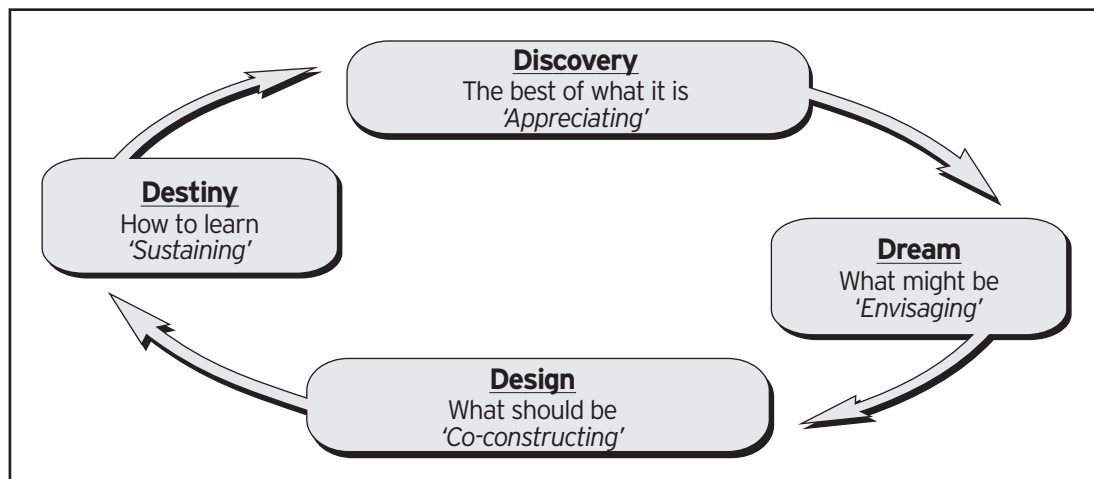
One of the underlying assumptions in Appreciative Inquiry is that in every organisation something works. The process uses questioning to reveal positive and shared experience which everyone can use. People are invited to explore the best parts of their past experience and to analyse its core components. Stories are told, conversations build on positive questioning and people appreciate the best of what is, imagine what might be, talk about what could be and create the future together.

So, for example, an organisation might want to improve its front line customer care. It would be explicit about this ambition. People in the jobs with customer care experience and responsibility, and possibly customers, would be invited to describe their most memorable experience of giving excellent customer care. They might be invited to ask to describe an incident when they, or someone they know, went the extra mile to provide a really good service. Positive stories like these may be followed by a series of questions, for example:

- What made that possible?
- What was it about you that made it happen?
- Who else was involved and what did they do to make it such a success?
- What ideas do you have to make our customer service exceptionally good?
- And what ideas do you have to make things easier for us all to deliver this kind of service?

People would then co-construct a future service from the themes in their stories and answers to questions. They can design options, and select the ways in which they will deliver the service they have all agreed on.

Appreciative Inquiry process is a 4D cycle.



For more on Appreciative Inquiry see <http://appreciativeinquiry.cwru.edu/>

Action Research

Action Research is a very powerful process. An external facilitator is needed who can ask questions, coach the group through difficult times, support data analysis and keep the group on track with the process.

There are seven steps that you will work through:

- 1** Firstly everyone needs to **define the issue** and determine an area where there is a desire for change or a need to analyse effectiveness.
- 2** Then the group **collects data** and information to check if everyone's assumptions are accurate.
- 3, 4** The **data is analysed** and **hypothesis formulated**, for example, 'If we do this..., then that might happen'.
- 5** The group then works to **design an intervention** action or change. Staff are included in formulating the hypothesis and creating the intervention. Each proposed intervention needs to be tested for potential strengths and weaknesses with the people who would know most about that part of the business.
- 6 Implementation.** This is when the leader has to encourage and insist that everyone is patient and plays their part. Usually it takes a while to make a change, especially when it means changing behaviour. People need to help each other through rough patches and not give up just because something didn't work straight away.
- 7** Some time goes past and then the iteration starts again with collecting data, **assessing outcomes**, determining if change is still needed and **starting the cycle again**. It takes less energy as time goes on.

This process works but it takes patience, good leadership, the ability of a team to collect and listen to data. Use Action Research for important issues. It is well worth the organisational energy and effort.

Susan used Action Research in a small rural school where there were lots of student behavioural problems and issues with staff morale. Teachers were burned out and there had been four principals in four years. It was a bad situation. The students and parents were not supporting the teachers, and the assistants were working counterproductively with teaching staff. The staff implemented an Action Research plan to change the 'climate' of their school. Over a two-year period, everything improved. The teachers pulled together. The principal became part of the team. In the academic rating system used in Oregon to assess school effectiveness, the school changed from Adequate to Strong within those two years. All of this occurred because the staff stopped making decisions based on anecdotal evidence and reacting with micro-management. Instead they looked systematically at trends and patterns, collected data and checked information and all staff targeted a strategy to effect change. It worked.

Scenario Planning

Long-range planning has been a very linear and inflexible process in the past, out of step with a fast-changing and chaotic world. Scenario Planning helps people to imagine the future and respond intelligently. Based on their knowledge of the past and present, groups construct different stories about what might happen in the future. Scenario Planning develops multiple options for action that may or may not be used when the time comes. It is useful where planning is seen as important but both the current and future situation is in flux.

1 Identify your focus

The discussion begins with specifics and then broadens out to consider more general trends in the environment. The kind of question that is posed is 'What decisions have to be made now that have long-term effect on the enterprise?'

2 Identify and analyse micro-level issues

The group moves on to identify all of the factors at the local level, both positive and negative, that could influence the decision. They collect data about all the people and issues integral to the issue. Thorough research includes the examination of what will be viewed as a success or a failure to customers, board members, staff and shareholders.

3 Analyse macro- and micro-level driving forces

The driving trends in the macro-environment are considered. Research social, economic, political, environmental and technological trends and influences. The driving factors in the micro-environment are identified. What is inevitable or probable as well as unpredictable in our future is discussed. A scenario planner looks for major trends and trend breaks.

4 Rank for importance and uncertainty

The key factors and driving trends are ranked on the basis of degree of importance for the success and the degree of surrounding uncertainty. Two or three important predictable areas and uncertain areas are identified.

5 Select scenario drivers and determine the variable

Determine scenario drivers - the fundamental and important factors that differ in the created scenarios. Identify key variables that have an impact on the driving forces.

6 Flesh out the scenarios

The story beyond the simple choices that have arisen thus far is developed. Different plots that capture the dynamics of a complex future whilst focusing on the key concerns are created.

7 Determine the implications

For each scenario, future actions and implications are brainstormed. Groups make the most of the situation regardless of constraints and ask questions like 'What will improve our chances?'

8 Select the most likely

The scenario closest to what might happen is chosen. Time is spent imagining how the situation will be monitored and evaluated as it unfolds.

Future Search

Marvin Weisbord devised the Future Search conference model to bring together a broad constituency of stakeholders with diverse views to solve whole systems problems. The forum is participatory. There are no long lectures. No one leader dominates. Instead, experts sit as peers with ordinary citizens to express experiences and ideas. The process promotes dignity, meaning and a sense of community in generating solutions.

The Future Search conference framework is flexible and can be adapted to any topic and is particularly good for solving problems. It is predicated on core values that do not change. They are:

- Everyone has knowledge that can be used in solving problems.
- People can create their own future.
- People want the opportunity to be actively involved.
- People would rather cooperate than fight if given the option.
- Everyone is equal.
- Process can help to empower people.
- Diversity should be valued.

A Future Search conference begins by getting 'the whole system in the room'. This means all people with a stake in the issue or knowledge about it must be invited. The process encourages the maximum variety and diversity of interdependent people to share their multiple perspectives. This usually means inviting large numbers of people from varied backgrounds.

The model emphasises developing a common understanding of the 'whole system'. Participants first explore the larger context such as events, trends, and reactions within and/or between the wider world and the issue and develop their shared knowledge. Participants build a common understanding of the past, present and possible, desirable future outcomes. This generates the broadest possible database and a collective ideal before moving on to problem-solving and planning.

In the next step, people generate possible areas where work will be effective. Sometimes these topics are at odds with each other. However, each is explored as the group considers how best to proceed in achieving goals and supporting values. Participants join small, self-managing groups where they have strong commitment. During this work, people join together, find common interests, sort out differences and generate collaborative solutions in areas where they have great interest.

Next, the entire group reforms and ideas are shared. Discussion continues and plans emerge as people take on ownership. An important aspect of the process includes empowering people to take action whilst still coordinating the activity with the group's stated goals and values. Within each of these steps process tools like those found in this book help people communicate constructively whilst still promoting a free unfolding of ideas.

Future Search has been used in many different forms to create social, political and economic organisational change.

Imaginisation

Gareth Morgan developed the process of Imaginisation to understand organisations as metaphorical constructs. Using our imagination helps us look at how we see things afresh and to challenge taken-for-granted assumptions. If we create new images about our situations, we are more likely to consider new ways of acting. Imaginisation is a creative process which can apply to large or small issues. It differs from other organisational tools in that it is not linear or exclusively analytical. Instead it considers unquantifiable data and cognitive dissonance to provide insight and encourage creative thinking.

Morgan looks at the images people generate within the organisation to describe management, organisation, values and projects. For example, when people talk about a competitor they may use sporting or warring metaphors - unlike when they describe a new project, when they are more likely to use gardening or biological images. In the Imaginisation process, metaphors are generated and analysed. People come together to discuss what these images say about their approaches. This uncovers bias. Underlying values, motivation, concerns and limitations are recognised and possibly changed.

Morgan also suggests that we can reinvent our roles, organisational structures and even our way of doing business by reframing our descriptions. We may describe a manager as a 'General' but see things differently if that position is identified with a 'ballet dancer' or 'welder' on a suspension bridge. The Imaginisation process encourages us to ask 'How might that description change the role and would that be useful?' 'What if...?' questions also generate new ways of looking at how we organise our work. Recharacterising traditional ways of thinking can help reshape them.

Techniques used in Imaginisation help us analyse organisational culture in non-linear ways. Feelings, humour and impressions become part of what we consider in planning. The process focuses on management styles, organisational units and traditional work assignments, reframing basic structures and roles, diagnosing problems. It insists on approaching issues in new ways and breaking out of traditional thinking to support change efforts.

Knowledge Café

Knowledge Cafés can be run with large numbers of people. A space is set up like a café with small tables that seat four or five people spread around the room randomly. Colourful tablecloths and flowers create an ambiance very different from that of your average conference. On each table there are large sheets of paper and marker pens for scribbling, drawing and making notes.

This is a good process for large groups of people who want to share information and insights on topics of mutual interest. The sponsor of the meeting introduces the topic and a facilitator explains how the process will work.

There are usually three rounds of conversation each lasting about 30 minutes. After the first round of conversation, one person is asked to remain at the table as the 'host' whilst the others go to new tables. Those moving carry the ideas, themes and questions from their discussion into their new conversations.

The table host welcomes the new guests and briefly shares the main ideas, themes and questions of the initial conversation. The new discussion then starts, linking and connecting ideas that the guests brought from their previous table conversations, listening carefully and building on each other's contributions.

By providing opportunities for people to move in several rounds of conversations, ideas, questions and themes begin to link and connect. At the end of the second round common themes start to emerge.

In the third round people may return to their original table to synthesise their experience or may enjoy being part of another group. In the last phase of the café the table groups spend a few minutes considering what has occurred in their rounds. They distil their experience to a few nuggets (recorded on flipcharts). The facilitator can either ask each table to report or post their conclusions on the wall for people to wander round and read. After the meeting these can be typed up as reports of the proceedings, sent to participants and shared with others not at the meeting.

Section 14

Using graphics

It can be really useful to use drawings in meetings. Some people are more visual and find working and thinking with pictures helpful. A simple drawing can illuminate meaning for everyone.

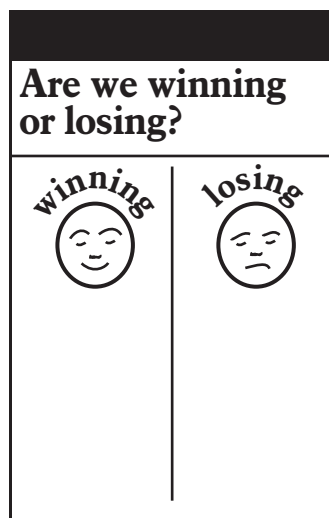
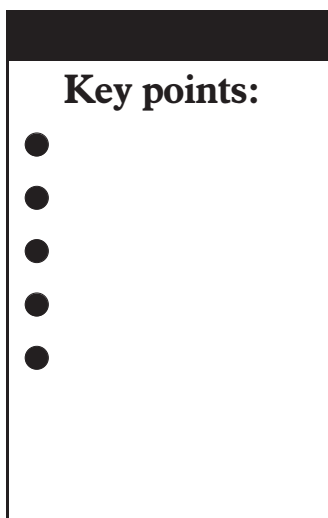
Drawings can be used in several different ways. They can be used to 'dress' the room so that when people arrive they have something to look at; the posters or pictures pull them in to what is going to happen.

So, for example:



The most simple visuals are grids, lists and matrixes drawn quickly on a flipchart to record a conversation. They often make what is being said a great deal more explicit and it becomes clearer where there is and isn't agreement. They also speed up the notetaking task.

For example:

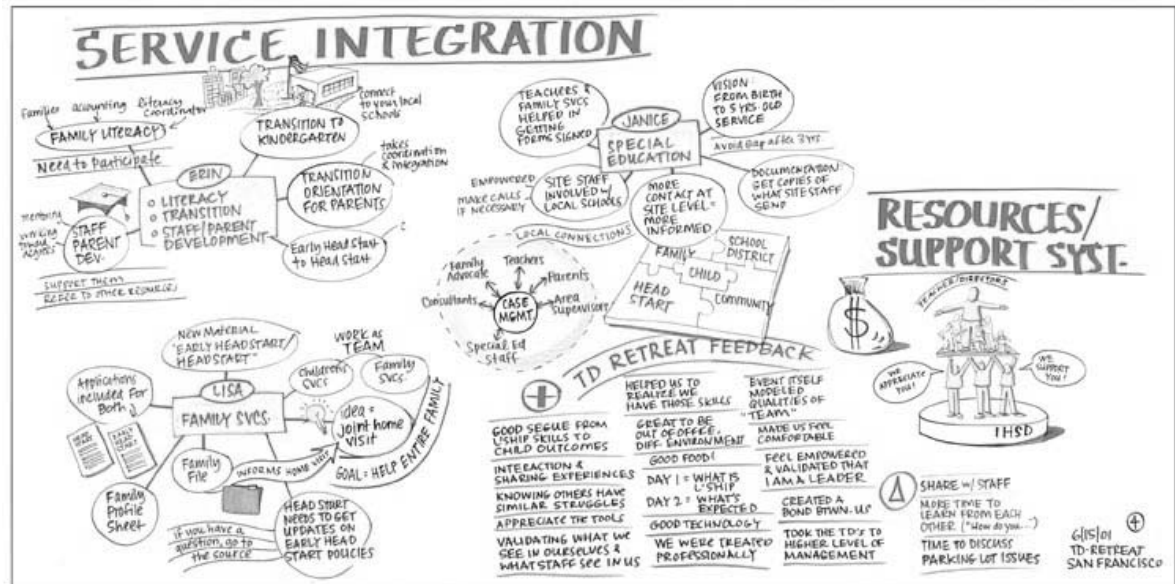
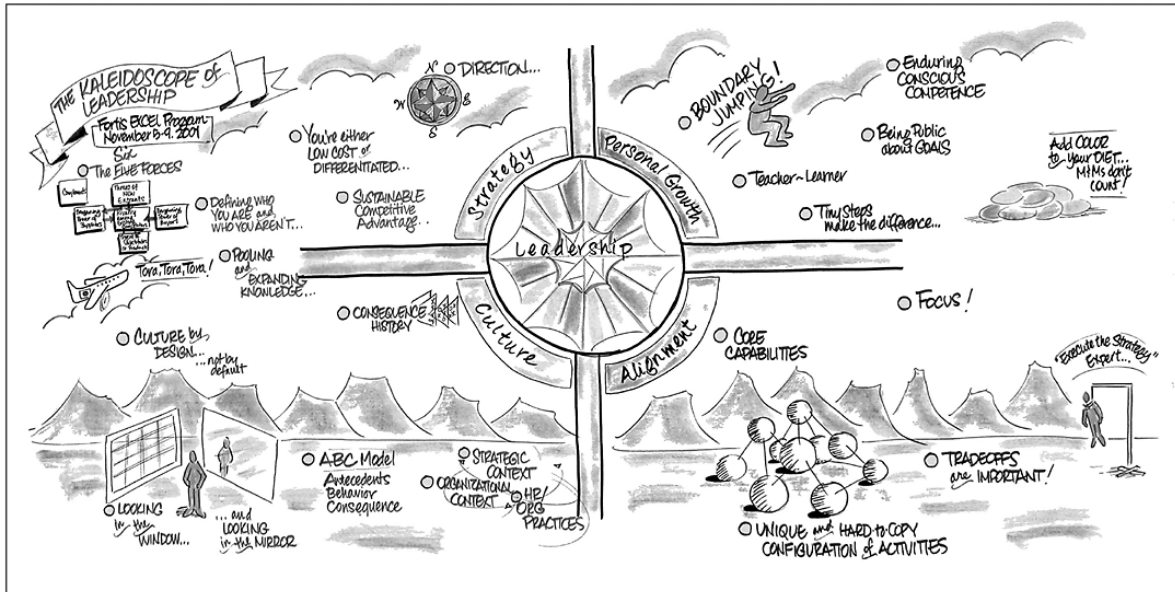


A flipchart page with a black header. Below the header, the text "Tasks to be allocated:" is written in a bold serif font. Below this text, there is a grid. The columns are labeled with names: "Phoebe", "Patrick", "Pauline", and "Peter", written in a serif font and rotated diagonally. The rows are labeled with numbers "1", "2", "3", "4", and "5" in a serif font. The grid consists of 5 rows and 4 columns of empty cells for task allocation.

	Phoebe	Patrick	Pauline	Peter
1				
2				
3				
4				
5				

Using graphics

A way of using drawings is to illustrate what is being said. Everyone can join in this process, demonstrating what they are saying by drawing pictures or lines or graphics on huge sheets of paper displayed around the room, or you can assign the task to a graphic recorder. For more information about this visit www.grove.com, the site of The Grove Consultants International, experts in this field.



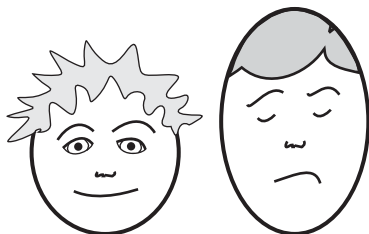
The images above were kindly supplied by Grove Consultants International as examples of their work

Using graphics

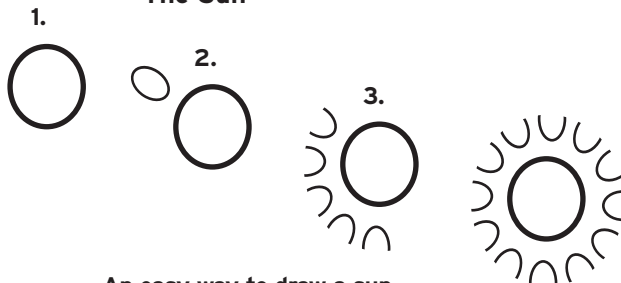
You don't need to be a professional designer or facilitator to introduce some visuals into your meeting.

Try using some of the following simple illustrations:

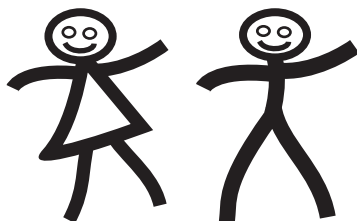
Faces



The Sun

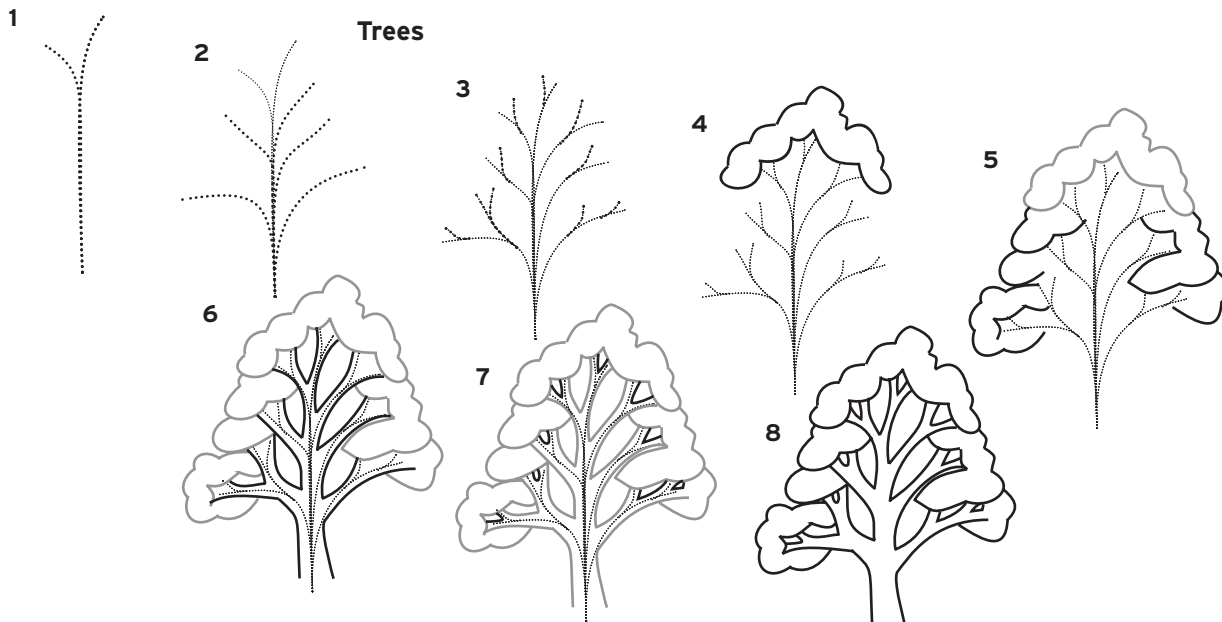


Stick people



An easy way to draw a sun

- 1 Draw a large central circle.
- 2 Add a horseshoe a short distance from the circle facing away.
- 3 Repeat these horseshoes all the way around the edge of the circle.



An easy way to draw trees

- 1 Draw a tall curved Y, as in picture 1, lightly in pencil.
- 2 Still in pencil add a few curved forks branching out from the central 'Y'.
- 3 Add further forks off the new branches, and if you are feeling brave, more forks off these (pencil).
- 4 Using a thicker pen, draw a cloud like shape made



- 5 Draw more bubbly cloud shapes further down the tree, making sure none of the lines cross each other.
- 6 Now begin to fill in the spaces between the large branches by drawing leaf shapes (in pen still) starting at the leaves, with the tip



- near to the trunk. Also draw two bold curves from beside the bottom of the trunk curving up just beneath the bottom branch to join the leaves.
- 7 Repeat the process for the gaps between the smallest branches too.
- 8 Finally, rub out your pencil lines and you should be left with a lovely looking tree.

Templates

These templates can be photocopied or printed out from the accompanying CD-Rom

Template	Page
Session evaluation template (1)	page 136
Session evaluation template (2)	page 137
Session evaluation template (3)	page 138
Session evaluation template (4)	page 139
Agenda quadrants	page 140
Rogues' gallery	page 141
Guess who?	page 142
Raggedy start-up	page 143
Hopes and fears	page 144
Mind the gap	page 145
Spider diagram	page 146
Glad, sad and mad	page 147
Four hoops	page 148
Weighing pros and cons	page 149
Action planning	page 150
Responsibility matrix (RACI)	page 151
Gantt chart	page 152
Making a commitment	page 153
Confronting potential blocks and stops	page 154
Conditions for reaching consensus	page 155

Session Evaluation

Workshop/meeting topic:

Your name:

I thought these things were useful:

I think these things were a problem and here are my suggestions:

In my opinion the session was (please tick):

Very interesting and useful

Somewhat interesting and useful

A waste of my time

Other comments:

Session Evaluation



Session evaluation

Workshop topic:

Presenters:

I appreciated and value these things:

Problems & suggestions:

**Something learned
that I will use:**

**In my opinion
the workshop was:**

- very interesting and useful
- quite interesting and useful
- a drag and useless

Other comments:

Your name (optional): _____

Session evaluation

1 On a scale of 1 (excellent) to 10 (awful), how far did we succeed in fulfilling

1 2 3 4 5 6 7 8 9 10

2 On a scale of 1 (excellent) to 10 (awful), how far did you fulfil your purpose in attending the session?

1 2 3 4 5 6 7 8 9 10

3. Why did you score these questions as you did?

4. What do we need to do next together and individually?

Agenda quadrants: Post your agenda items for our next meeting

1 Urgent and important

2 Not urgent, but important

3 Urgent, but not important

4 Not urgent and not important

1 My name (and picture if you have one)

2 What I am leaving behind to be at this meeting

3 What I find interesting about this session

4 Why I am here

5 What I am bringing to this meeting

6 What would help me contribute to this meeting

Guess who?

Two things I do very well

A personal motto or mantra

One thing I would like to be complimented on

Three individuals who have influenced me most

One thing I would change if I could

Two important goals for the next two years

One word that describes me

HOPES

FEARS

Mind the gap

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= CHANGE
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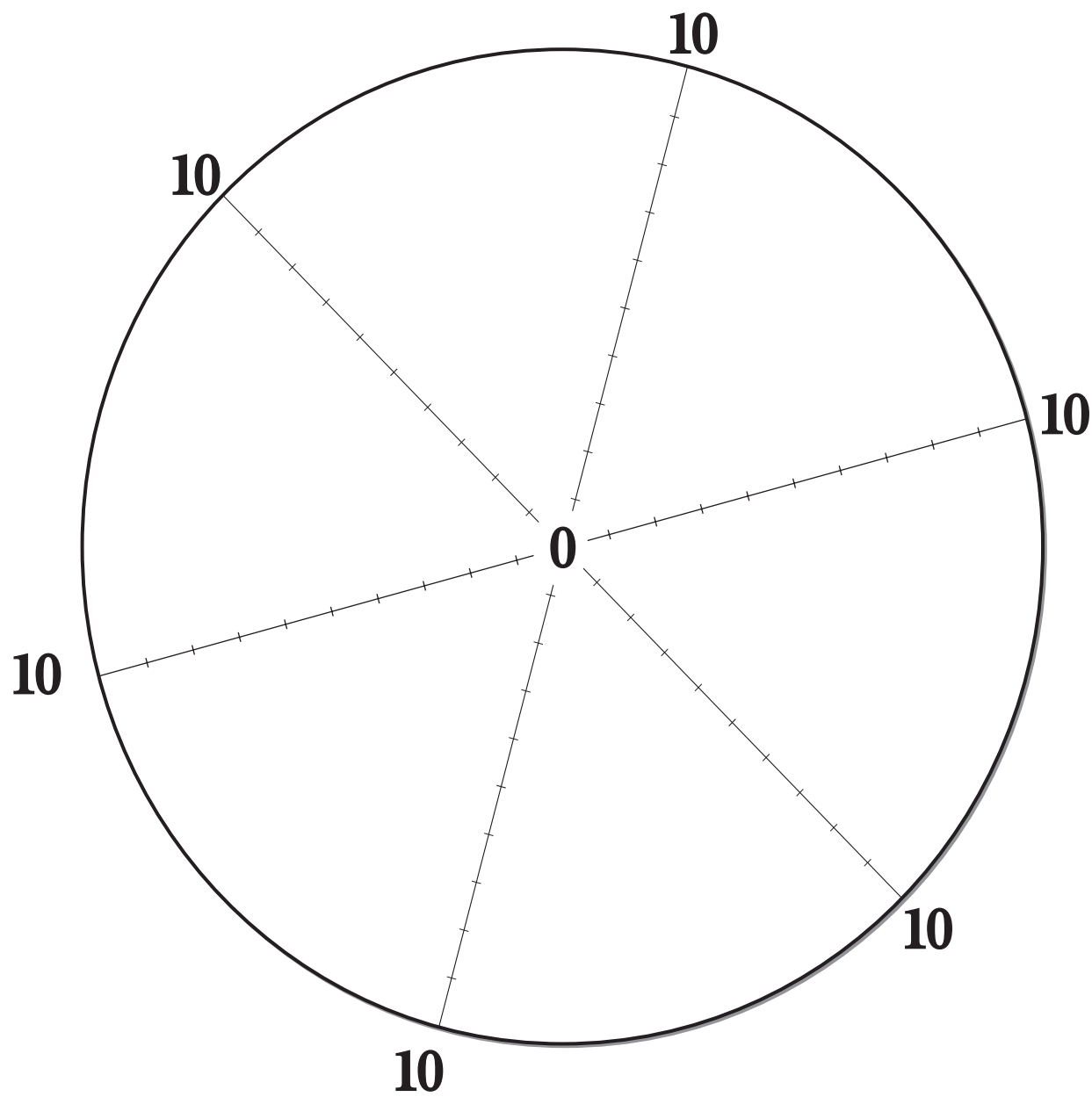
VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= CONFUSION
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VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= ANXIETY
---------------	---------------	-------------------	------------------	--------------------	------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= HOSTILITY
---------------	---------------	-------------------	------------------	--------------------	--------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= DISILLUSIONMENT
---------------	---------------	-------------------	------------------	--------------------	--------------------------

VISION	SKILLS	INCENTIVES	RESOURCES	ACTION PLAN	= FITS & STARTS
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GLAD

SAD

MAD

Weighing pros and cons

Pros

Cons

Needs further discussion

Action planning

Action	By whom	Cost	By when	Who needs to know

Making a commitment

I am going to...

With whom

By when

Feedback Form

COMMENTS ON:

FROM:

If we are to achieve our shared vision and plan we need you to:

STOP

START

KEEP

I can live with this proposal

name:

I would live with this proposal IF... (please complete)

name:

Bibliography and suggested reading

This list includes a wide range of work from organisational and behavioural theory to simple process tools. It is not a comprehensive reading list but will hopefully direct you to additional work of interest.

Argyris, C (1964). *Integrating the individual and the organization*. New York: John Wiley & Sons, Inc.

A classic for those who appreciate organisational development. Reading Argyris can be challenging, but his ideas are precursors of all popular management literature today.

Axelrod, RH (2000). *Terms of Engagement: Changing the Way We Change Organizations*. San Francisco: Berrett-Koehler

Practical principles that challenge change management orthodoxy.

Beer, JE (1997). *The mediator's handbook*. Gabriola Island, B.C.: New Society Publishers.

This book provides excellent tools for preparing mediations. It is well put together as a primer for those who want a step-by-step guide.

Brassard, M (1987). *Memory jogger plus: The seven new tools of management*. Methuen, Mass: Goal/QPC.

The tools described in this book are classic TQM. The processes are clearly described and still very relevant, albeit a bit on the statistical side.

Bridges, W (1991). *Managing Transitions: Making the most of change*. Reading, Mass: Addison-Wesley Publishing Company.

Bridges is the expert when it comes to getting to the heart of change and people. He is very human in his approach and his analogies bring the theory alive.

Covey, SR (1989). *The 7 habits of highly effective people*. New York: Simon & Schuster.

This book was popular for a reason. Steven Covey is able to develop his ideas in compelling and personal ways. It is lightweight in comparison to the organisational development founders such as Argyris or Lewin, but well worth reading.

Csikszentmihalyi, M (1991). *Flow: The Psychology of Optimal Experience*. New York: Harper Perennial.

An inspiring book.

De Bono, E (1992). *Serious Creativity: Using the power of lateral thinking to create new ideas*. New York: Harper.

De Bono's work is unique. His lateral thinking techniques are valuable for those courageous enough to use them.

Fisher, R and S Brown (1998). *Getting Together: Building relationships as we negotiate*. New York: Penguin Books.

The Harvard Negotiating Project created many useful and effective books on conflict negotiation and mediation. It is hard to find books more accessible or useable on the subject.

French, W and CH Bell Jr (1995). *Organisational Development: Behavioural science interventions for organisational improvement (5th ed)*. Englewood Cliffs, NJ: Prentice Hall.

This book is built on organisational behavioural theory and provides excellent information to those looking for a deeper understanding of the subject.

Fisher, R and D Ertel (1995). *Getting Ready to Negotiate: A step-by-step guide to preparing for any negotiation*. New York: Penguin Books.

Another Harvard Negotiating Project product. Excellent and easy to use.

Greenleaf, RK (1996). *On Becoming a Servant Leader*. San Francisco: Jossey-Bass.

When it comes to people willing to live their philosophy, you have to acknowledge Greenleaf. His work is still thought-provoking and philosophically satisfying.

Bibliography and suggested reading

Handy, C (1993). *Understanding Organizations*. New York: Oxford University Press.

This is another classic.

Hartley, EL and N Newcom (eds) (1947). *Readings in Social Psychology*. Troy, Mo: Holt, Rinehart & Winston.

You'll find a good smattering of behavioural and organisational theory in these articles.

Holman, P and T Devane (1999). *The Change Handbook*. San Francisco: Berrett-Koehler

A comprehensive collection of descriptions of large group intervention methods.

Jaworski, J (1996). *Synchronicity: The inner path of leadership*. San Francisco: Berrett-Koehler.

Jaworski is quoted by many of the best seller management writers for good reason. His work is compelling.

Johnson, DW and Johnson, FP (1975). *Joining Together: Group theory and group skills. (5th ed)*. Boston, Mass: Allyn and Bacon.

The brothers Johnson are the best group process apologists ever. No-one else approaches their experience and their ideas on the subjects. They are prolific and all their work is worth reading.

Morgan, G (1993). *Imaginization: The art of creative management*. Newberry Park: Sage.

This work and his *Images of Organisation* are unique and interesting approaches to understanding organisational culture. They stand in contrast to some theorists in their more linear approach, but share much of the anthropological explorations important in the field.

Ott, JS (1989). *Classic Readings in Organisational Behavior*. Belmont, California: Brooks/Cole Publishing Co.

An excellent compilation of organisational theory.

Owen, H (1997). *Open Space Technology - a User's Guide*. San Fransisco: Berrett-Koehler.

A simple and readable explanation of how Open Space meetings work.

Pasmore, W (1988). *Designing Effective Organizations: The socio-technical systems perspective*. New York: John Wiley and Sons.

Pasmore discusses people in organisations and how they react within systems. His work is thoughtful and well researched within organisational contexts.

Pasmore, W (1994). *Creating Strategic Change: Designing the flexible, high-performing organisation*. New York: John Wiley and Sons.

Another Pasmore classic.

Schein, EH (1997). *Organizational culture and leadership, (2nd ed)* San Francisco: Jossey-Bass Publishers.

Schein's work is seminal and should be on the shelf of any serious OD practitioner.

Scholtes, PR (1994). *The Team Handbook: How to use teams to improve quality*. Madison, Wis: Joiner Associates, Inc.

A useful book on teams and quality management techniques in handbook form.

Schwartz, P (1996). *The Art of the Long View: Planning for the future in an uncertain world*. London: Doubleday.

Schwartz writes well on scenario planning.

Senge, PM (1990). *The Fifth Discipline: The art and practice of the learning organization*. New York: Doubleday.

Peter Senge inspired many to think deeply about organisations and systems. His work, predicated on many organisational practitioners, is steeped in theory and yet finds reality in day-to-day organisational behaviour.

Bibliography and suggested reading

Senge, P (1994). *The Fifth Discipline Fieldbook: Strategies and tools for building a learning organization.* New York: Doubleday Dell Publishing Company.

Senge and colleagues attempted to create a process handbook using his disciplines. It contains a mish-mash of philosophy, examples and testimonials that can be confusing; however, there are jewels of ideas hidden on the many pages. You just have to hunt patiently.

Weisbord, MR (1992). *Discovering Common Ground: How future search conferences bring people together to achieve breakthrough innovation, empowerment, shared vision and collaborative action.* San Francisco: Berrett-Koehler.

Weisbord's work is timeless and continues to forward the notion of empowerment, cooperation and equality.

Weisbord, MR (1978). *Organizational Diagnosis: A workbook of theory and practice.* Menlo Park, Ca.: Addison-Wesley.

A Weisbord workbook which proves very useful in assessing organisational culture.

Weisbord, MR (1987). *Productive Workplaces: Organising and Managing for Dignity, Meaning and Community.* San Francisco: Jossey-Bass.

Another classic - his ideas have influenced many.

Wheatley, M (1992). *Leadership and the New Science: Learning about organizations from an orderly universe.* San Francisco: Berrett-Koehler.

Margaret Wheatley's book on chaos theory in the context of organisational behaviour is an important one to read and consider. Her writing is a delight.