

Participatory Leadership Skills

Participant Manual

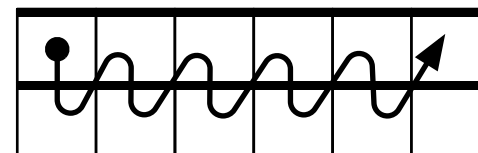
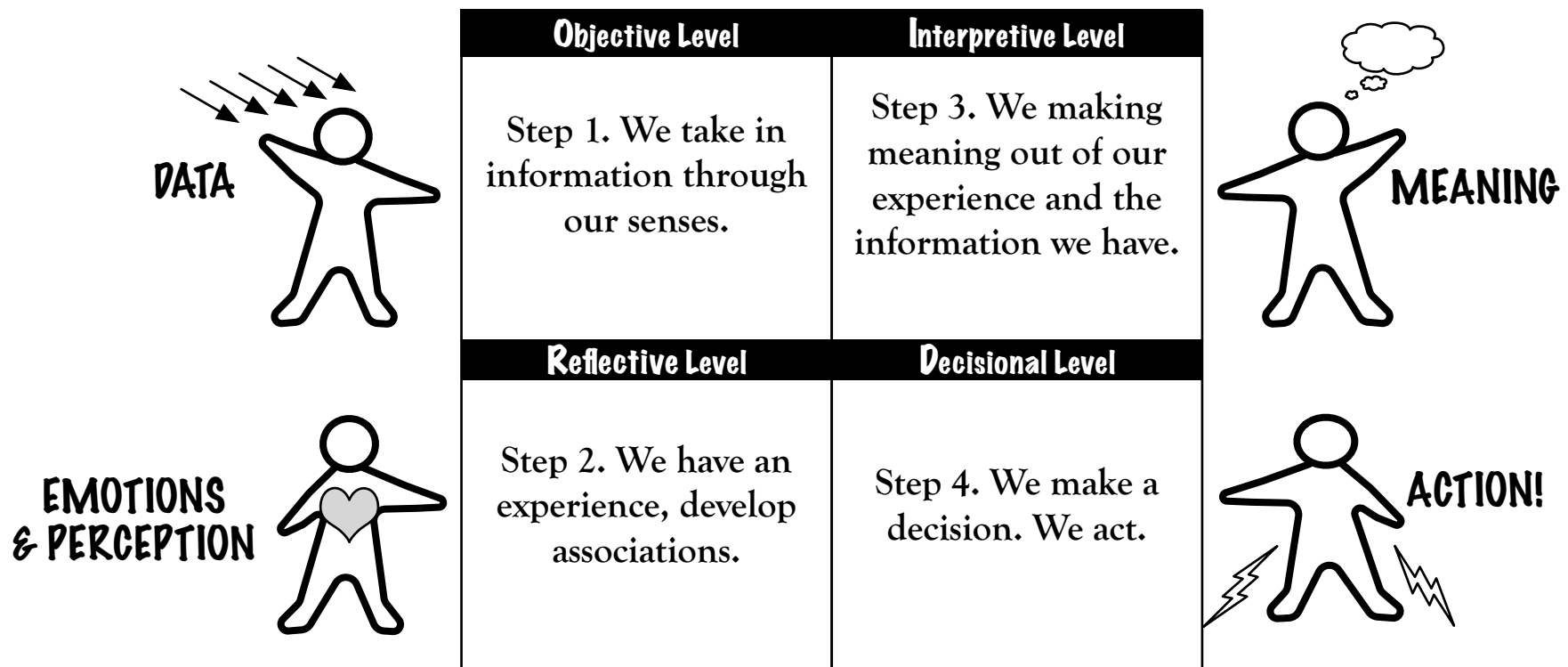


Revision: April 3, 2008 Beta v0.78

The Meta-Method

What's the best way to engage people and groups, and understand how they work? Take them on a journey. →

As we journey through life, we visit these four levels of experience in this order, corresponding to our neurological functions. The cycle can happen in any time frame, from a split second to hours or weeks. It's an ongoing cycle. We can become aware of the cycle any time we choose. When you choose to become aware of it, you can use your awareness of it to guide you. Practically, you can use it as a method, a tool for many things. You'll find it called by many names, and it appears in many disciplines, from facilitation, to therapy, to drivers' ed and teaching. Sometimes this process is referred to as ORID, each letter referring on a level. It's universally human, rooted in our biology. It's a scaleable cycle; the pattern holds for both individuals and groups, which is what makes it valuable and a powerful tool. When you visit all four places, your journey is complete.



And so it goes, on and on...

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The Meta-Method

How do our brains work?

Our marvelous human brain has gone through some adaptations and development over time. Folks who study brain function have developed an understanding of a hierarchy of function based on the ontology of our species. The most primitive part of our brain maintains the basic survival functions: respirations, digestion, circulation etc. Extending out from that more primitive part of our nervous system is the limbic system which adds to our repertoire the capacity for emotion and pattern-recognition. The limbic system is the home of the flight-or-fight response; a "gut level" response to a situation. The learning brain- the cerebral cortex- is the third level and provides the ability to solve problems, use language and abstraction, develop memory and be creative. These three levels directly correspond to the structure of the Meta-method.

There is a kind of neurological "switch" that determines which part, the limbic brain or learning brain is in charge.* This switching seems to occur at one of two times: when emotionally charged up (e.g. fear) or when relaxed. When we're emotionally charged, the cerebral cortex is shut down and we proceed on instinct, relying on the limbic brain. When the threat is removed or we relax, the cerebral cortex is switched back on and creativity and logic return.
Now doesn't that explain a heckuva lot?

In a sense, then, this switching is the major determinant of our primary strategies from situation to situation, cortical vs. limbic, or proactive vs. reactive?
That explains even more!

*Sound smart:
Reticular Activating
System (RAS)



Objective Level	Interpretive Level
<i>First Level.</i> Primitive Brain: Senses and immediate stimulation.	<i>Third Level.</i> Learning, abstraction and problem solving.
Reflective Level	Decisional Level
<i>Second Level.</i> Limbic Brain: Emotion and perception of patterns and relationships	<i>Do we really have a choice about action? Isn't the choice to "not act" actually an action?</i>

And gives me concern for whether or not we'll be able to solve these massive global problems when so many of us live in fear or extremely stressful situations like hunger, war, etc.



The Focused Conversation Method

How can you lead a group conversation that moves a group through its best thinking into action?

In a Focused Conversation the natural process of the Meta Method is slowed down. By the skillful use of questions, the leader helps build a participatory environment that taps the perspectives and expertise of the members of the group. Plan out the conversation in advance, being clear about the purpose of the conversation and the intended experience for participants. Avoid Yes/No questions; instead design questions that elicit open-ending thinking and responses. Questions starting with "Why" sometimes alienate people and prevent them from participating, especially if there is a significant difference in power or stature present in the conversation. Start with an opening statement that captures the purpose; end by thanking people for their participation.

1. What?



2. Gut?



Objective Level

Ask questions that engage the senses. Invite participation. Get out the facts and data.

Interpretive Level

Ask questions to help share and build meaning. Build collective understanding and awareness. Identify options and possibilities

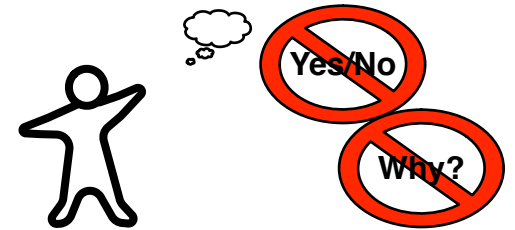
Reflective Level

Ask questions that elicit intuitive associations, initial perceptions and emotional responses. Acknowledge emotions and associations.

Decisional Level

Ask questions that draw out deeper meaning and develop shared agreement. Develop resolve for future action.
This is a good place to write stuff down!

3. So What?



4. Now What?

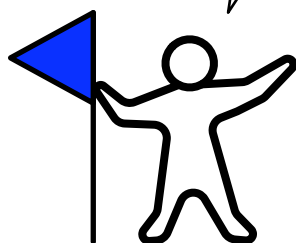


As the leader, don't paraphrase what someone has said; ask the group to do that, if it will help ensure understanding.

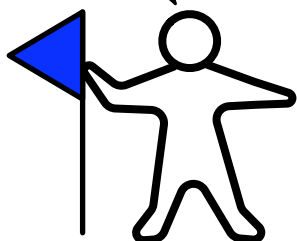
Affirm participation always. Avoid judging the content, unless your role requires it of you.

Planning a Focused Conversation

Before you begin, take a moment to think about what the purpose of the conversation is and what you hope people experience.



Take time to think about the context and what you're going to say to open the conversation



Intention is key to leading a good conversation. Be clear about your intentions and trust the process. Early on while learning how to use the method, it's best to write down your intentions and script which questions you intend to ask to lead the group through each of the four levels. It's okay to over-plan a conversation; in the moment, you'll know which questions to modify or discard. Trust yourself; and trust the process. The group you're leading will do good work.

Intended Purpose		Intended Experience	
This is sometimes called the "Rational Aim."		This is sometimes called the "Experiential Aim."	
Opening	1. WHAT? (Objective)	3. SO WHAT? (Interpretive)	Closing
When you begin leading the conversation, open with a few brief statements about why the group is having the conversation and what we're hoping to accomplish by investing our time and energy in this conversation.	Ask questions that engage the senses. Invite participation. Get out the facts and data. <i>Remember to go around on the first question!</i>	Ask questions to help share meaning. Build collective understanding and awareness. Identify options and possibilities	Thank people for their participation. Remember: always affirm and encourage the group's participation. To the extent you can, keeping your own perspectives out of the conversation will allow you to focus on helping the group advance.
	2. BUT? (Reflective)	4. NOW WHAT? (Decisional)	
	Ask questions that elicit intuitive associates and emotional responses. Acknowledge emotions and associations.	Ask questions that draw out deeper meaning and develop shared agreement. Develop resolve for future action. Write it down!	

Don't summarize. If you're feeling the need to summarize, ask the group to do it.

Don't forget to plan how much time to spend with each level!

Focused Conversation Planning Worksheet

Intended Purpose		Intended Experience	
Opening	1. WHAT? (Objective)	3. SO WHAT? (Interpretive)	Closing
	Add Times! Remember to go around on the first question!		
	2. GUT? (Reflective)	4. NOW WHAT? (Decisional)	

This worksheet and others available free! www.GoodWorkTools.com

Focused Conversation Planning Worksheet- Another Version

Intended Purpose		Intended Experience			
Opening	1. WHAT? (Objective)	2. GUT? (Reflective)	3. SO WHAT? (Interpretive)	4. NOW WHAT? (Decisional)	Closing
Add Times!					

This worksheet and others available free! www.GoodWorkTools.com



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Focused Conversation: Reflecting on a short film

Opening	1. WHAT? (Objective)	3. SO WHAT? (Interpretive)	Closing
Now that we've seen this film, let's have a conversation and reflect on it and understand its implication for our lives. In digging deeper into this film, I hope we can have a few "ahas" about the subject.	Phrases, images, music or pieces of dialogue? [go around on this question.] What character, faces do you remember? What are other scenes do you recall?	What do you think the film-maker was trying to get across? What do you think we can learn from this film? What are implications for our world or work?	Thanks for taking the time to reflect on this film. I hope you enjoyed this film and our conversation.
	2. GUT? (Reflective)	4. NOW WHAT? (Decisional)	
	Where did you feel drawn into the film? Where were your amused or surprised? Where were you inspired? Where were you reminded of something in your own life or work? Why?	What might you differently because you saw this film? Who would you like to see this film? What you do think you'll ponder because of this film?	

Focused Conversation: Reflecting on a workshop

Opening	1. WHAT? (Objective)		3. SO WHAT? (Interpretive)	Closing
Let's take a moment and reflect on our time together.	What are some of the activities we did today? (go around) What was one thing that happened today?	If someone were to ask, what would you say today's work was about? What new insights do you have because of what we did today? Where can you see what we learned being useful?		Thanks for taking the time to reflect on today. And thank you also for your participation today.
	2. GUT? (Reflective)	4. NOW WHAT? (Decisional)		
	Where were you particularly engaged or excited today? Where was it difficult to stay engaged? What did you enjoy most? What did you enjoy the least?	Where do you hope to use what you learned today? What additional ideas would you like to explore next? What is the question your considering as you leave today?		

The Focused Conversation

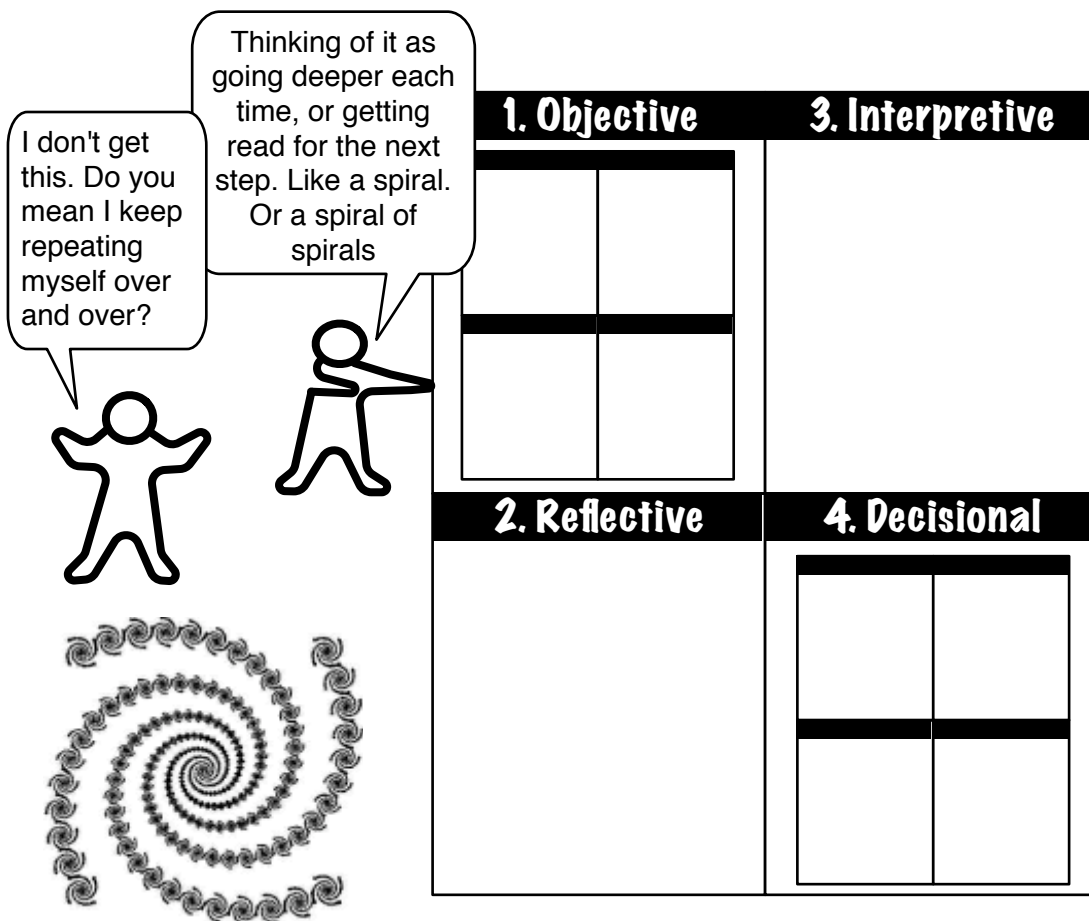
Useful Questions for Each Level

1. What? (Objective)	3. So What? (Interpretive)
What happened? What did you see or hear? Who what there? What are some things we did? What do you notice about this? What facts do we know? <i>(Remember to go around the group on the first question to cultivate participation: e.g. What's one thing you saw or heard?)</i>	What is the significance of this? What options are open to us? What insights are beginning to emerge? What kind of changes would we need to make? How well have we lived up to our expectations? What new vantage point does this give us? What underlies these issues? What are we being compelled to consider?
2. Gut? (Reflective)	4. Now What? (Decisional)
Where were you surprised? Where were you concerned? What was annoying? What was inspiring or hopeful? What was easy or difficult? Where were you engaged or not engaged? When were you bored or excited?	What are we going to do? What are our next steps? Who will do it? By when? What will we do differently next time? What are we really committed to doing? How will we apply what we just learned?

The Consensus Workshop Method

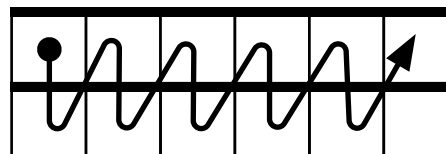
How can you create shared agreement on a complex topic with a group?

Like the Focused Conversation Method, The Consensus Workshop Method is an application of the Meta Method, except it's a little more complex. The Meta Method is scalable, meaning that the principles of it can occur for an individual, a group, a company, a community etc., along any time frame. When we "stack" Focused Conversations, we can get unique applications that help us lead in any situation. The Consensus Workshop Method is an example of strategically stacking the Meta Method and using more than just oral questions to help a group reach consensus on complex topics that have no "yes/no" answer. What's even better, is that the workshop is *fast*!

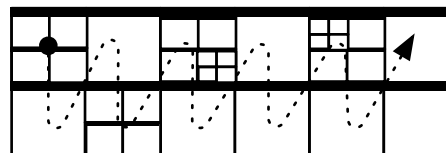


Share-n-Share Alike: www.GoodWorkTools.com

Remember this?



Stacking is like this:



As you pass through each instance, you follow the pattern. In complexity theory, this property is called "scalability." You see it in fractals



In these methods, the Meta Method is the organizing principle that forms a behavioral "fractal" that supports participation.

The Consensus Workshop Method

Basic Design Structure

From the perspective of the meta method, the consensus workshop is a two-deep Meta Method pattern. We start with a focused conversation to open and begin to brainstorm data. Then using a sticky wall or stickies, we develop initial clusters of the brainstormed data, using our perceptive and associative capacities. Next, we name the patterns we see. Finally, in another iteration of the Meta Method, we reflect on what we've just created and decide what to do next. Easy, easy easy.

1. Brainstorm		3. Name	
What?	So What?		
Gut?	Now What?		
2. Cluster		4. Reflect	
		What?	So What?
		Gut?	Now What?

To make it easier to see and use, we pull out the Focused Conversations like this...you'll see what we mean on the next pages.



1. Brainstorm		3. Name	
What?	So What?		
Gut?	Now What?		
2. Cluster		4. Reflect	
What?	So What?	What?	So What?
Gut?	Now What?	Gut?	Now What?

I suppose another way to think of it is as three sequential applications...hmm... How long is the coast of Britain?



Dude, I get the idea you're making this stuff up.



Fake it, 'til you make it.*



Many eyes make bugs shallow: www.GoodWorkTools.com

*Best advice ever from Lynnette Jones.

The Consensus Workshop Method

Fractals!

Something here.

Your Brain, Bazaar: www.GoodWorkTools.com

Thanks to Timothy
for freeing me from
my MS Word table
restraints. I like this
way of thinking,
too.



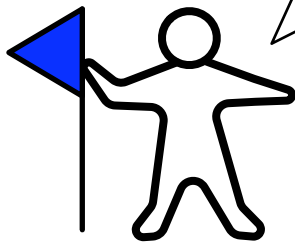
Planning a Consensus Workshop: Focus Question

Because the Consensus Workshop is based on the Meta Method, there are four basic parts to a consensus workshop. Participants brainstorm ideas to answer the Focus Question. Then as a group, they cluster those ideas on a sticky wall (or use sticky notes). Next they work to name the clusters, the patterns they have identified. Finally, they reflect on their product. Any particular part can be emphasized or de-emphasized, depending on your intentions. A workshop could take 45 minutes or a whole day; However most likely, it will take about 1 1/2 to 2 hours, depending on the complexity of the conversation at hand.

Before you begin leading the conversation, spend some time developing the focus question and thinking about what the practical product should be and what the group needs to experience, the Rational and Experiential Aims

The focus question is the question the group will answer by completing the consensus workshop.

As with the Focused Conversation, be clear about your intentions. Along with the intended purpose and experience (aims), develop a clear focus question. Answer the question yourself to ensure you'll get the answer you want. Even better, ask someone to help craft the question.



Example Focus Questions:

What can we do to help our team function effectively?
What do we want to see in place in the 2-3 years?
What's preventing us from accomplishing our vision?
What are the key elements of an ideal solution?
What are the criteria we want to use in our decision?
What information do we want to include in this report?
What do we have to do to make our project really successful?
What are all the things we have to consider in taking on this project?
What are all the questions we have about this topic?

You can use a consensus workshop for many different purposes:

- * **Create a shared vision**
- * **Articulate the key elements of a common understanding**
- * **Develop a framework for action**
- * **Agree on criteria for making decisions**
- * **Discover hopes or dreams**
- * **Develop policy**
- * **Write a book!**

Planning a Consensus Workshop: Materials Check List

Prepping your first few consensus workshop can be intimidating. If you attend to having all your materials prepped, things will go smoother.

Materials Check List:

- ✓ Focus Question written on a flip chart
- ✓ Agenda and time outlines on a flip chart
- ✓ Instruction Cards:
 - Brainstorm 10-12 Answers
 - 3-7 Words Per Card
 - Write Big (not small)
 - One Idea Per Card
 - # of Idea per pair/group
 - 50 half sheets of paper
- ✓ 6-10 symbol cards, half sheets with symbols
- ✓ 10 title cards, half sheets with borders
- ✓ Sticky Wall (www.GoodWorkTools.com)

Focus Question:

What are the key elements of effective teamwork?

Agenda:

- * Opening (10 min)
- * Brainstorm (20 min)
- * Cluster (15 min)
- * Name (30 min)
- * Reflect (15 min)
- * Close

Instruction Cards:

Brainstorm
10-12
ideas

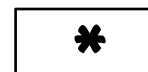
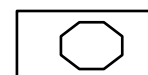
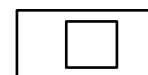
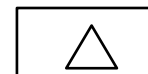
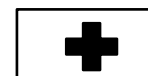
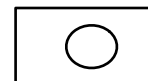
3-7 Words
Per Card

One Idea
Per Card

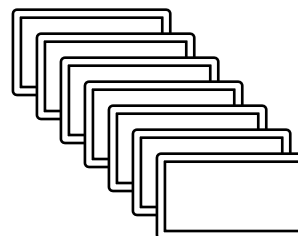
ideas
per team

Write Big
Like This!

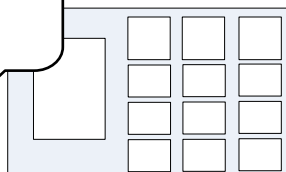
Symbol Cards:



Title Cards:

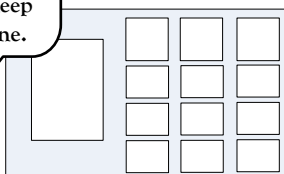


Buy a sticky wall at
www.GoodWorkTools.com
and help keep these
materials free!



Planning a Consensus Workshop

You'll also need a sticky wall. Please support www.GoodWorkTools.com with your purchase. Your support helps develop these materials and keep them free for everyone.



Along with the Focus Question and Agenda, have these instruction cards ready!



Brainstorm
10-12
ideas

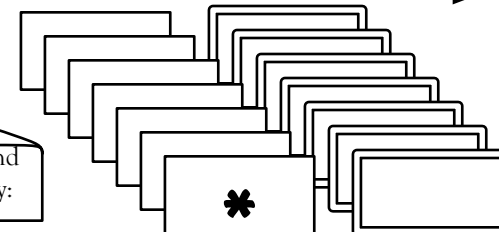
ideas
per team

Write Big
Like This!

One Idea
Per Card

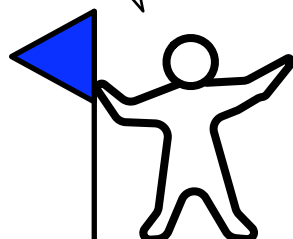
3-7 Words
Per Card

Have 6-10 symbol and
title cards also ready:



Handy Symbols: ○ + △ □ ☆ ○

Take time to think about the context and what you're going to say to open the conversation. Do a complete Focused Conversation.



Focus Question:
Aims:

Open		1. Brainstorm	3. Name	Close
Review the focus question and the process. You should probably have flip charts for these!		Individually list answers to workshop question. Write on half-sheets, individually or as a team. Do math: 35-45 cards total needed. e.g 5 small groups requires 7 to 9 cards each. Pass up first round of cards, the clearest. Get 12-15 cards to start with.	Start with largest cluster Give cluster 3-7 title Repeat for remaining clusters	Always thank the group for their participation. It is an honor for them to trust you with their energy and time. We are all in this together.
		2. Cluster	4. Reflect	
1. WHAT?	3. SO WHAT?	Form 4-6 pairs Get <i>different</i> cards Begin forming larger clusters. Give each cluster 1-2 word tag Label remaining cards with symbol, pass up	1. WHAT?	
Ask a warm up question. Everyone answers	Ask interpretive questions		Read each title	
2. GUT?	4. NOW WHAT?		2. GUT?	
Ask questions to illicit perceptions & experience	Ask to brainstorm 10-12 ideas		Illicit perceptions & experience	
			3. SO WHAT?	
			Discuss implications	
			4. NOW WHAT?	
			Ask for next steps	



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Consensus Workshop: Demonstration

Focus Question: What are the key elements of fulfilling work?

Aims: Articulate an understanding of fulfilling work; increase mutual understanding and build positive team culture.

Open		1. Brainstorm	3. Name		Close		
Let's take an hour or so and explore the topic of work. Let's talk about fulfilling work and help build our understanding of what our team values in work. I hope we can use this opportunity to build on our positive team culture. We're going to focus on the question: what are the key elements of fulfilling work. We're going to use the consensus workshop method to explore the topic.		Now as a pair, review your lists together and come up with X ideas together, incorporating both of your perspectives. Write cards like this (demo) Each pair should come up with X# of ideas. Please pass up your X clearest ideas from each pair	What phrase would be most descriptive of all these ideas? What title would be inclusive of all the insights here? What could we name this cluster?		Thank you for your participation. I look forward to seeing how what we've learned today helps our team.		
		2. Cluster		4. Reflect			
		1. WHAT?	3. SO WHAT?	Let's form a few pairs (4-6) Ok, please send up X cards that are different from what's already up here. Let's start forming larger clusters. Please label the remaining cards and send them up.		1. WHAT?	3. SO WHAT?
		Let's go around and name one time when you really enjoyed your work or a task.	How did these positive experiences influence you personally?			Read the cards.	Breakthroughs? New Insights? Left out? Importance? Learned?
		2. GUT?	4. NOW WHAT?			2. GUT?	4. NOW WHAT?
What was enjoyable about these experiences?	Ok, let's take the next couple minutes and brainstorm 10-12 answers to this question.		Surprising? Exciting? Intriguing? Uneasy? Uncomfortable?	Practical next steps? How can we use our insights in our daily work?			

Consensus Workshop: Step by Step Photos

Brainstorm: first round of cards: 12-15 total



Cluster: Add tag names as clusters form.



Cluster: Form 4-6 pairs



Cluster: Label and send up remaining cards.



Cluster: Pass up different cards



Cluster: Find homes for left overs.



Cluster: Finalize pairs



Name: Begin with largest column.



Context 	Notes ❖ The sticky notes (cards) will be in place when you arrive ❖ 8 symbols will be across the top of the wall space ❖ 2 symbol cards will be available if you need them
Brainstorm 	Notes ❖ Affirm participation ❖ Use instruction cards to explain how to format cards
Cluster	Notes

Cluster	Notes
	❖ Make pairs ❖ The group will want to make larger clusters: Tell them to hold off: “by making only pairs right to refine our insights. If things really do go together, we’ll get a chance to do that later. For make only pairs.”
	❖ Ask for a second round of cards: 1-2 ideas from each pair that is most different from what is a

it now, it is a chance now, please let's
already up.

Cluster (continued)	Notes
	❖ Continue making pairs until you've gotten 5-8 columns (clusters.)
	❖ Help the group find places for “orphans” that make sense. ❖ Form larger clusters (columns) when it is apparent that the group has run out of insights into new relationships forming ❖ Go until all or nearly all of the cards have a column they belong in.

The image shows a green chalkboard with a grid of 12 columns and 4 rows of sticky notes. Each column is headed by a symbol: a flower, a triangle, a spiral, a diamond, a square, a circle, a star, and three slashes. The sticky notes contain handwritten text, some of which is crossed out or corrected. The bottom right corner has three additional sticky notes with more text.

Flower	Triangle	Spiral	Diamond	Square	Circle	Star	///
Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash
Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash
Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash	Wash Wash

Additional sticky notes at the bottom right:

- Wash
Wash
- Wash
Wash
- Wash
Wash

- ❖ When the group has created the columns, have them write the column's symbol on the cards.
- ❖ Invite group members to place the cards on the wall where they belong.
- ❖ Review the additions with the whole group. Do they fit there?



n their remaining cards

Naming



Notes

- ❖ Read all cards aloud beginning with the largest cluster.
- ❖ **Name each cluster:**
- ❖ Begin with the cluster with the largest number of cards. Talk through it
 - What 3-7 words describes cluster?
 - What title is most inclusive of all ideas?
 - What title best answers the focus question?
- ❖ Continue to refer to the focus question.

- ❖
- Final image: All Columns Have Title**



--

with the group. Ask questions:

--

Consensus Workshop: Practice

Focus Question: What are the key elements of a perfect vacation?

Aims: Articulate what we believe would make a perfect vacation; have fun!

Open		1. Brainstorm	3. Name		Close	
Something like: Let's take an hour or so and explore the topic of vacation. I hope we can have fun taking on this light-hearted subject! We're going to focus on the question: What are the key elements of a perfect vacation? We're going to use the consensus workshop method to explore the topic. (Review process)		Now as a pair, review your lists together and come up with X ideas together, incorporating both of your perspectives. Write cards like this (demo) Each pair should come up with X# of ideas. Please pass up your X clearest ideas from each pair	What phrase would be most descriptive of all these ideas? What title would be inclusive of all the insights here? What could we name this cluster?		Something like: Thank you for your participation. I look forward to this vacation.	
		2. Cluster		4. Reflect		
		1. WHAT?	3. SO WHAT?	1. WHAT?		3. SO WHAT?
Let's go around and tell briefly about an enjoyable vacation experience. Where were you?	What contributed to making your experience enjoyable?	Let's form a few pairs (4-6) Ok, please send up X cards that are different from what's already up here. Let's start forming larger clusters. Please label the remaining cards and send them up.	(Read the cards.)	Breakthroughs? New Insights? Left out? Importance? Learned?		
2. GUT?	4. NOW WHAT?		2. GUT?	4. NOW WHAT?		
What was most exciting or enjoyable?	Ok, let's take the next couple minutes and brainstorm 10-12 answers to this question.		Surprising? Exciting? Intriguing?	Practical next steps? How can we use our insights in our next vacation?		
10 Minutes		15 Minutes	20 Minutes			

Consensus Workshop: Documenting the Results

Keep track of who has contributed. Ensure that you've got enough context in your document for those who weren't there to understand

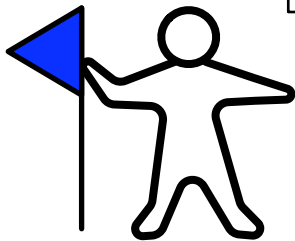
WHAT ARE THE KEY ELEMENTS OF FULFILLING WORK?

18, 2008 Who: Robby, Rachel, Julie, Erica, Kristen, Kristen, Waid, Anika, Cara

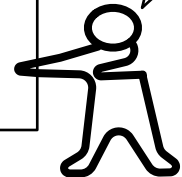
Ideas	EXIBLE, SUPPORTIVE WORKS ENVIRONMENT	ADEQUATE FINANCIAL SUPPORT AND RESOURCES	PASSION AND PURPOSE	GOALS AND EXPECTATIONS GUIDED BY THE MISSION	OPPORTUNITIES FOR PERSONAL AND PROFESSIONAL GROWTH AND DEVELOPMENT
	- Facilitate group process (not doing it all) - Collaborative work environments - Process vs. outcome - Room to breathe! - Empowerment - Flexibility - Creativity encouraged and supported - Teamwork (team buy-in and participation) - Persistence in the face of obstacles - Recognition of a job well done - Constructive and celebrative feedback	- Adequate resources - Budget \$\$\$ - Division of work/personal possible - Funding appropriate for working and living well	- Work fits your passion - Passionate at work - Discontent with current situation - Makes a positive difference - Mentally stimulating - Giving your best - Work feels purposeful - Motivation (work motivates and inspires you) - Appreciative audience - Vortex of Experience, Knowledge, and Wisdom (concentric circles)	- A timeline with milestones and goals - Clear expectations - Being aware of what has been done - Work stays connected to mission - Systems in place for tracking progress - Divergent/creative/new ideas and thinking	- Opportunities to be both a learner and an expert - Opportunity to learn new skills - Opportunities for growth/advancement - Mentor / guide to track progress and problem solve - Room to fail - Professional development opportunities - Space for creative exploration - Opportunities for personal and professional growth - Flexibility to follow your interests - Time to reflect

Next steps: Robby facilitates conversation at all-staff meeting. Kristen writes article for staff news letter.

...and it's good to capture next steps



Good documentation makes remembering the meeting easier.
Good documentation also helps those who weren't there and those who were to share their knowledge and reflections.

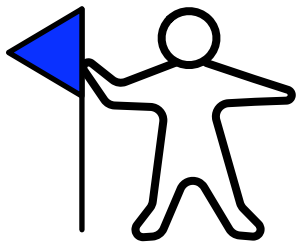


Consensus Workshop: Documenting the Results

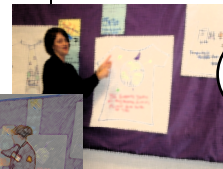
Documenting a consensus workshop is quite easy. In a word processing program, simply use a table, like this one.

Honor the group's work with good, clear documentation.

Also, get the documentation out as soon as possible. This makes a huge impact on groups; it says "your work really matters" and it helps sustain the momentum of the meeting.



WHAT ARE THE ELEMENTS OF A PERFECT VACATION? MARCH 19 TH , 2008					
Consensus	GOOD LOGISTICS & PLANNING	GOOD TRAVEL COMPANIONS	GOOD ATMOSPHERE	GREAT EXPERIENCES	GREAT FOOD
Ideas	• Comfortable travel • Details well planned • Not being solely responsible for what goes on • Finances taken care of • Something has to be forgotten • Toys & gadgets • Everything taken care of at home • Having \$\$ to take the vacation • Ease of logistics & planning • Fits within budget • Essential pieces planned in advance • Stuff taken care of back home	• Being with friends or family • People you enjoy being with • With kids • Away from kids • Family/close friends • Being with people you enjoy	• Mix of relaxation & activities • Brings in the here and now • Time for reflection • Work + Luxury • Time to Re'create' • Time for relaxation • Relaxing environment	• Fun, silly activities (planned & unplanned) • Cooperating, good weather • Learning something new • Heat/Weather • Healthy-not being sick • Visiting a great location • Good weather • Mix of relaxation & activities • Brings in the here and now • Time for activities for the kids • Getting off the beaten path • Trying new things • Experiencing the "local" customs	• Access to really good food • Good food • Exquisite food • Great food



Pictures are worth a thousand words



Pictures of the group and their work, that is..



Consensus Workshop: Practice

Focus Question: What are effective ways to engage youth?
Aims: Articulate what we believe would engage youth; Reflective

Open		1. Brainstorm	3. Name		Close
Something like: Let's take an hour or so and explore the topic of engaging youth. I hope we can draw from our experience and learn from one another. We're going to focus on the question: What are effective ways to engage youth? We're going to use the consensus workshop method to explore the topic. (Review process)		Now as a pair, review your lists together and come up with X ideas together, incorporating both of your perspectives. Write cards like this (demo) Each pair should come up with X# of ideas. Please pass up your X clearest ideas from each pair	What phrase would be most descriptive of all these ideas? What title would be inclusive of all the insights here? What could we name this cluster?		Something like: Thank you for your participation. I hope we're able to find ways to continue learn about effective ways to engage youth.
2. GUT?	3. SO WHAT?	2. Cluster	4. Reflect		
What was your experience of being engaged?	What contributed to making your experience engaging?	Let's form a few pairs (4-6) Ok, please send up X cards that are different from what's already up here. Let's start forming larger clusters. Please label the remaining cards and send them up.	2. GUT?	3. SO WHAT?	
1. WHAT?	4. NOW WHAT?		Surprising? Exciting? Intriguing? Confusing? Unclear?	Breakthroughs? New Insights? Left out? Importance? Learned?	
Tell briefly about a time in your own adolescence when you felt really engaged?	Ok, let's take the next couple minutes and brainstorm 10-12 answers to this question.		1. WHAT?	4. NOW WHAT?	
			(Read the cards.)	Practical next steps? How can we use our insights in our work?	
10 Minutes		15 Minutes	20 Minutes		

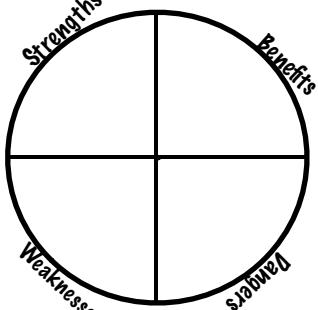
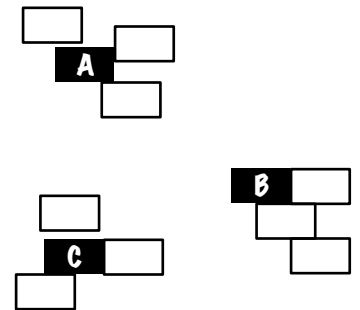
WMS Visioning Consensus Workshop: What do we want to see in place in the next 2-3 years at WMS to advance academic achievement?

Context :00-:15	Brainstorm :15-:35	Cluster :35-1:00	Name 1:00-1:20	Reflect 1:20-1:30 (90 minutes total)
Welcome and thank participants. <i><<Insert key introduction message, reviewing intended results>></i> Review: Promise to Stakeholders Card Review: Focus Question Card Review: Consensus Workshop Card <i>Any questions?</i> <i>Opening question 1</i> <i>Opening question 2</i> <i>Now we are going to brainstorm specific actions to answer this question. [Focus Question]</i> 	<i>Briefly work individually in silence to come up with 10-12 ideas that answer this question. You'll have 3-4 minutes. Brainstorm onto scratch paper</i> <i>Now, in pairs share ideas. You'll have 5-6 minutes.</i> <i>Now, please put your ideas onto sticky notes, like this:</i> Review posted model cards. <i>Please send up your 2 clearest ideas.</i>  <i>Now we are going to move to clustering, which will allow us to see the relationships between all these ideas on concrete action recommendations.</i>	Work with the group to make 5-8 pairs of like cards and place each pair under one of the symbol cards.  Leave any cards that do not fit as pairs to the side for later <i>Please send up one or two more cards that is most different from what is currently up here.</i> After 5-8 pairs, make larger columns. Find ways to incorporate all cards. <i>Please label your remaining cards with the symbol and put them on the wall.</i>  Review added cards:. Ask do they fit?	<i>Now we are going to name each cluster, which will allow us to form a consensus on our concrete action recommendations to the School Board.</i> Review: Focus Question Card Name each cluster: Begin with the cluster with the largest number of cards. Review cards. Talk through it with the group. Ask questions: <i>What title best represents this group's intention in answering this question?</i> <i>What is this column about?</i> <i>What can we say about these ideas that integrates them?</i> Work to generate 3-7 word titles, with action in them. Review example title. Write cluster name on title card – replace symbol card with title card. Repeat for each column. 	 Review: Focus Question Read All Title Cards Aloud Celebrate! Using Reflective Conversation Table Tent, reflect with the group. Everyone should answer the first question. <i>Closing thanks and <<key thank you messages>></i>

Action Planning

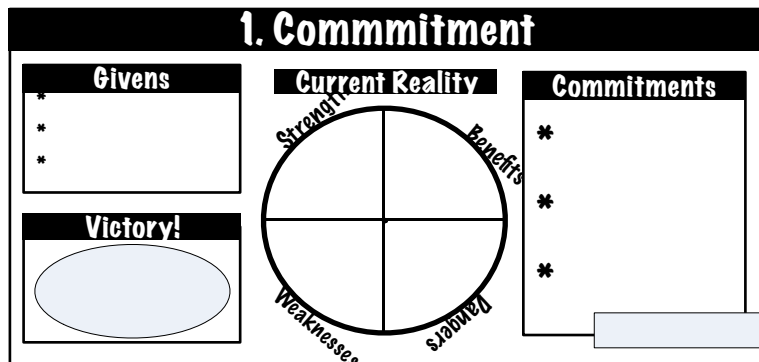
Action Planning is used for shorter term planning where the group has not yet fully determined its commitments or who is doing which specific tasks. This method is a good way to get a group to form an actionable plan quickly. Use for for things like: organizing a conference, developing a community celebration, outlining a project, launching a new product or service.

Like darn near everything, Action Planning is a repeating pattern of the Meta Method. It consists of four phases (you might guess) and in a pinch could be done in about an hour, more thoroughly in two. The phases are: Commitment, Key Actions Workshop, Calendar & Coordination, and Reflection.

1. Commitment	3. Calendar and Coordination								
Givens * * * Current Reality  Commitments * * * Victory!	Jan * Feb * Mar A B C								
2. Key Actions Workshop	4. Reflection								
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: black; color: white;"> <th style="width: 50%; padding: 5px;">1. WHAT?</th> <th style="width: 50%; padding: 5px;">3. SO WHAT?</th> </tr> </thead> <tbody> <tr> <td style="height: 60px;"></td> <td style="height: 60px;"></td> </tr> <tr style="background-color: black; color: white;"> <th style="padding: 5px;">2. GUT?</th> <th style="padding: 5px;">4. NOW WHAT?</th> </tr> <tr> <td style="height: 60px;"></td> <td style="height: 60px;"></td> </tr> </tbody> </table>	1. WHAT?	3. SO WHAT?			2. GUT?	4. NOW WHAT?		
1. WHAT?	3. SO WHAT?								
2. GUT?	4. NOW WHAT?								

Action Planning - Commitment

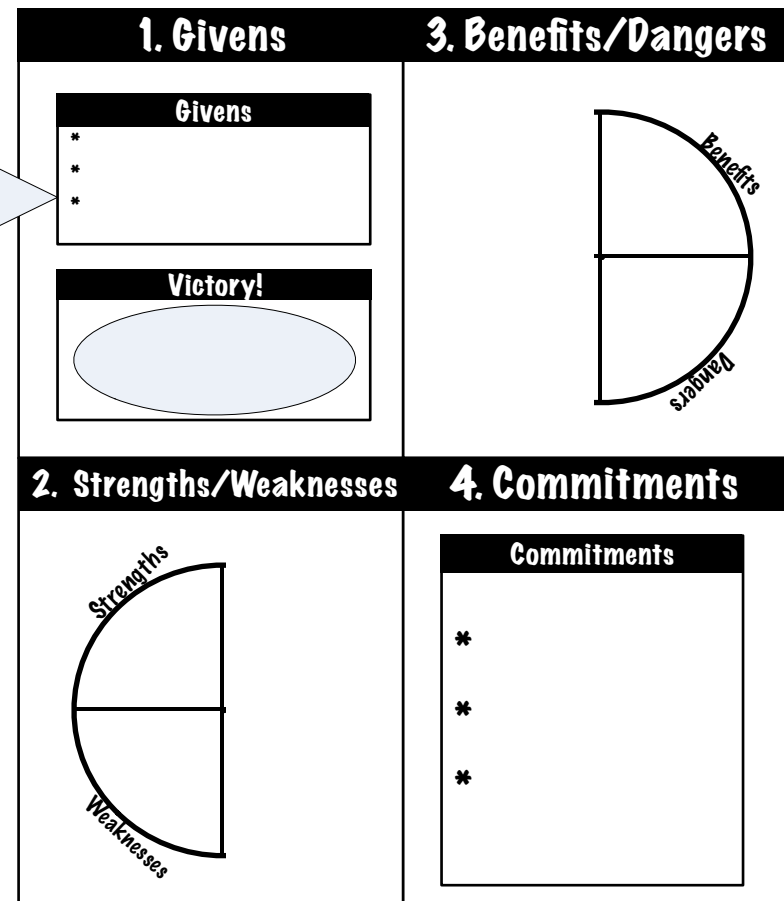
In the first phase of Action Planning, the group is lead through an iteration of the Meta-method.



Each of these parts can be a single flip chart, or you can be more complex if you choose.

The key questions for each step are something like:

- 1a) What have we already decided? What is already a given?
- 1b) What would we want to be able to say about our event/project? What do we associate with a job well-done?
- 2) What are our current strengths/weaknesses? (Internal glance.)
- 3) What are the benefits/dangers of doing this work well? (Implications.)
- 4) Given our Victory and our current reality, what can we realistically commit to doing?



Participatory Strategic Planning

1. Environmental Scanning	3. Priorities & Milestones
<i>What's going on?</i>	<i>What's most important for us to accomplish?</i>
2. Evaluating & Planning	4. Implementation
<i>What do we feel we can focus on?</i>	<i>Who's going to do what?</i>

Step 1: Establish Focus question for plan:

How will we become the best in our business?
How will we deal with the current economic reality
and still hold true to our mission?
What is it going to take for us to forward our field?

Ugly DRAFT!

Participatory Strategic Planning

1. Environmental Scanning	
1. Collecting	3. Analyzing
2. Synthesizing	4. Forwarding

Rational Aim:
Collect, Synthesize and Analyze Relevant Data
Experiential Aim:
Satisfaction.
We've done enough

2. Evaluating & Planning	
1. Practical Vision	3. Strategic Directions
2. Obstacles	4. Implementation

Rational Aim:
Imagine an alternative future, understand what's preventing us, come up with some strategies and start moving.
Experiential Aim:
Integrity with values.
We're the right people for the job. Now is the time, and we are the people.

Rational Aim:
Understand the decisions we've made, assess our capacity, set some priorities and learn from our first steps.

Experiential Aim:
Confidence and coherence. Here is the path and we're on it together.

3. Priorities & Milestones	
1. Reviewing	3. Establishing Milestones
2. Assessing	4. Reflecting

Rational Aim:
Review our progress and our new capacities, adjust our intentions and learn from our work.
Experiential Aim:
Energy and connection. Success.
We're working the plan together.

4. Implementation	
1. Reviewing	3. Adjusting
2. Assessing	4. Reflecting

Participatory Strategic Planning

2. Evaluating & Planning

1. Practical Vision

*Consensus Workshop Focus Question:
What do we want to see in place in the next 2-3 years?*

3. Strategic Directions

*Consensus Workshop Focus Question:
What are substantial, innovative actions that deal with the
Obstacles and advance our Practical Vision?*

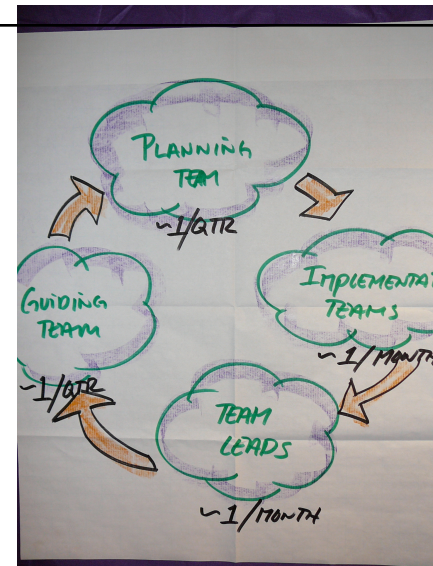
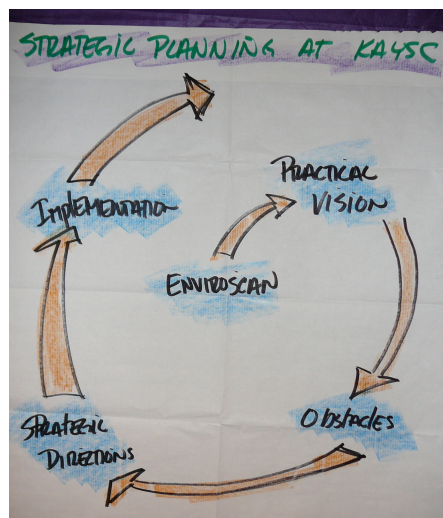
2. Obstacles

*Consensus Workshop Focus Question:
What prevents us from realizing our Practical Vision?*

4. Implementation

*Focus Question:
Who is going to do what by when?*

Participatory Strategic Planning



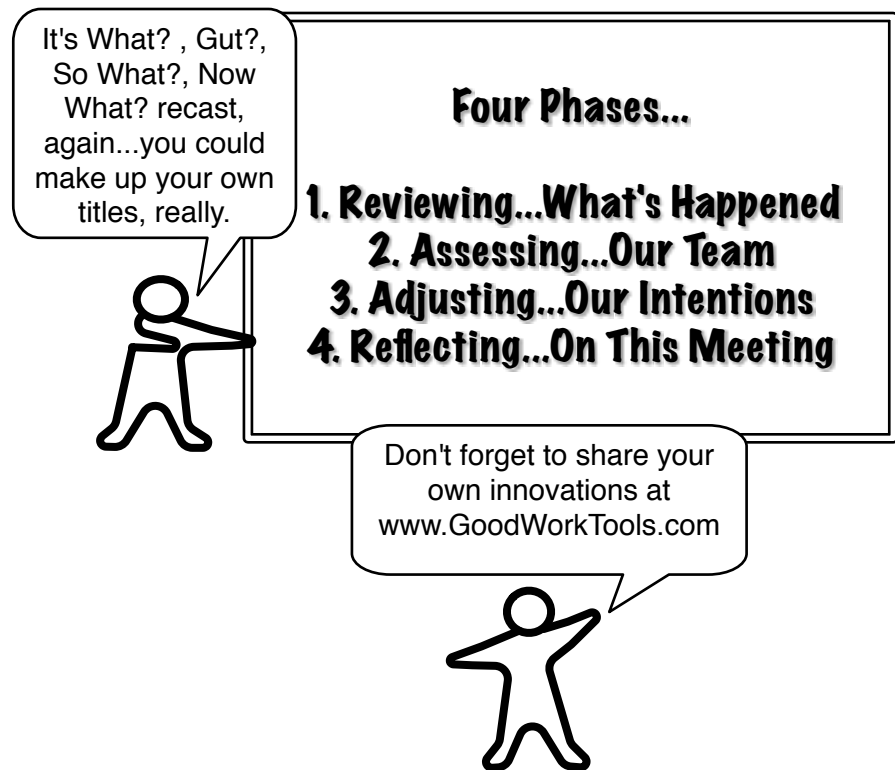
Implementation Planning

In Implementation Planning, the milestones for the group have already been determined. This usually happens through another planning process, for example, strategic planning. Action Planning is used for shorter term planning where the group has not yet determined its commitments.

Like the Consensus Workshop, Implementation Planning is a repeating pattern of the Meta Method. It consists of four phases (you might guess) and could take anywhere from an hour to several meetings. The phases are: Reviewing, Assessing, Adjusting and Reflecting. Again, it's scaleable.

1. Reviewing		3. Adjusting	
1. WHAT?	3. SO WHAT?	1. WHAT?	3. SO WHAT?
2. GUT?		4. NOW WHAT?	

2. Assessing		4. Reflecting	
1. WHAT?	3. SO WHAT?	1. WHAT?	3. SO WHAT?
2. GUT?		4. NOW WHAT?	



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Implementation Planning - 2 Hour Team Meeting

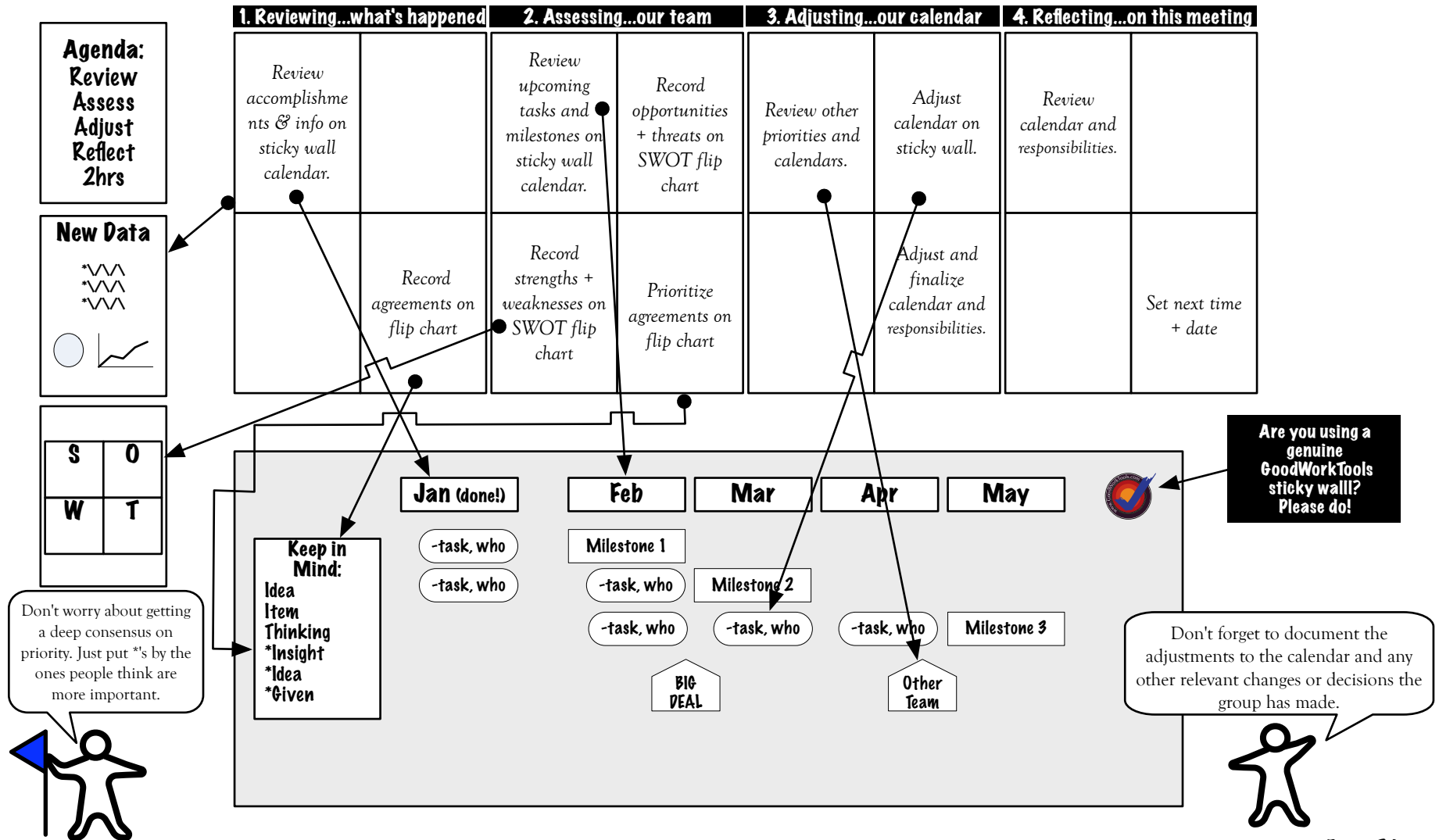
Below is a prototypic Implementation Planning meeting of approximately 2 hours. The milestones and objectives of the group have already been established. As with all of these methods, any part of this process could be expanded or compressed to meet the intentions and the needs of the group.

Intended Purpose: Adjust and update our plan. *Intended Experience:* Reflective and Celebratory. Affirming.

1. Reviewing...what's happened		2. Assessing...our team		3. Adjusting...our calendar		4. Reflecting...on this meeting	
1. What?	3. So What?	1. What?	3. So What?	1. What?	3. So What?	1. What?	3. So What?
What is one important thing that has happened or we've accomplished? (Go around the group.) <i>Review accomplishments on sticky wall calendar. Review relevant information. Review goals and intentions.</i>	What's the significance of what has happened and what's going on? How has our work and accomplishments advanced or not advanced our charge?	<i>Review the intended upcoming tasks and milestones on sticky wall calendar.</i>	What are the implications of our intentions for other work? What are our opportunities and threats external to our team right now? (OT) <i>Record opportunities + threats on SWOT flip chart</i>	What priorities and calendars we need to attend to? <i>Review other priorities and calendars.</i>	How do we adjust our calendars, intentions and responsibilities? Why? What adjustments do we propose? What are our insights? <i>Adjust calendar on sticky wall.</i>	<i>Review calendar and responsibilities.</i> What is one thing we've accomplished in this meeting? (Go around group.)	What will sustain the momentum we've generated? What do we need to do to ensure we're moving along and communicating well?
2. Gut?	4. Now What?	2. Gut?	4. Now What?	2. Gut?	4. Now What?	2. Gut?	4. Now What?
Where do we feel we have momentum? Where do we feel a drag?	What should we keep in mind as we adjust our plans? <i>Record agreements on flip chart</i>	Given what we intend to accomplish, what are our team's own strengths and weaknesses (SW) right now? <i>Record strengths + weaknesses on SWOT flip chart</i>	Given our SWOT, How will we prioritize what we need to keep in mind? What's most important? Less important? <i>Prioritize agreements on flip chart</i>	Given what we've been discussing, what initial perceptions or associations are emerging?	<i>Adjust and finalize calendar and responsibilities.</i>	Where are we most satisfied or dissatisfied with what we did today? Clear or Uncertain? High point or low point of today's meeting? Where did we have a breakthrough?	How are we going to check in before our next meeting? What else do we need to do to ensure that we're successful? When is our next meeting and what in particular will we need to attend to? <i>Set next time + date</i>
15 min		15 min		75 min		15 min	

Implementation Planning - 2 Hour Team Meeting Materials

As with everything, ensure that you're prepared with the right materials and data for the group.
Remember it's an honor to lead a group; don't waste their time.



Trend Wave Worksheet: Trends, Ideas, Practices, Paradigms



Boundary	Emerging	Established	Dying
<i>New horizons</i> <i>"Bleeding edge"</i> <i>Radical ideas</i>	<i>Idea whose time has come</i> <i>Experimental ideas</i> <i>Support beginning to emerge</i>	<i>Status quo</i> <i>"Tried and True"</i> <i>Hard to dislodge</i>	<i>Time has gone</i> <i>Outdated</i> <i>Being replaced</i>

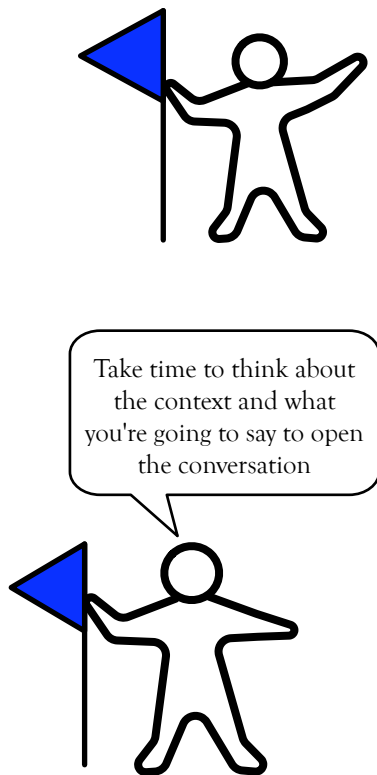
Adapted from M. Hansen et al.



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Planning a Participatory Event

Intention is key to leading a good conversation. Be clear about your intentions for each level of the meta method. Early on while learning how to use the method, it's best to write down your intentions and script which questions you intend to ask to lead the group through each of the four levels. It's okay to over-plan a conversation; in the moment, you'll know which questions to modify or discard. Trust yourself; and trust the process. The group you're leading will do good work.



Objective Level	Interpretive Level
Objective Aim: What new knowledge or information will participants have?	Interpretive Aim: What significance will this conversation have to participants? What new meaning will it create?
Reflective Level	Decisional Level
Reflective Aim: What will participant's experience be?	Decisional Aim: What decisions will participants make? What actions will they take?

Methods Templates

Consensus Workshop Planning Worksheet

Focus Question: Aims:					
Open		1. Brainstorm	3. Name		Close
		2. Cluster	4. Reflect		
1. WHAT?	3. SO WHAT?		1. WHAT?	3. SO WHAT?	
2. GUT?	4. NOW WHAT?		2. GUT?	4. NOW WHAT?	

Implementation Planning - 2 Hour Team Meeting

Intended Purpose:		Intended Experience:	
1. Reviewing...what's happened		2. Assessing...our team	
1. What?	3. So What?	1. What?	3. So What?
2. Gut?	4. Now What?	2. Gut?	4. Now What?
15 min		15 min	
3. Adjusting...our calendar		4. Reflecting...on this meeting	
1. What?	3. So What?	1. What?	3. So What?
2. Gut?	4. Now What?	2. Gut?	4. Now What?
75 min		15 min	

Be a co-developer!

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All of the materials for this course along with many other participatory tools are available online, for free at www.goodworktools.com.

These tools and methods will only be developed and improved with user input and adaptation. This manual was designed using Omnigraffle. The stencils and original files are available at the website for your use. Go wild! Share wildly!

COMING SOON! Participant Survey

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COMING SOON! Fax

Believe it or not, we even have a fax machine ready for your feedback. No cover sheet is needed. Scratch a note on a page or two of the manual, and fax it to us: 651-XXX-XXXX. We'd appreciate knowing who you are, too.

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- 1) Use them and teach them to others.
- 2) Send us feedback and ideas and insights.
- 3) Take the materials and improve them.
- 4) Hire us to deliver a custom training or help you design a custom application
- 5) Donate to the Dendros Foundation (tax-deductable, even!)
- 6) Buy stuff from www.GoodWorkTools.com

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Version History and References

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This is a project of the Dendros Group, LLC. We stand on the shoulders of those who have come before us. Please visit our references page at goodworktools.com for a complete list of references and acknowledgements.

The Focus Conversation and the Consensus Workshop were first developed by the Institute of Cultural Affairs (ICA). In the 1980's and 1990's they were packaged as the Technology of Participation (ToP) and taught as a variety of courses, including the Group Facilitation Methods. *ToP is a trademark owned and controlled by the ICA; this is not a ToP product.*

The Focused Conversation and the Consensus workshop can be found in many books. What's called the "Meta Method" here is elucidated in many disciplines. Please visit www.GoodWorkTools.com for a complete list of references and books.

Thanks to everyone who has shared their knowledge and skills with me, especially Linda Alton of MnToP, LLC and Marilyn Oyler of Partners in Participation, LLC. - Jonathan Bucki, March 2008

Version History

March 18, 2008: **Pilot launch.** After a couple sleepless nights, we piloted the first edition of this work at the Science Museum of Minnesota.

March 25, 2008: **Reorientation of the grids.** After a reluctant eureka moment, I acknowledge that we've been trained to read columns left to right, top to bottom. So, instead of starting in the lower left quadrant for the What? Level, we now start in the upper left and cross the vertical axis when we move to So What? Sometimes my cleverness doesn't live up the real world the way I'd like it to.

March 31, 2008: Thanks to Timothy Den Herder-Thomas who quickly sketched another way to represent stacking of the method.

September 29, 2008: Many thanks to Iowa Deb Burnight, CTF of Facilitated Resources for capturing a tricky typo.

November 10, 2008: Additions (half baked) include Trend Wave worksheet, Action Planning start

What is consensus? How do you know when you've reached it?

How can time be an ally?

What are ways to encourage participatory space?

How to apply fc/cw in spaces to get people together

Online facilitation