

Visioning

What is it? A highly participative approach to goal setting for groups of all sizes.

When to use it? When members need to clarify their own thoughts and then share those ideas with each other. To create a clear, shared statement of the desired future.

What does it do? Allows people to put forward their ideas. Makes sure everyone is involved and heard from. Creates energy. Gets people aligned. Gives people a creative method to identify a group goal.

How to do visioning?

1. Post a series of questions that relate to the task and ask how the final outcome should look. The vision questions will always be different, of course, depending on the situation.

Sample visioning questions for a customer service improvement team.

Imagine that it's exactly two years from today:

- Describe how we now serve our customers?
- What specific improvements have we made?
- What are they saying about us now?
- What problems have we solved?
- What specific outcomes have we achieved?
- How are people behaving?

2. Ask each person to write down their own responses to the questions. Allow at least 5-10 minutes. Give more time if needed. Ask people not to speak to each other during this writing phase.

3. Ask everyone to get a partner. Allocate 3-5 minutes for the first partner to tell their vision. Ask the other partner to facilitate. After 3-5 minutes are up, ask the partners to switch roles so that the second person gets to talk.

4. When the time is up, ask everyone to find another partner. Repeat the above process, this time shorten the time. Encourage people to 'steal' any good ideas they got from their last partner and incorporate these into their own vision.

5. Repeat the process a third time with new partners. This time limit the exchange to 1-3 minutes per person. This encourages people to prioritize and share the highlights.

Tip: You can keep switching partners until everyone has spoken to everyone else. This creates lots of energy!

6. Ask everyone to return to their original seats and start to facilitate a discussion to pull the ideas together. You'll find that ideas have become fairly homogenized.

Tip: A good way to proceed is to go question by question and have each person just read all their ideas on that item. Then ask people what themes they heard repeated and record these.

What's the Outcome? This visioning process is very participative and creates lots of energy in the room. It also creates buy-in because the group's direction is coming from the members themselves. Everyone is involved at once. All ideas are heard. This is a great way to do goal setting, which is otherwise a very boring activity.

Force-Field Analysis

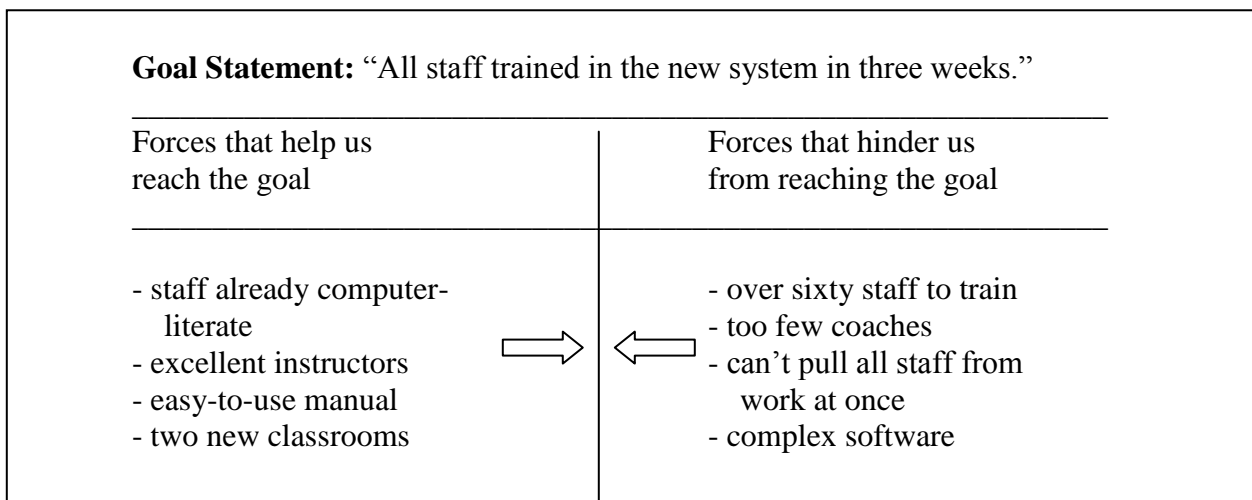
What is it? Force-field is a structured method of looking at the two opposing forces acting on a situation.

When to use it? When you need to surface all of the factors at play in a situation, so that barriers and problems can be identified.

What does it do? Clarifies the resources available and the barriers or obstacles to success. Helps groups understand where they need to focus their attentions.

How to do force-field analysis?

1. Identify a topic, situation or project. Example: computer training.
2. Help the group state the goal. Example: "All staff trained in the new operating system in three weeks."
3. Draw a line down the center of a flip chart sheet. Use one side to identify all of the forces (resources, skills, attitudes, etc.) that will help reach the goal. On the other side identify all the forces that could hinder reaching the goal (barriers, problems, deficiencies, etc).

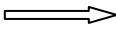
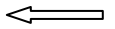


4. Once all helps and hinders have been identified, a decision matrix or multi-voting can be used to determine which of the hindrances or blocks are a priority for immediate problem solving.

5. The priority barriers can then be solved using the systematic problem-solving model.

Variations of force-field analysis. Force-field is one of the most valuable tools available to facilitators. A number of variations have been created that are used following roughly the same steps as those described previously.

These variations include:

Pros	Cons
Things we're doing well	Things we're not doing well
Hopes	Fears
Best case scenario 	 Worst case scenario
Assets	Liabilities
Strengths	Weaknesses
Glads	Sads

What's the Outcome? Force-field is a tool for analyzing situations in order to understand the forces in play. It helps groups make more effective decisions because it lets members look at both sides. It identifies blocks and barriers that need to be solved and is valuable as a means of identifying problems that need to be solved.

Gap Analysis

What is it? Gap analysis is a technique for identifying blocks to achieving a desired goal.

When to use it? When a group needs to understand the gap between where they currently are as compared to where they ultimately want to end up.

What does it do? Gap analysis lets you explore the missing steps between where you are and where you want to go. It forces a realistic look at the present and helps identify the things that need to be done to arrive at the desired future.

How to do gap analysis?

1. Identify the future state. Visioning can be used or any other approach that yields details about where the group wants to be at a specific time. The description of the future must be detailed. Post on the right hand side of a large section of wall space.

2. Next identify the present state. How are things now? Describe the same components in the future state, only do so in real, present terms. Again, be very detailed. Post on the left hand side of the workspace.

3. Now focus on the gaps. Ask members to work with a partner to discuss:

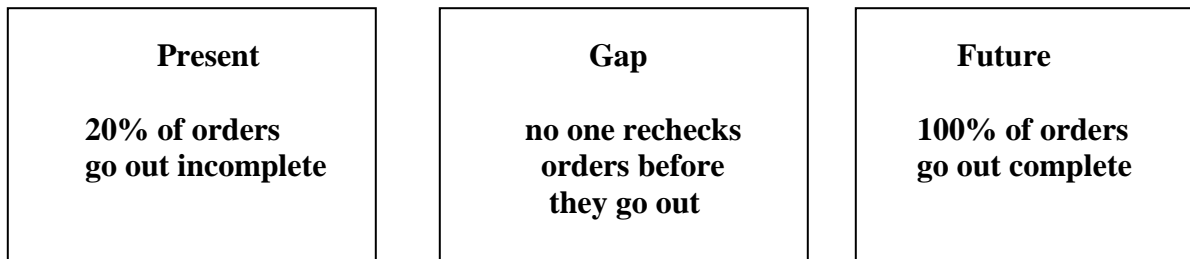
"What is keeping us from the future?"

"What are the barriers?"

"What are the missing components?"

"What actions do we need to take to reach the future?"

4. Hold a plenary to share ideas comparing the present and the future.



5. Once there's consensus on the gaps, divide the large group into subgroups and give each subgroup one or more of the gap items to problem solve.

6. Reconvene the larger group to hear recommendations and action plans. Ratify the plans and create a mechanism to follow up on progress.

What's the Outcome? Gap analysis lets you describe the present and the future. This sets the stage for being able to identify actions that can be taken to fill the gaps.

Facilitative Listening

What is it? A technique for getting people to listen to each other and really hear each other's ideas. A way of teaching people effective listening skills.

When to use it? To insure that people really understand each other in situations where there are opposing ideas and people have a history of not hearing each other's views. As a key first step in mediating a conflict.

What does it do? Allows everyone to get a fair hearing and feel understood by the "opposing side." Circumnavigates conflicts by placing people in pairs and limiting their interactions to either presenting views or listening to understand.

How to do facilitative listening?

1. Announce that you'll be asking participants to take part in facilitative listening. Review the following rules:

- One person will be speaking and expressing their thoughts about the subject at hand.
- The second person will be limited in how he or she may respond. It is your job to:
 - Stay neutral no matter how you feel about what the other person is saying. Do not express opposing views or argue back.
 - Listen actively by maintaining eye contact and using attentive and open body language.
 - Ask probing questions after each point made by the other person to get more information.
 - Paraphrase what the other person is saying by repeating their main ideas to gain clarity.
 - Summarize what the other person has said to insure his or her ideas have been understood.

2. Clarify the topic to be addressed, then ask everyone to find a partner. It's important that people select a partner from the "opposing" group. Ask the partner pairs to spread out around the room so that they feel they have some privacy.

3. Determine how much time is appropriate for the particular topic. Set a timer and have the pairs begin their conversations. Maintain time frames and make sure that people play both roles.

4. After the first round, stop the action and ask everyone to find a second partner. Stop after the second round or repeat the process to deepen the dialogue. The facilitative listening pairs can be repeated as often as desirable.

5 a. If you're working with two individuals, ask each to make a short presentation back to the other person summarizing his or her new understanding of the situation. Insure these summaries are acceptable to both parties.

5 b. If you are working with two groups, allow the groups to caucus separately to combine the information that each person heard into a summary of the views of the opposing party. Have each group appoint a spokesperson to make a presentation to the other group, summarizing their understanding of the other party's views. Check the summaries to make sure they're satisfactory.

What's the outcome? This structured approach to listening insures that people listen to, comprehend and acknowledge opposing views of others. Since counter-arguments are not allowed, people are encouraged to hear each other's views. When people feel heard, it relieves tension and sets a positive tone for tackling issues together.