IAF Think Tank

THE ART AND SCIENCE OF CONSENSUS

Conference Session Report

January 17, 1999

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Agenda Overview

The Second IAF Think Tank on The Art and Science of Consensus brought together over fifty participants to build on the work of the 1998 work on the Pillars of Consensus:

- The morning session explored *consensus insights of experts and authors* in many fields - current trends and applications, related concepts, historical and cultural models, cooperative decision techniques, participant facilitation competencies for consensus building.

- The afternoon session produced *insights of the participants in the field* – key success factors, challenges and practical methods for the collective tool box of consensus-building.

The session operated on IAF Think Tank parameters:

- Context: The Think Tank is a (vehicle for a) collaborative (vs. didactic) interactive, ongoing discovery (vs. instructional) process (vs. event) designed to break new ground in edge areas of knowledge related to the art and practice of facilitation.

- Groundrules:
  - Initiate and sustain ongoing dialogue between participants
  - Focus on central research question
  - Provide briefings but no presentations
  - Operate on assumptions that anyone who "shows up" has the knowledge, information, expertise to contribute valuably
  - Leadership serves as a process facilitator vs. content expert
  - Group self facilitates and creates products

This report contains notes from the group discussions, exercises and research activities. Sincere thanks to the many who freely gave their time and wisdom to further facilitators' ability to lead consensus building and collaborative processes more effectively.

Williamsburg, VA | January 16, 1999 **IAF Facilitator Journey Day Think Tank:** **THE ART AND SCIENCE OF CONSENSUS** Facilitated by Mirja P. Hanson and R. Bruce Williams		
Objectives: 1. Exploring multiple theories of consensus 2. Sharing field experiences about the challenges and critical success factors 3. Harvesting practical tools for facilitating consensus		
Session	**The THEORETICAL Basis**	**The PRACTICAL Tools**
CONTEXT	• Consensus Think Tank Background • Participant Introductions	• Consensus Pillars Overview • Upcoming Participant Applications
WORKSHOP	• Review of Key Research Areas • Individual Study Time • Reporting Key Insights	• Video Case Study • Keys to Consensus: Challenges, Success Factors, Benefits • Formulating Methods for a Consensus Tool Kit
REFLECTION	• Individual and Group Highlights • Conclusions on the State of the Art and Science	• Workshop Evaluation • Next Steps of Research
Timing	**Morning Session**	**Afternoon Session**

Background:
1998 Consensus Think Tank Report

Making binding public agreements has shifted from a necessity to a luxury. Consensus building is occurring with increasing frequency and an increasing variety of approaches. Governing Magazine's recent article on the "Consensus Industry" sited the acceleration in facilitated meetings, proliferation of mediation centered in the USA and growth of the consensus-related consulting industry around the world.

Is consensus decision-making a momentary societal fad or a new foundation? What consensual decision-making approaches are used in the public and private sectors? What are the leading definitions, models and methods? How do traditional or contemporary theories explain how and why consensus works?

The IAF has launched a research effort to discover and declare some "stakes in the ground" regarding mechanisms of consensus. As those who show up at the center of many consensus processes, it seemed important for facilitators to have an official voice on this matter. At the 1998 Santa Clara IAF Conference forty people began a dialogue around the question: How are current models, methods, theories and applications of consensus based decision making paving the way for a new era in objective public discourse and collaborative engagement?

To walk the talk, the research followed a consensus based process: A) An <u>assessment</u> of the existing theory and practices relating to consensus, B) an <u>analysis</u> of the pillars of a consensus process and finally, C) an action plan for <u>researching</u> the next levels of breadth and depth.

A. Assessment: An inventory of the field of consensus
What are existing and ongoing efforts and conversations on consensus which we need to pay attention to, or include in our dialogue?

The gathered experts identified a rich array of practitioners and philosophers that are colleagues in the quest. The following is a snapshot of the topics and players in the field of consensus:

> <u>Current Trends and Applications</u> such as...
> ... reconciliation movement, dual track diplomacy, Roberta's Rules initiative, negotiated
>   legislative rule making and reinventing democracy.
>
> <u>Related Concepts</u> such as...
> ... conciliation, community building, search for common ground, negotiation, shared power mechanisms, shared vision, the "ahah" effect, creating true community, living community, learning to play, shared meaning, collective sense-making and shared decision-making.
>
> <u>Historical and Cultural Model</u> such as...
> ... league of Women Voters, Socratic dialogue, Jesuits, Iroquois Confederation and Quaker processes
>
> <u>Cooperative Decision Techniques</u> such as...
> ... consensus techniques, hand books and cookbooks, large group technologies, participative management, new tools in cyber facilitation, town meetings, academic meetings on dialectical discourse and "public space", integrative structural modeling, diversity mapping
>
> <u>Participant Competencies for consensus-builders</u> such as...
> ... self awareness ability, facilitator personhood, interpersonal research and theory, group dynamics research, the importance of relationships and intuitive thinking as a spiritual path

B. Analysis: The Hypotheses from the Field
In the experience of the researchers around the table, what seem to be pillars of group thinking, organization and commitment required for participating in effective consensus process? The participants dug deep into their experience, shared ideas, and formed ten emerging properties at the heart of the art and science of consensus:

> A. A consensus <u>process</u>...
>> (1)... uses a predisposition approach that is thoughtful and agreed upon by participants
>> (2)... requires a context which is shared, fluid, supportive and acknowledged
>> (3)... happens when there is a unifying direction, outcome or destination
>> (4)... leaves room for the flow of energy, break-throughs and innovation among the "shadows"
>> (5)... fosters awareness of the profound, "invisible voices" of individuals and groups
>> (6)... cultivates a balanced "center" that merges the intuitive with the rational
>
> B. A consensus <u>setting</u>...
>> (7)... requires a safe and comfortable environment which builds confidence of all members
>> (8)... requires a responsible, respectful and spirited use of time and space
>
> C. A consensus <u>participant</u>...
>> (9)... requires a generous, open and tolerant attitude
>> (10)... should not lose the "I" as they speak the truth with compassion in the quest for a commonly created truth

C. Action: Priorities for Future Research
What needs to be the collective research agenda for 1998 and beyond? The think tank participants confirmed the importance of the subject. The ring is being formed and, as facilitators, we need to be active players in it: It is a core activity of the profession. We need to actively seek edge insights and inventions and contribute effective concepts and tools for educating the public.

The group suggested several goals for IAF's research: Broaden our understanding and get stretched by the thoughts and understandings of other fields. Communicate the consequences and benefits of consensus building for all users. Contribute applicable tools and strategies for consensus building that don't depend on a particular personality or facilitator. Explore the marketability of the process and how it is perceived by non-facilitators. Participants identified possible research actions for the coming year such as refining the "pillars" for further thinking, beginning a formal clearing house of consensus-related literature, and conducting action research on several "consensus pillars" to report and refine at the next IAF think tank.

Conclusion

Consensus building is not just one more way to arrive at joint decisions. Participants felt consensus is a whole new way of relating to one another and living in an inter-related universe. The session only touched the surface of the art and science of consensus building. 1998 will be a year of formulating research activities and building an agenda for a full day think tank at the 1999 IAF Conference.

Think tank facilitators and participants discovered the power of collective interactive dialogue as a mechanism for research. The group welcomes new members to the task of learning more about what is at <u>stake</u>, what do we <u>make</u> and what does it <u>take</u> to build consensus in our time.

1999 Think Tank EXPECTATIONS

What are we <u>interested in exploring</u> about consensus?
What is your <u>stake in the topic</u>?

A. *Identify* process descriptions, definitions and concepts
- Take steps to define consensus or win-win approaches
- Decide if consensus is an event or process
- Explore whether the best decisions come out

B. *Understand* consensus tools and applications
- Learn available tools
- Identify process parts and how to use tools
- Target road blocks in general
- Know when consensus is not there… false consensus
- Learn about consensus and size
- Know which situations and events warrant consensus and when
- Discover when not to use consensus

C. *Make* comparisons and links with other decision and dialogue modes
- How to deal with tendency to go back to familiar voting language and formats versus sticking with consensus

D. *Discover* ways to honor diverse positions, stakeholders, behaviors in consensus settings
- Learn how to honor positions in consensus
- Gain insights on how to work with certain types of personalities
- Seek ways to deal with competing stakeholders

E. *Explore* roles of participants and facilitator
- Discover ways to honor positions in consensus
- Learn helpful roles of the facilitator
- Distinguish roles of internal versus external facilitators
- Learn how to transfer skills and how to help learn themselves
- Learn where facilitators can cause problems

1999 Think Tank REFLECTIONS

HIGHLIGHTS: *What WORKED during the session?*
- Video
- Two facilitators
- Table groups
- Skits
- Learning from each other
- Pre-writing and graphics
- Online capture of data
- Breadth of literature
- Posted agenda
- Offer to send the materials
- Humor
- Complementary styles
- Good questions

ACKNOWLEDGEMENTS: *What did you APPRECIATE about each other?*
- Willingness to listen
- Willingness to share
- Sincerity
- Willing to let new people in
- Passion
- Drawing, writing… TALENT!
- Positiveness
- Differing perspectives
- Seriousness

TAKEAWAYS: *What SOUVENIERS are you taking with you?*
- Techniques
- Gestalts on a complicated complex topic!
- Clap once if…; a technique for bringing groups back together
- Poetry
- Discovered possibilities in places where I thought they didn't exist
- Video on collaboration

Key INSIGHTS from READINGS

- Authors' Themes -

What are <u>general conclusions</u> of authors, experts and others regarding keys to consensus?

A. *Consensus building* needs a carefully guided, multi-step process
- Decision making is a series of events - need to be conscious of who should participate at each step (group 4)
- Facilitators role to make explicit where group is and orchestrate the building blocks: discussion, decisions, implementation) (group 4)

B. *Consensus building* definitions, tools and applications need to be diverse, flexible and customized
- Different situations call for different strategies (group 3)
- Confirmation of consensus is necessary. Determine scale of agreement (group 3)
- There are different definitions, levels and types of consensus (group 5)
- There are a lot of techniques and questions out there to help develop consensus (group 5)
- Be willing to do the tough work of consensus - building and help others understand their own definition of a winning outcome (group 6)

C. *Consensus building* is a quest for common ground
- Creating cooperative social systems versus competitive social systems (group 2)
- Taking groups to a new place and a higher plane for broader welfare (group 5)
- Letting go of positions, interest based groups and moving toward a mutual and focused view (group 7)

D. *Consensus building* can catalyze creative and new capacities
- Tapping creative aspects of collaborative genius (group 7)
- Building synergy where the whole is greater than its parts (group 7)

E. *Consensus building* requires the heart, the mind and the spirit
- Paradox: Focus on group/organization goals requiring even more focus on individual skills (group 1)
- Recognize the intellectual and emotional elements that form both bridges and boundaries (group 6)
- Go against the natural flow - listen and hear the heart and mind of the other(s) (group 6)

F. *Consensus building* products and benefits are complex and long term
- Product of consensus goes beyond decision itself. It reflects and impacts the culture of group. It builds relationships (group 4)
- Work to enable discussion, decision and implementation (group 4)
- Need to guard against "false consensus" and group think (group 4)

G. *Consensus building* requires listening and respecting diversity
- Heeding cultural factors; Importance of mitigating existing tensions (group 2)
- Ensure understanding through dialogue regarding differences being heard and reflected on. The more challenging the situation the more critical it is to focus on listening (group 3)

H. *Consensus building* requires building trust and relationships
- Need for trust versus fear (group 1)
- Groundrules help build trust (group 1)
- Interdependence and whole group security (group 2)

Key Insights From READINGS

- Participant Reflections -

CONSENSUS IMAGES

Haiku:

Freedom of Perspective…
Respect for difference…
Higher place

Limerick:
There once was a group with dissension
That argued and didn't pay attention
Then someone stopped talking
And listened without balking
And found the agreed with some passion

They wished they could share their emotions
With no fear of creating commotion
They tried and they tried
Without taking a side
And the facilitator needed no magic potion

Chant:
The art of consensus requires a bit of all of us.
We give it our best and respect to the rest.
For us to agree we must allow our minds to be free!

Skits:
- People with arms interrelated, interlocked and intersecting in dynamic motion

- A silent mime of people around the room, listening (putting hands on ears to amplify incoming sound) while one person spoke (hands making a quaking motion next to the mouth) with each round of voicing and listening, the group got closer and their differences narrowed (signified by facilitators arms getting closer and closer together as she gauged the scope of diversity at each phase)

Key INSIGHTS from READINGS

- Participant Reflections -

INSIGHTS INVENTORY: Reflections on the Group Report Exercise

The WHAT'S: *What did you do in the last 6 minutes?*
- Rapid synthesizing
- Agreeing on understanding
- Discovering who is invested in the discussion
- Experienced an environment in which is OK to try things
- Trusted the facilitator's offered structure
- Determined how much I will participate
- Saw people emerge as facilitators
- Responded to a time limit

The HOW'S: *What helped you to do this?*
- Offering of ideas
- Knowing each other
- Not knowing each other <u>too</u> well
- Participants' skill at listening
- Participant's skill at summarizing
- Common desire to learn
- Accepting an imperfect outcome
- Ridiculous time frame
- Enthusiastic attitudes
- Playfulness
- Not a lot of fixes positions
- Everyone was on common ground
- Someone had a vision and a plan
- Fear-free environment
- Couldn't be wrong
- Encouraging one another

MIDCOURSE REFLECTION: Conclusions about the Art and Science of Consensus

The SCIENCE: *What aspects of consensus are more <u>sure or clear</u>?*
- Consensus is sometimes the outcome of conflict
- There is diversity of opinion on consensus - no consensus on consensus!
- Consensus takes more than simple solutions
- It's helpful for individuals involved to trust that collective genius is at least as valuable as individual genius
- Consensus involves a risky balance and tension
- Clear objectives seem to help
- Intensity is required
- Where trust is present, consensus can work because you have more drive for a joint outcome
- Complying behavior doesn't necessarily equal consenting behavior

The ART: *What aspects of consensus are very <u>fluid, situational or intuitive</u>?*
- Environment plays a crucial role
- Consensus equals a function of heart and mind, and you can't predict <u>either</u> the heart or the mind
- Knowing who to involve, as well as when and how
- A degree of letting go is required
- Definitions of consensus

Think Tank CASE STUDY

Applegate Partnership Video Reflection

Video Overview:

Think tank participants began the afternoon observing the experiences of a collaboration in forest management at an Oregon watershed.

Description:

The community-based Applegate Partnership is comprised of industry, conservation groups, governmental agencies, research scientists and residents cooperating to protect and restore the health of the Applegate River watershed, and to provide economic and community well-being.

The Applegate River watershed, encompassing approximately 500,000 acres is located on the northeastern flank of the Siskiyou Mountains in southwestern Oregon. This is one of the most biologically, botanically and geologically diverse areas in the country. About 70 percent of the land is publicly owned. Intensive logging, extensive road building, fire suppression and a decade of drought have dramatically changed the composition and structure of the forest in the watershed. These factors have resulted in over-crowded young forests, high levels of insect damage, changed species diversity, and increased risk of catastrophic fire. The Applegate Partnership's goal is to reestablish the health of the forest and watershed through a cooperative community effort, using natural resource principles that promote ecosystem health and natural diversity across the entire watershed.

Direct participation by the community in determining the future of their watershed has the potential to overcome the animosity and gridlock which have characterized forest management for the past decade. Creative solutions can emerge as all sides recognize the common ground shared by many diverse groups.

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Reflection:

What happened to the PEOPLE?
- Became less polarized
- They were willing to accept imperfect solutions
- Accepted change
- Redefined the problem
- Shared a vision
- Process served as a neutral camp and a catalyst for change
- Taught each other new views
- Made shift from "I" to "we"
- Redefined views of each other
- Listened to each other even though they did not trust each other in the beginning

What did the FACILTATOR do?

- Helped humanize
- Listened to what went on - interpreted, boiled down, enabled next steps
- Focused on the objective and legacy of the group
- Helped maintain respect
- Arranged it so all can see and hear each other
- Created an over-arching vision
- Catalyzed doing the video
- Provided maps
- Created a safe space for emotions
- Assumed it needed to be a continuous process
- Fostered liteheartedness
- Remained neutral
- Didn't create dependence

What did you detect as EVIDENCE of CONSENSUS BUILDING?

- Started listening in different way
- Focused on similarities
- Decided on taking a step or two forward
- Generally agreed on what the forest would look like
- Developed some trust
- "We" became a dominant theme
- Agreed to disagree
- Got beyond fuzzy information and went onto developing assessments together
- Players didn't leave the process
- They were willing to adapt to changing situations
- Shared accountability

What other INSIGHTS did you have about consensus development?

- Job of facilitator is to focus on changes within people
- Catalyze new paradigms… "Manage for all species" emerged as a new way of thinking
- Need to try to move toward highest value
- All had lots of humility
- The key is for everyone to sense there is something for each if they participate
- Need to believe something can come out of the process
- This is old common sense stuff!

FACILITATOR'S ANALYSIS: Conclusions from the Field

CHALLENGES: *What are <u>root issues and constraints</u> in achieving consensus?*

A. Involving the Whole System
- How carry the impact of changed people back to those not represented at the table
- Getting the right ones at the table
- Finding way to bring people together in good faith

B. Achieving Meaningful Alignment
- How to bring them together and really foster the unity
- Defining and redefining issues early and clearly. All seeing the value of addressing the issue together
- Achieving power balance and symmetry
- Reaching closure too fast and have it unravel later

C. Sustaining A Facilitative Role
- Keeping the faith/possibility through tough times. Faith in facilitator
- Maintaining your own ability to maintain hope
- Knowing when you are not needed
- Achieving facilitator comfort with ambiguity

D. Fostering Honest Sharing
- Making people feel wanted at the table
- Fostering honest disclosure
- Getting started if there is no common ground
- How make sure everyone has their issue on table

E. Staying At the Table
- Recovering form real ugly scenes
- Safely leading people through the chaos and frustration

SUCCESS FACTORS: *What are <u>key strategies, or approaches to effective consensus</u> or collaborative processes?*

A. Invite All to be Insiders and Owners
- Make sure all voices are heard in the first 2-5 minutes
- Create introduction which reveals humanity
- Planning before it starts. Pre-understanding of positions of stakeholders and key issues

B. Clarify Expectations Early
- Build shared vision and values early, early and really early
- Make sure there is upfront agreement on objectives, purpose, approach
- Do your homework. Get some agreement before getting into the room

C. Assure Process Leads Somewhere
- Assure follow-through on action
- Make sure they have skills to the work after the meetings. Allow learning without embarrassment

D. Agree on Hard But Human Rules
- Acknowledge and help group understand the time required
- Groundrules - start with generic rules and leave room to add more
- Assure that a continuous quorum stays through the process
- Enable participants to take a lot of pride in work they are about to do
- Remember – it's their process!

E. Ensure Ways to Hear and Analyze Diverse Views
- Establish factual context. Check what is known at the start
- Welcome participant input in any form
- Acknowledge the unspoken "shadow"
- Use methods which enable participants to <u>really</u> see the range of views
- Provide a way to deal with differences in new light
- Honor the entire group. Facilitator's customer is the whole. Watch for not favoring one path. Care for all the issues
- Clarify hidden agendas. Know demons in your self
- Be willing to go in to the muddle and also to have silence

F. Structure Deep Listening, Thinking and Processing
- Facilitator and group – really practice listening in non-threatening way early. Improve other skills in interpersonal relations
- Use methods of getting topics off line or tabled to keep on task
- Know method in advance and encourage communication between meetings
- Ways to communicate in multiple ways - written/oral comments, reports, ceremonies, etc.
- Allow time for the necessary flow of process and processing

G. Prepare Facilitators Ability to be Neutral and Effective
- Work through your own "stuff"
- Stay patient and positive
- In complex and long term projects, use a co-facilitator
- Have heart. You need to care about group
- Behave objectively
- Resign as general manager of the universe

Consensus APPLICATION DOS AND DON'TS

DO's

When is it <u>wise to use</u> a consensus/collaborative process?

- When addressing issues from a "systems" perspective
- When a group has common purpose or vision
- When it's in people's interest to find common ground
- In community-based coalition with no assigned leader
- Before commitment to decision or to action
- Before the emergency happens…
- When clear parameters have been established and a charge has been given
- When the group needs to have shared ownership of the decision or outcome
- When the group represents (or is made up of) all the players within a process flow
- When mission and values are clarified, like in a new business launch

DON'Ts

When is it <u>unhelpful to use</u> a consensus process?

- When the boss wants a specific conclusion, but wants it to appear consensual
- When there is no incentive to be consensual, and there is incentive to be non-consensual
- When a champion or ownership is unclear
- When the outcome is arbitrary - such as what color to paint the room
- When a "quick fix" is needed
- When no money is in the bank today for follow-through
- When the group is sick of your methods
- When there is no underlying common need
- When no decision is required
- When you are in the middle of the emergency…
- When the facilitator is too biased on the issue
- If you haven't attempted to assess an organization's control environment e.g. how people perceive the goals of an organization
- If you haven't carefully analyzed the significantly varying levels of ownership and investment that exist within the group towards the specific decision or outcome. Don't get into a public meeting and have the diversity surprise and overwhelm you

CONSENSUS TOOL BOX OVERVIEW
(by phases of process)

A. Tools for… …Getting STARTED	B. Tools for… …Deepening DIALOGUE	C. Tools for… …Creating CLOSURE
- Home owners survey (p. 40) - Process change and identification (p. 21) - Business process objectives, risks and controls assessment and action planning (p. 27) - Clearly articulate and write a decision or question for discussion (p. 27) - Group lego building exercise (p. 28) - Full value contract (p. 39) - Trial balloon of a format (p. 31) - Unveiling of the un-discussible groundrules (p. 30) - Current reality dialogue (p. 32) - Vision and metaphors (p. 29) - Introduction dreams conversation (p. 33)	- Stacked conversation method (p. 20) - Cross lobbying (p. 19) - Procedural suggestions (p. 22) - Six hats (p. 20) - Anoint a co-facilitator (p. 24) - Highlighting dissent (p. 25) - Think-pair-share (p. 25) - Tell life experience (no specific overview) - De-brief (p. 28) - Think-Pair-Share (TPS) (p. 37) - Workshop method (p. 38) - Who am I? (p. 38) - Moment of silence (p. 39) - Tandem massage all participate in circle (p. 36) - Idea matrix assessment (using symbols - *, **, ✔, ✔ ✔) (p. 34) - Interaction agreement (p. 33) - Bracketing (p. 34)	- Focused discussion - ICA (p. 22) - Carousel (p. 21) - Color cards (p. 23) - Grass roots support (p. 23) - Backing into agreement (p. 26) - Proposal call for consensus (p. 26) - Forced choice (p. 40) - Participant writing teams (p. 19) - Huge timeline with events, ups and downs, etc. (p. 31) - Red checker/black checker (p. 35) - Commitment scale (p. 32) - Consensus meter (p. 35)

CONSENSUS TOOL BOX OVERVIEW
(As reported by teams)

Need or Use	Tool
Group #1	
• Evenly distribute talk time - avoid dominance • To force participant to see value of others ideas • When process bogs down or is unclear • Achieve buy in form constituent group • To get agreement on ideas in a large group • For creativity • Need to understand process and roles • Identify stakeholders	• Stacked conversation method (p. 20) • Cross lobbying (p. 19) • Procedural suggestions (p. 22) • Focused discussion – ICA (p. 22) • Carousel (p. 21) • Six hats (p. 20) • Process change and identification (p. 21) • Del Phi (no specific overview)
Group #2	
• Break impasse • Unblock • Generate lots of ideas to get moving again • Test consensus • Tell story before explaining positions • To build acceptance	• Anoint a co-facilitator (p. 24) • Highlighting dissent (p. 25) • Think-pair-share (p. 25) • Color cards (p. 23) • Tell life experience (no specific overview) • Grass roots support (p. 23)
Group #3	
• To assess, review and improve the performance controls of a business process • Time - sensitive situation to produce consensus • Enhancing: evaluative thinking about group work; sharing concerns and observations • Clarity on topic or decision • Understanding group and personal experience • When group has talked about issue and solutions and seems ready for action	• Business process objectives, risks and controls assessment and action planning (p. 27) • Backing into agreement (p. 26) • De-brief (p. 28) • Clearly articulate/write decision or question for discussion (p. 27) • Group lego building exercise (p. 28) • Proposal call for consensus (p. 26)

Note: These are the same set of tools as those listed on page 16

CONSENSUS TOOL BOX OVERVIEW (continued)
(by teams)

Need or Use	Tool
Group #4	
• To increase participation; get more answers; come to consensus-seeking in pairs	• Think-pair-share (TPS) (p. 37)
• To deal with issues	• Workshop method (p. 38)
• When group energy is flat or cranky and/or before/after breaks	• Who am I? (p. 38)
• Group polarized; not moving off their position	• Forced choice (p. 40)
• Need pause to integrate, facilitator needs time to think, slow down pace, etc.	• Moment of silence (p. 39)
• Have group set guidelines and mange expectations	• Full value contract (p. 39)
• When group is showing they want to bridge barriers but don't quite know how. When tension is high	• Tandem massage all participants in circle (p. 36)
Group #5	
• To summarize a consensus	• Participant writing teams (p. 19)
• Reflecting for closure	• Huge timeline with events, ups and downs, etc. (p. 31)
• Need to get going - try something	• Trial balloon of a format (p. 31)
• To establish group norms	• Unveiling of the un-discussible groundrules (p. 30)
• Get a group started and build relationships	• Current reality dialogue (p. 32)
• Data gathering from homeowners	• Home owners survey (p. 40)
• In future year _____, this organization will be like _____ because _____	• Vision/metaphors (p. 29)
Group #6	
• To help teams dialogue toward consensus; black = forward, red = back	• Red checker/black checker (p. 35)
• Surface high potential ideas	• Idea matrix assessment (using *, **, ✔ , ✔ ✔) (p. 34)
• Small groups or teams to come to agreement on issue having problem with	• Interaction agreement (p. 33)
• To identify common set of hopes/dreams for group	• Introduction dreams conversation (p. 33)
• When one piece of information appears to be blocking group proceeding	• Bracketing (p. 34)
• To identify what participants need in order to commit to a decision or action	• Commitment scale (p. 32)
• To gauge degree of consensus of team members	• Consensus meter (p. 35)

Note: These are the same set of tools as those listed on page 16

Building the Tool Box:
SHARE-A-CONSENSUS METHOD

Name of Method:
PARTICIPANT WRITING TEAMS TO AUTHOR THE SUMMARY DOCUMENT

Source of Method:

When to Use this Method:
At the end of a consensus building session or at the end of a 2-3 day retreat

Desired Outcomes:
Written summary sentences and paragraphs which use the recorded data (flips and cards, etc.) and notes from open discussion - and which articulate the overall consensus and ground that consensus in real examples

Process Steps and Hints:
• Keep as much data recorded as possible
• Select/ask for volunteers ahead of time so that they know that they will be summarizing later
• Give the writers some simple guidelines and permission to do a good draft, not a polished product
• Announce to the group who the writers are (no surprises)
• Have the "good first draft" read back to the group for comment and modification (word something)
• If they've missed the mark - go back to the drawing board based on feed back known

Hints and Comments:
• The group - writing formats can help like: "In the arena of _____, the major challenge is _____, as illustrated by
  a)   b)   c)

Name of Method:
CROSS LOBBYING

Source of Method:

When to Use this Method:
• After a first cut at vote that was very close or
• Prior to voting or
• When people can't make decisions on top x items

Desired Outcomes:
• Focus the group to see value of ideas and to look at idea differently

Process Steps and Hints:
• Write a statement to promote each idea - by each person
• Assuming number of topics is low (under 10?) ask participants to write 2-3 reasons on each topic or idea as to
  why it should be voted as #1. They basically are lobbying for each idea to come out on top.
• If large group or don't want to take time for each person to address each one, verbally ask, at random. a
  participant to give a positive, or lobbying-type comment - even if it's not one of their top choices.

Hints and Comments:

Name of Method:
STACKED CONVERSATION

Source of Method:
Frankly, I can't remember, but I think it is in several different source books on techniques and I've experienced and used it as a participant and facilitator

When to Use this Method:
1) When it is particularly important that discussion or dialogue be distributed fairly and rather evenly among all participants 2) When the natural flow of discussion is resulting in those who jump in first being the most dominant in air time; when real eagerly participating members don't see that they are crowding out other views and voices

Desired Outcomes:
• Everyone who want to speak gets a chance to speak in a turn without having to push their way into the flow of the discussion • Everyone can relax about knowing they will get to say what they want in a fair, orderly way and they can truly focus on listening to what others are saying

Process Steps and Hints:
• A neutral facilitator notices who is indicating a desire to speak and writes down their names in the order they signal their desire to speak. When one person has been given a full opportunity to say what they wish, the facilitator says the name or gives a signal to the person who's turn is next. If someone's point has already been made, they can pass when it's their turn.

Hints and Comments:

Name of Method:
6 HATS

Source of Method:
Ed De Bono

When to Use this Method:
• Creativity tool to use both sides of your brain and your heart • Safe emotional venting tool

Desired Outcomes:
• Hear everyone's views in an equitable way • Come up with new solutions by building on ideas

Process Steps and Hints:
(can't actually remember the colors and specific steps) 1. Pose the issue 2. Explain the 6 hats (each hat represents a way of thinking about an issue. Example: white = factual, green = possibilities, black = when it's no good) 3. Give a set amount of time in round robin brainstorming to give views in one color hat 4. Switch hats, give set amount of time to brainstorm and flip chart 5. Repeat until all 6 hats have been done 6. Discuss/clarify what is up after all is done 7. Use input to make decision

Hints and Comments:
• Need quick recorders at least 2 • Very good to use with complex, emotional issues

Name of Method:
PROCESS CHANGE IDENTIFICATION CONSENSUS

Source of Method:
M. Kathleen Joyce (via TQM tools experience and process re-engineering projects)

When to Use this Method:
Use for consensus on anything that involved a process (almost everything involves a process!). This works for "classical" process re-engineering, but for lots of other needs too. For example, I use it to get folks to focus on what the participants will need to know (and in what order to teach it) when designing training manuals.

Desired Outcomes:
Agree on a process - not represented verbally, but visually

Process Steps and Hints:
• Give a short "methodological mini-training" on the flowchart process
• Have small groups (representing each organizational unit) use post-its to define/delineate each step of the process, unit of the organization, etc. as it is currently
• Give the small group poster paper and have them line up their post-its this way: (they should draw connection lines between the boxes) unit/person responsible, time
• Have each small group present its findings to the larger group. They can take notes about comments, disagreements, etc.
• Have the larger group then create a "process wall" either using sections that folks agree on from the small group work or making deletions (changes/additional as required). It may take several iterations with small groups to get to the large group.
• Identify gaps, problems, needs for attention, etc.

Hints and Comments:
• There's great software that gives a more "web-looking" (i.e. spider web) look to the process. It's called Mindman. Email me at mkjoyce1@aol.com for particulars.

Name of Method:
CAROUSEL

Source of Method:

When to Use this Method:
To get agreement on a proposal or ideas by a large group

Desired Outcomes:
Original group will modify their proposal so group can begin agreement

Process Steps and Hints:
• Small groups record their proposal on flip chart paper
• Papers posted around room
• Groups move from chart to chart and write comments on post-its to add to chart
• Original group then refines proposal

Hints and Comments:

Name of Method:
FOCUSED DISCUSSION

Source of Method:
• ICA • Winning Through Participation

When to Use this Method:
Use to communicate consensus of a representative group to constituents and to secure feedback for finalization of group's plan or report

Desired Outcomes:
• Communication of draft report to total group • Buy-in from total group • Commitment of group to their product

Process Steps and Hints:

• Skill training of group in process of focused conversation. Then use it for:
   - Initial task of communicating to total group
   - Consensus sessions
   - Communicating draft report in small groups
   - Final reporting

Hints and Comments:
• Give clear directions in writing • Set up for accountability - report back to group

Name of Method:
PROCEDURAL SUGGESTION

Source of Method:
Facilitation communication skill - Art of Questioning

When to Use this Method:
• When the process is prevented from moving forward, or members are unclear, afraid to proceed to the task at hand. The facilitator uses procedural suggestions such as: I recommend we review the steps in the process; I recommend we call in a resource; I recommend certain parties leave and let the core team define their issues; I recommend we adjourn for today and reconvene tomorrow

Desired Outcomes:
To gain consensus on a procedure to get group moving in a direction they all agree

Process Steps and Hints:
1. Summarize current state 2. Relate what has happened 3. Suggest a procedural action (avoid reprimands, or negative consequences) 4. Explain what will happen next 5. Ask for agreement 6. If group doesn't agree, ask for rationale for why they don't agree 7. Restate current state or group's position 8. Make or ask for alternative procedural suggestions 9. Seek consensus

Hints and Comments:

Name of Method:
GRASS ROOTS SUPPORT

Source of Method:
Experience in client service environment

When to Use this Method:
Trying to encourage change in behavior (improve efficiency of a process)

Desired Outcomes:
Change in behavior/action

Process Steps and Hints:
• Build grass root support on a individual basis, solicit input to evolve/enhance idea
• Then bring idea to larger group/higher level
• Demonstrate benefit by speaking as if I was a customer of the client organization

Hints and Comments:

Name of Method:
COLOR CARDS

Source of Method:
Various authors for last 15 years

When to Use this Method:
• When everyone in the group needs to: see/hear/understand everyone
• Quickly move on when help agreement
• Decisions on do we work this out now if not when

Desired Outcomes:
• See/understand everyone's current view
• Process management
• Match time need with time available

Process Steps and Hints:
• Ask participatns to write answes to a focus question or problem on a 5x7 card
• Share views by posting cards on the front wall
• Move cards around to create major conclusions and decision areas

Hints and Comments:
• Need to write cards in big letters so they can be seen from the back tables

Name of Method:
KICK-OFF ACTIVITY WITH POLARIZED GROUPS **START WITH THE EXPERIENCE THAT LED TO YOUR POSITION**

Source of Method:
Common ground method for life and choice

When to Use this Method:
To begin session with people from groups that are polarized by asking them (one at a time) to talk about what happened in their lives that led them to their position. Often, this is a rich story that captures their humanity and that points to all the ways they are similar to members of the polar opposite group - breaks down same barriers by exposing their "common ground"

Desired Outcomes:
• To humanize the "demons"
• To help people learn to listen
• To learn how you are alike/share similar issues/values in some areas

Process Steps and Hints:
• Don't know details - but focus is on experience and questions only for sake of clarity
• Use as kick-off activity

Hints and Comments:

Name of Method:
ANNOINTING ANOTHER FACILITATOR OR **CO-FACILITATORS FROM AMONG THE PARTICIPANTS**

Source of Method:
From my mediation experience and the Bible

When to Use this Method:
When disputing parties are at an impasse

Desired Outcomes:
• A jumpstart to move off an impasse, and a resulting infusion of energy and commitment to resolving the remaining issues in dispute
• Resolution of at least one obstacle to eventual consensus

Process Steps and Hints:
• Put disputing parties into caucus, then bring out a simple representative from each group and ask for their help (I usually "elect" or anoint the representing attorneys)
• Explain or review the accomplishments so far/the current impasse
• Ask for their insights into how to resolve the impasse
• Get a side-bar agreement, then ask them to take it back to the private caucus and "convert their brethren" (when ye have been converted, convert your brethren…")
• Discuss how to spread the conversion, if necessary

Hints and Comments:
• Choose "anointees" who are influential in their respective groups
• Get them away from their groups and working together in a sub-group with the facilitator

Name of Method:
HIGHLIGHTING DISSENT

Source of Method:
Personal experience

When to Use this Method:
When dissent prevents the group from moving forward

Desired Outcomes:
• Alleviating dissentees anxiety and increasing the dissentees trust in the process
• Moving the process forward

Process Steps and Hints:
• Probe the dissentees with questions aimed at visualizing what a resolution would look like in a concrete way

Hints and Comments:

Name of Method:
THINK-PAIR-SHARE (TPS)

Source of Method:
Share-a-Method-Book

When to Use this Method:
• To create multiple options quickly in a large group
• To get unstuck, shake up the norm patterns of the group

Desired Outcomes:
• One to one, personalized approach generates lots of ideas that may have more practical applications
• Reduces risk of censure for a "goofy" idea

Process Steps and Hints:
• Ask individuals to think silently, jot down notes, report to a partner and merge your best ideas

Hints and Comments:

Name of Method:
CALLING FOR CONSENSUS

Source of Method:
TC Buttle "On Conflict and Consensus" (an adaptation)

When to Use this Method:
• When a group has had preliminary discussion and investigation of the issue and some dialogue about solutions, has some sense of collective ideas and is ready to move toward action/decision

Desired Outcomes:
• For group to openly consider a proposal • For individuals to identify concerns • For individuals and group to share responsibility and effectively resolve concerns • To reach collective support for a proposal/decision (i.e. consensus!)

Process Steps and Hints:
1. A subgroup or individual presents a written "proposal" outlining issue and recommended action to the group (based on previous group dialogue). Facilitator has previously established agreement with the group around the norm. Individuals are responsible for raising concerns. The group shares responsibility for solving concerns 2. Facilitator asks for a) open discussion about proposal b) clarifying questions c) unresolved concerns 3. Facilitator asks for ideas to resolve concerns as a group (sometimes proposal sent back to subcommittee here) 4. If a collective solution does not emerge, group lists and attempts to resolve concerns 1 by 1 (this needs to have a time limit - may go back to sub-group)

Hints and Comments:
Key: The call for consensus is - Are there any unresolved concerns? (when there are no unresolved concerns - consensus is reached)

Name of Method:
BACKING INTO AGREEMENT

Source of Method:
Experience

When to Use this Method:
• Time sensitive situation to produce consensus • After group has "formed" and "started"

Desired Outcomes:
Agreement/consensus on a vision, goal, alternative, or action

Process Steps and Hints:
1. Have small groups give report 2. Ask for acceptance of one group's report (not likely to happen) 3. Identify common words and themes 4. Have someone link words and themes 5. Edit until there is agreement

Hints and Comments:

Name of Method:
OBJECTIVES, RISKS AND CONTROL PROCESS ASSESSMENT

Source of Method:
Various internal auditing risk based assessment approaches

When to Use this Method:
When the players within a process need to assess whether the process is well controlled, over controlled or has control gaps

Desired Outcomes:
• Agreed upon process OBJECTIVES
• Agreed upon process RISKS (potential impediments to the achievement of a process goal)
• Agreed upon process CONTROLS (things which can be put in place to ensure that the objectives of a process are achieved and that the risks are eliminated or minimized)
• Agreed upon ACTION STEPS with assigned responsibilities and dates

Process Steps and Hints:
Within a facilitated session (made up of key process participants)
1. Walk-through the high/medium level process flow (and gain concurrence or adjust if needed)
2. Brainstorm and agree on the high level business objectives for the overall process (usually 3-6)
3a. Identify potential risks/impediments for each of the objectives
3b. Optional, have the group estimate a probability of occurrence, have the group estimate an estimate of impact of occurrence
4. For each identified risk, identify an action which can minimize the potential of occurring
5. Identify action steps to implement controls
6. Assign responsibilities and due dates and next steps
7. After the session review the current controls in the process to the needed controls. identify unnecessary controls (go), control gaps (need), adequate control (stay)

Hints and Comments:

Name of Method:
ARTICULATE THE DECISION STATEMENT OR DISAGREEMENT

Source of Method:
Don't remember

When to Use this Method:
When the group is muddled on a decision or not connecting

Desired Outcomes:
• Clear decisions

Process Steps and Hints:
Write a statement, or simple question, that articulates the conflict on a flip chart - help the group to refine the statement or question to help them:
• Agree on what they agree on
• Identify/articulate areas of dispute

Hints and Comments:

Name of Method:
LEGO BUILDING TEAMS

Source of Method:
Don't remember - this is my own variation

When to Use this Method:
This variation: to help teams understand and have a basis for discussing how they work/don't work effectively together

Desired Outcomes:
• Improved understanding of interpersonal issues and team concerns

Process Steps and Hints:
• Buy 2-3 (or more if needed) simple lego spaceship sets
• Break group into 2-3 teams
• Assign roles to members of team (e.g. project manager, designer, etc.)
• Have each team send 1 representative to meet with a "client" who shows them the completed model for 60 seconds and answers questions. Representatives must then return to their teams and guide the teams through building the model. Allow ~ 10 minutes to complete model and then display results
• Vary the exercise according to needs. For example, if there are problems assimilating new members, transfer key participants among teams mid-way-through; if the team has trouble asking for resources or expressing its needs, make help available - but only if they ask
• Debrief, discussing the implications for how the team works in real life

Hints and Comments:
• Have fun - vary the exercise to suit your instructional needs

Name of Method:
DE-BRIEF

Source of Method:

When to Use this Method:
• In lieu of an evaluation of the session at the end of the day. The de-brief allows all to reflect on the work of the group

Desired Outcomes:
• Reflection
• Sharing of joys or unvoiced concerns
• Enhanced communication
• Enhanced sharing

Process Steps and Hints:
• With ten or so minutes left to the end of the session, give participants opportunity to share any thoughts, reflections or observations on the day
• Ground Rules to debriefing: Anyone can share, anyone can pass, no one can respond to what someone else says, limit each member to ½ minutes

Hints and Comments:
• It is as important for the facilitator to honor ground rules as anyone else (it is very tempting to say "oh that didn't happen" or, "I'll try and do better"

Name of Method:
VISION METAPHORS

Source of Method:
Don't know original source. I modified an approach of a co-worker, Louise Hamilton.

When to Use this Method:
Whenever you are trying to achieve a shared vision

Desired Outcomes:
Highlighted commonalties and differences regarding the participant's individual perspective of where the organization should go and what the organization should become in the future

Process Steps and Hints:
1. Set the stage. Prime the pump by asking thought-provoking questions about the future 2. Have individuals brainstorm around the vision of the organization 3. Tell them to create a metaphor (using any available materials) which will represent the organization as they see it in the future. This organization in the year 2004 will be like a _____ because _____. 4. Ask them to share their metaphor and tell why they chose that particular metaphor 5. Reflect on commonalties/differences. What excited them? 6. Discuss outcomes and arrive at common direction and values

Hints and Comments:
Try it! It works! Opens creativity. (May have some resistance by participants at first, just encourage them to try it, you'll be amazed, they'll be amazed at what they come up with!)

Name of Method:
ISOLATION OF STRATEGIC CHOICES

Source of Method:
A design by Shankland and Associates for Rare Center for Tropical Conservation (Sherwood Shankland)

When to Use this Method:
Long term strategic planning - 3-6 month process

Desired Outcomes:
• Re-thought 5-year vision/values • A framework for strategies and priority programs • In-depth discussion and consensus among board and staff members

Process Steps and Hints:
• Design session of overall process with president, board chair and 4 other key players • Interviews with board and staff to build rapport and an understanding of who's who • Survey instrument 4 questions to gather feedback on strengths, weaknesses, long term goals, short term improvements • 3 day staff retreat; 1 day board meeting - joint document • Circulated document to all participants: staff and board • Identify key strategic choices from vision data, barriers data and strategic directions data in the joint document • Joint board and staff meeting to recommend the solutions/choices needed for operational planning

Hints and Comments:
• Assign joint board and staff teams to write up the results and follow through to completed budgets and work plans • Celebrate the where process with all players to launch the next phase of work (or fiscal year) • Document the process and make a presentation at the next IAF conference

Name of Method:
PRE-MEETING GENERIC GROUNDRULES (UNDISCUSSABLES)

Source of Method:
Self

When to Use this Method:
- Knowledge of perceived "difficult" people and at meeting
- Predetermine possible groundrules and suggest a generic set for the group to agree they can live with
- Keeps member of group from possibly being embarrassed if brought up in group
- Helps put undiscussables on groundrules list

Desired Outcomes:
- Group accepts generic groundrules and perhaps adds few others - moves quickly

Process Steps and Hints:
- Suggested "delicate" groundrules unveiled to group with explanation of groundrules

Hints and Comments:
- Rarely does potential problem surface during meeting - achieving consensus cause this

Name of Method:
ANONYMOUS CARDS

Source of Method:
Previous organization meeting

When to Use this Method:
- Criticism might produce retribution/fear (whether fear warranted or not)
- Organization experiencing serious problems but still desire has to sormue

Desired Outcomes:
- Knowledge of all group concerns/criticisms
- Anonymity frees response process
- All issues on table
- Discussion of issues open "because it wasn't my criticism/suggestion/idea"
- Resolution/discussion of problems/issues that might otherwise remain undiscussed

Process Steps and Hints:
- Participants complete as many cards as they wish
- Only one issue or problem per card (may be done at or before initial meeting)
- All issues listed on common discussion space
- Each one prioritized for discussion
- None eliminated
- Discussion leads to action cards - committees for action
- Repeat meetings for follow-up

Hints and Comments:

Name of Method:
TRIAL - BALLOON

Source of Method:
Frances Soloway

When to Use this Method:
- When the group is too tentative on arriving at a decision, and you assess that prolonging discussion will only protract conflict and entrench positions. Suggest nothing is carved in stone. Why not give a particular solution a trial run, and then evaluate. Takes a lot of heat off the "being right"

Desired Outcomes:
- Group having a taste of collaboration will enjoy outcome. Opportunities for modification, but a place to start from

Process Steps and Hints:
- Clear understanding of what the trial balloon is
- Prepare to "massage" it according to input of participants
- Acknowledge the higher ground parties are aspiring to

Hints and Comments:
- Moves process forward
- Ongoing monitoring is crucial

Name of Method:
GROUP TIMELINE FOR CLOSURE - AFTER THE WORK

Source of Method:
Graduate course on consulting skills at Loyola University, Chicago. Instructor: Ross Keane

When to Use this Method:
- To celebrate closure, appreciate accomplishment or "final" plan - especially when there has been significant learning, change of position and the group will not be meeting with same regularity or intensity in the future
- When's there's a "finish"

Desired Outcomes:
- Acknowledgement of work done
- Affirmation of commitment along the way
- Realization of turning points
- Readiness to move to next phase

Process Steps and Hints:
1. Have butcher paper - flip chart paper - long, on big wall; Prepare it with a time frame of the event in a timeline
2. Introduce: We've done our task in this agreement; Moving into a new phase; What have been the milestones along the way for you?…
2b. Invite: Each member to note key elements in life of group; Can be turning points in thinking or any other formal and informal happenings
3. Talk about the timeline - let the stories emerge
4. When there is nothing else… good work… (usually hugs ensue naturally)

Hints and Comments:

Name of Method:
CURRENT REALITY DIALOGUE

Source of Method:
Field application and adaptation

When to Use this Method:
- Early state of group; often used as opening activity of 2-4 day strategic planning session
- During retreats or more reflective times in group's journey
- When there is need to recognize and honor diversity of perspectives re: the "big picture" (not issue-oriented)
- As a "scanning" method

Desired Outcomes:
- Shared understanding of perspectives of group
- Set the stage for more intensive dialogue - i.e. successful task, lots of teamwork, fast-paced quality work output, reporting dynamic modeled, etc.
- Helpful if not everyone knows everyone else - way to build relationships quickly over a task

Process Steps and Hints:
1. Random teams identified
2. Each team has 4 quadrant template/worksheet
3. Individual complete worksheet
4. Categories are somewhat customized for group or event
5. Teams discuss and share ideas
6. Teams select 3-5 key insights to share with large group
7. Teams report during group plenary from posted templates
8. Group discussion about each report
9. May do prioritizing if helpful
10. Document for feedback to the groups "proceedings"

Hints and Comments:
- Teams may choose facilitator, recorder and reporter - best not to appoint them
- Pre-done, well drawn templates
- May design it at different levels of system, e.g. one group does the economic, another the political, another social

Name of Method:
COMMITMENT SCALE/AGREEMENT SCALE

Source of Method:
• My colleague Bill Garaner

When to Use this Method:
- To help participants increase consensus around commitment
- Helpful in a wide variety of planning activities as well as mission statement agreement
- Use as a "diagnostic" to help participants see what it will take to move toward consensus

Desired Outcomes:
- Movement toward consensus regarding commitment

Process Steps and Hints:
- Line up group on a scale of 1-10
- 1 = not committed, 10 = very committed, 5 = not sure (or 1 totally disagree, 10 totally agree)
- Divide group - cluster in 6-8 people
- Ask questions - what would it take to move up scale

Hints and Comments:
- "Re-scale" them if there are large clumps in one area

Name of Method:
INTRODUCTORY DREAM CONVERSATION

Source of Method:
Modification of a very simple opening conversation

When to Use this Method:
• Use very early on in strategic planning off site
• Use with a department, team, workgroup or community group when there is great diversity

Desired Outcomes:
• The recognition that there is more agreement in the group than people might suspect
• A common base to build on
• A chance for everyone's voice to be heard

Process Steps and Hints:
• Do overall group welcome
• Take care of housekeeping staff
• Do a very quick ice breaker opening activity
• Tell everyone we're going to engage in an opening conversation
• Each person is to say 4 things 1) name, 2) what they do 3) number of years affiliated with organization 4) share a dream they have for the organization, one they'd like to see come true before they leave, retire or whatever
• Go around with facilitator modeling process
• Debrief - what were 1 or 2 common themes you heard in own dreams?

Hints and Comments:
• You can be linear and go around or do it another style - when spirit moves you speak

Name of Method:
INTERACTION AGREEMENT

Source of Method:
IMPAQ (team tools and processes)

When to Use this Method:
• When helping the group come to an agreement about a particular issue

Desired Outcomes:
• Group agreement to take an action regarding a particular issue affecting the members of the group

Process Steps and Hints:
• Outline the problem/issue
• Group comes up with a recommendation (facilitator helps group get very specific about plan of action)
• Facilitator asks all participants if they agree to follow action plan

Hints and Comments:
• Modification may be necessary to get consensus of group

Name of Method:
IDEA MATRIX ASSESSMENT USING *, **, ✓, ✓✓ SYMBOLS

Source of Method:
Mary Wong

When to Use this Method:
• Generate ideas for significant process improvement

Desired Outcomes:
• Surface the high potential ideas from the list

Process Steps and Hints:
1. We brainstormed various ideas under each of Mike Hammer's process templates
2. The ideas were put into a matrix and sent to each participant for assessment. They were to put the following notation next to an exciting idea for them
* = we are doing and should keep
** = we are doing and should do more of
✓ = we are not doing but should
✓✓ = we are not doing and if we do would provide dramatic gains
3. Each input was compiled into a master matrix and then given a score which the participants did not know
* = 1
** = 2
✓ = 3
✓✓ = 4
4. Each assessment remained on the master matrix so that the team could see how each assessed so that any gaps could be explained by the contributors. During the discussion, the assessment could be changed
5. The total of the items would help determine the top band of ideas to pursue

Hints and Comments:

Name of Method:
BRACKETING A BLOCKING PIECE OF INFORMATION

Source of Method:
ICA, TM experience

When to Use this Method:
• From time to time a group will reach a consensus on a "board full of information" but are in disagreement with one particular piece of information. It can be enabling to the group to bracket - i.e. take that information off the board and place it on or in a different place until such time as the group is prepared to deal with it i.e. "take it out of brackets"

Desired Outcomes:
• Move the group along and perhaps new data, time or group understanding will solve or handle the information in brackets. If not, just leave it there till another day

Process Steps and Hints:
• Take the "card" that is blocking the group and ask - "shall we just realize we don't agree with this by putting it on the back wall until such time as it becomes essential to our dialogue?"
• Then move it and announce "let's move on!"

Hints and Comments:
• This can be very freeing to a group - I have done it several times and most often the group will redefine that data in BRACKETS and find a place to use it

Name of Method:
RED CHECKER/BLACK CHECKER

Source of Method:
unknown

When to Use this Method:
• Use in groups as they dialogue towards consensus

Desired Outcomes:
• An appropriate and participative manner to praise a move towards consensus or to indicate to a team member that they are interjecting something that you disagree with

Process Steps and Hints:
• Each group member is given a red and black checker (the larger the better) • If a member wants to recognize a team members move towards consensus they "play" or toss their checker in the middle of the table and state their agreement or praise • If a team member is upset or cannot live with a statement or direction of the team they "play" the red checker and state their concerns

Hints and Comments:
• Variations: Team members keep the checkers that are played to them until a break

Name of Method:
CONSENSUS METER

Source of Method:
unknown

When to Use this Method:
• A tactile graphical display of the consensus of a group or members of a group

Desired Outcomes:
• Gage the degree of consensus of a group or group members

Process Steps and Hints:
• Create a consensus meter - Create template - Copy to transparency - Create indicator arrow and attached to transparency • Ask members to display to all their "meter" reading • Facilitator or team member "operates" group "meter"

Hints and Comments:

Name of Method:
TANDEM MASSAGE

Source of Method:
ICA global gathering in Lonavala, India 1994

When to Use this Method:
• When group is wanting to bridge barriers

Desired Outcomes:
• Builds intimacy, trust in group

Process Steps and Hints:
• Stand in circle, everyone turn to right (i.e. move clockwise 90º)
• Everyone massage the shoulders of the person in front of her, then gently "pound" on the upper back , then use fingertips to simulate rain falling on back
• Reverse, massage person previously standing behind you

Hints and Comments:
• Be careful that no one will be offended
• Know the participants' culture(s)

Name of Method:
AGENDA PLANNING (ONE ELEMENT)

Source of Method:
Basic agenda planning skill

When to Use this Method:
• When planning, sending out and posting agendas for meetings

Desired Outcomes:
• Clarify of expectations for each topic/agenda item in a meeting

Process Steps and Hints:
• For every agenda topic, list whether it is:
  - Introduction only - plus clarifying questions?
  - Discussion only (and clarifying questions) - discussion on a general topic or only on a specific proposal?
  - Decision (after discussion) - decision possible or required at this meeting?
• Or other category

Hints and Comments:
• Could be more than one at the same time, but separating items into separate sessions gives people time to think

Name of Method:
TICK MARKS

Source of Method:
Workshop yesterday

When to Use this Method:
• When need to equalize air time

Desired Outcomes:
• Give people feedback on frequency of speech - they'll adjust accordingly

Process Steps and Hints:
• Observer scribes on flip chart
A||||
B||
C|||
↑ names of participants
• Observer scribes tick marks every time someone talks
• Quietly post at start of next meeting, maybe put on wall before attendees arrive

Hints and Comments:

Name of Method:
THINK-PAIR-SHARE (T-P-S) A COOPERATIVE LEARNING STRATEGY)

Source of Method:
Frank Lyman, Howard Co., Maryland - named the model and researched it

When to Use this Method:
1. Increase participation
2. Increase number of ideas
3. Stop one or two from dominating
4. Increase reflection
5. Allow people to form stronger relationships (through the pairing method)
6. Can be applied in any part of the process (warm-up, brainstorming, etc.)
7. Narrow down options to reduce choices
8. To consolidate number of brainstorm choices

Desired Outcomes:

Process Steps and Hints:
1. Ask people to form pairs
2. Explain they will be asked to: first think individually about question
3. Then pair together
4. Than share with each other
5. Then share with group
6. Now pose question or task and go through above directions
Some ways to use it:
1. The group is brainstorming (example: ways to do something) and you get all the answers form the pairs and record
2. The group is brainstorming (ways to do something) and when they pair they are asked to share and narrow down to their top 2-3 ideas only and you go round robin and record
3. (a version of TPS) Can also have 2 working pairs to come together and do what I have named (consensus - seeking in pairs) (= 4 people). They are to narrow down their 2 lists (1 list per pair) using this guide to narrow down: 1. keep some, 2. discard some, 3. consolidate some, 4. create a new one, 5. agree to disagree

Hints and Comments:

Name of Method:
WORKSHOP METHOD

Source of Method:
ICA

When to Use this Method:
• Whenever it is necessary to bring out ideas to deal with an issue

Desired Outcomes:
• Define clearly what issues are and approaches to deal with them

Process Steps and Hints:
1. B/S and get 3 word ideas on cards
2. Star most important
3. Collect input from participants and put on wall
4. Group like ideas, done by group
5. Title each group

Hints and Comments:

Name of Method:
WHO AM I ACTIVITY

Source of Method:
John Bouke, Bourke and Associates, Dallas, Texas

When to Use this Method:
• Throughout a meeting, especially longer ones (one to three)
• When a group knows a little or a lot about each other
• When the energy in a group has plummeted

Desired Outcomes:
• To refresh the group's energy and to learn more about each other

Process Steps and Hints:
• As the group is gathering, ask people to fill out an index card with one thing about themselves that qualifies as "a little known fact" or a "surprising fact". Give examples, "I know how to hog tie a calf" "I was homecoming queen" "My retirement goal is to learn to yodel". Collect cards (anonymous) and before or after breaks or when cranky read a card and ask the group to nominate 3 potential authors of that card and have them stand. Then ask the real author to stand and the non-authors to be seated. Do as many or as few cards as time allows - use freely - only takes a few minutes and people love it

Hints and Comments:
• When possible, get through all cards so everyone gets to play - not essential, just nice if possible
• It's great fun - laugh along

Name of Method:
(MOMENT OF) SILENCE

Source of Method:
Quaker? humyn evolution?

When to Use this Method:
- When you as facilitator need a moment to think
- When you sense the group needs a pause for reflection
- When pace too fast
- Sometimes appropriate when group is getting stormy
- At end of session, especially if something profound happened

Desired Outcomes:
- Before doing go-round (round robin) so people listen to others' contributions instead of thinking what they'll say on their turn
- Remind people of commonality, void at center
- Slow down pace
- Allow space for integrating input
- Figure out what to do next
- Return focus to listening

Process Steps and Hints:
- It's really pretty straight forward…
- With confidence, "I'd like to ask for a moment of silence."

Hints and Comments:
- Don't use to shut off emotions

Name of Method:
FULL VALUE CONTRACT (ESTABLISHING GUIDELINES)

Source of Method:
?

When to Use this Method:
- Contentious or "risky" issues
- Times when participants are asked to be vulnerable

Desired Outcomes:
- To have a list of guidelines that the group has created which will guide the process. Creates buy-in immediately. Participants hold each other accountable

Process Steps and Hints:
1. Give each person in the group 1 minute to come up with 1 desired result of the session, and 1 thing they expect of the group (or 1 think they need to feel "safe")
2. Have each person in the group share their desired result/goal and the one thing they want from the group
    - While each person shares, write each "safety" issue (i.e. respect for speaker, no hidden agendas…) onto a flip chart
    - Also address and manage the expectations (will their expectations be met)
3. Have the entire group sign the "Full Value Contract" (or get a head nod…)
4. When a rule is broken refer back to the group contract

Hints and Comments:
- Works great

Name of Method:
FORCED CHOICE

Source of Method:
My experience in working in maternal-child health issues

When to Use this Method:
• When group is very polarized, or seems to be stuck on their positions
• Can also be used as an energizer

Desired Outcomes:
• To create better understanding of participant's viewpoints
• To provide a space where individuals might consider shifting their viewpoint

Process Steps and Hints:
1. Have participants move to parts of the room after being asked a difficult question (statement) (Example: Gays and lesbians should be given the right to marry. Abortion upon demand is always wrong.)
2. Participants move to places designated: "Strongly agree", "Agree", "Disagree", "Strongly Disagree"
3. Have individuals who strongly disagree share with the group what their position is and "what can the group learn from them." What can the group learn from the individuals who choose strongly agree
4. Does anyone want to change their position after the discussion

Hints and Comments:

Name of Method:
TO OBTAIN CONSENSUS ON PROPERTY OWNER ISSUES FROM OWNERS LIVING FAR AWAY

Written survey and questionnaire - using survey data collected - a small group selected key issues to present at a general meeting of property owners

When to Use this Method:
• Facilitation ORID was used to refine the key issues against the vision of the organization

Desired Outcomes:
1. A list of key issues to present to county commissioners for change
2. Correction of issues would lead to accomplishment of the property owners vision

Process Steps and Hints:

Hints and Comments:

RESOURCE RESEARCH NOTES

LITERATURE TITLE: Managing to Survive in a Competitive World
AUTHOR:
Think Tank Researcher: Myron Tribus

Author's Key Ideas
- How to increase productivity $\Rightarrow$ efficiency
- 2nd Industrial Revolution workers must be involved
- Deming resp. managers train, model use
- 14 principles
- All must change
- Spirity of humility
- Long history of creativity

Crucial Insights
- Creativity can flourish when people are properly led

Implications

RESEARCH RESOURCE ANALYSIS

TITLE: The Search Conference…   **RESEARCHER:** Karolina Mikova   **DATE:** 1/16

Author's Key Ideas
- Chapter six: conditions for creative collaboration definition of consensus
- Edgar Shein: A psychological state induced through influential discussions such that "those members who would not take the majority alternative, neverless understand it clearly and are prepared to support it."
- Conditions for collaborative action and diffusive learning are: 1) Openness… exploration; 2) Mutual shared objective field… interdependence; 3) Basic psychological similarity… at least we are all humans; 4) Trust
- Even in small groups, consensus decision-making often involves an unspoken agreement by the group to be fuzzy about what they disagree with, concealing individual differences as a means of maintaining an illusion of harmony… it's much better to have people to yell at each other, than no talk at all…

Crucial Insights	• It's better to have conflict present at the table than under the table • We are facilitators should help an assist group to go as far as group can on the road toward consensus/consent/agreement
Implications	• Because there is no one definition of consensus in each situation (group) there is a need to identify, what we mean by consensus, any group should be continuos about toward what wind of decision they are heading

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RESEARCH RESOURCE ANALYSIS

TITLE: 7 Habits of Highly Effective People   **RESEARCHER:** Larry Peters, Greg Stephens, Elaine Simonson   **DATE:**

Author's Key Ideas	• Both parties should be satisfied with outcomes or decisions • The definition of "satisfied" is personal, with both intellectual and emotional elements • Both emotional and intellectual elements are boundaries and bridges • Component pieces of "win-win": knowing what your "win" is - being with the end in mind - clarify of desire; approaching the setting/conflict willing to allow win-win outcomes - play well with others; accepting personal responsibility for behaving in a consensus-seeking fashion; listen - rules 1-3 (when in doubt, when not in doubt); foster an abundance mentally and invite others to do so
Crucial Insights	• Recognize that there are emotional and intellectual determinants of consensus • Go against the "natural" flow-listen rather than talking, use silence, rather than noise • Must be willingness to do the hard work (open, willing to hear) to reach consensus • Help people understand (facilitate) what a "win" is for them!
Implications	• Consensus is more a function of receiving than giving information

	• Pay attention to meta-messages

RESEARCH RESOURCE ANALYSIS

TITLE: The Quaker Persuasion   **RESEARCHER:** Beulah Ferguson   **DATE:**

Author's Key Ideas	• Chapter 9: A Four-Square Faith • Tenet #2 Universality By Grace • As applied to international affairs… • Negotiation and arbitration, methods natural to Quakers, effective as "quiet, calm deliberation" conducted by two parties. Labor disputes are usually settled by discussion and mutual conclusion until a decision is reached
Crucial Insights	• Confidence and trust on one side usually brings the same qualities in the other parties • Quakers addressed themselves to what was best in their hearers
Implications	• Universality of Grace - bestowed on all who wish to accept it

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RESEARCH RESOURCE ANALYSIS

TITLE: Team Decision Making Techniques   **RESEARCHER:** Karen Topa   **DATE:** 1/16/99

Author's Key Ideas	• What is team decision making? • Why do teams work? ⇒ skills are pooled • When do you use specific techniques? • Team decision versus individual • Brainstorming taps creativity • Each process has steps within process (brainstorming, vote, etc.) • When making decisions - criteria must be established and understood, established ground rules
Crucial Insights	• What -why - when • Trust other perspectives
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: A Participative Management Primer   **RESEARCHER:** Nancy Batson   **DATE:** 1/16/99

Author's Key Ideas	Why participative management (defined as employee involvement in the problem solving and decision-making process) is needed? • To better utilize our human resources • To break down unnecessary walls between departments or work group, managers and employees • To improve quality of work and profits • To foster better communication and teamwork among co-workers • To increase employee morale through being involved, being considered important and making a difference Cautions: There should be an assessment of the need for and the capability of installing participative management in an organization Critical support factors: 1) Upper management support and refocusing of values in the organization 2) 1st line managers need group-process skills 3) There be employee training in the roles and skills of participative management
Crucial Insights	• Managers should consider whether participative management is appropriate and what type of support is needed to make it successful • Participative management has its roots in democratic ideals and taps the constructive power of employees • The job of managers is to bring out the strengths of the work force
Implications	• It requires a substantial commitment of time and effort to change the values and practices in an organization

	toward those that support participative management

RESEARCH RESOURCE ANALYSIS

TITLE: The Evolution of Cooperation Chapter 1   **RESEARCHER:** Kathy Joyce   **DATE:** 1/17/99

Author's Key Ideas	• Looks at cooperation in the context of "The Prisoner's Dilemma Game". In the game, each player has the option to cooperate or defect. "Each must make a choice without knowing what the other will do. No matter what the other does, defection yields a higher payoff than cooperation. The dilemma in that if both defect, both do worse than if one had defected." • The entire book is based on analysis of the game (and appears from Chapter 1 to be focused toward international relations). "Most promising finding": if facts of "Cooperation Theory" are known by participants, the evolution of cooperation can be speeded up.
Crucial Insights	Results: "… under suitable conditions, cooperation can indeed emerge in a world of egoists without central authority." It evolves in three stages: 1) Cooperation can evolve form small clusters of cooperators, 2) Reciprocity based cooperation can survive, 3) Once established, (on the basis of reciprocity), cooperation can protect itself from less cooperative strategies
Implications	1) There are lessons for facilitators in IR literature 2) Find the clusters of cooperators and build form there 3) Don't necessarily expect a "higher-order" of cooperation (e.g. not based on reciprocity)

RESEARCH RESOURCE ANALYSIS

TITLE: Achieving Integrative Agreements   **RESEARCHER:** Tina Sung   **DATE:** 1/16/99

Author's Key Ideas	• Synonym for consensus = integrative agreements $\Rightarrow$ reconcile interests and yield high joint benefit • Consensus usually involved development of novel alternatives $\Rightarrow$ value of knowing and using creative problem solving • 4 reasons to use consensus versus compromise: 1) High aspirations, high resistance; 2) Integ.-agreements are more stable; 3) Strengthen relationship; 4) Contributes to broader welfare • 5 methods for Achieving Integ. Agreements: (Each involved different method of refocusing the issues) 1) Expanding the pie; 2) nonspecific compensation; 3) Logrolling; 4) Cost-cutting; 5) Bridging • Analysis of interests underlying proposals use of hierarchical tree (insight - 5 whys) • Nature of problem solving: policy of firm flexibility. Firm on interests : flexible on means. Firm on essentials : flexible on non-essentials • Conditions encouraging development of integrative solutions • Value of contentions behavior
Crucial Insights	• Value of creativity • When to use integrative agreements • Good refocusing questions • 5 whys
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Great Meetings   **RESEARCHER:** Ray Zentis   **DATE:** 1/16/99

Author's Key Ideas	• The book generally covers the structure and dynamics of meetings and facilitation itself including design of meetings, understanding and definition of problems/issues, tools for problem solving and more • Regarding conclusions: Author identifies consensus as a method of group decision making, wen it is used, levels of consensus by individuals in group, how to maximize consensus
Crucial Insights	

Implications	

TITLE: Ground Rules for Effective Groups   **RESEARCHER:** Nancy Rehbine   **DATE:** 1/16/99

Author's Key Ideas	• Effective groups tend to have either explicit or implicit rules that guide their behavior. When groups follow shared ground rules, they're better able to communicate and make decisions by ideas grouped rules are rooted in values - valid information, free informed advice and internal are easy to understand but commitment difficult to implement. They must be practiced and used regularly • To seek consensus the facilitator must find a way to generate valid information, share information relevant to an issue in a way that enables other members to determine for themselves if the information is valid
Crucial Insights	• These values reinforce each other when group members are internally committed to decision more likely to ensure implementation ground rules aren't a panacea they don't eliminate struggles of group development or reduce risks associated with openness or ensure everyone will agree but they can make conflicts more constructive
Implications	16 ground rules based on work of Chris Argyris, Don Scon, Rober Tshu, William Urg and Corllanal Cammann through reinforming values: 1. Test assumptions and inferences 2. Share all relevant information 3. Focus on interests, not positions 4. Be specific, use examples 5. Agree on what important words mean 6. Explain reasons behind ones statements, questions and actions 7. Disagree openly with any group member 8. Make statements, invite comments 9. Jointly design ways to test disagreements 10. Discuss undiscussable issues 11. Keep discussion focused 12. Don't criticize or distract group 13. Participate 14. Share relevant information 15. Make decision by consensus 16. Do a self critique

TITLE: Beyond prince and Merchant: Local Community: **RESEARCHER:** Alan Caudill
          Seedbed of Civil Society   **DATE:** 1/16/99

Author's Key Ideas	• Rapid global change has diminished community identity
	• Invest of the common good has been over come by corporate invests
	• Government has failed to solve society's most pressing problems
	• Solution lies in building civic infrastructure:
	  - Citizen participation - proactive
	  - Community leadership - work for win-win solutions
	  - Inter group relations - peaceful conflict resolution
	  - Community vision and pride - develop common vision
	  - Capacity for cooperation and consensus building method as important as decision

Crucial Insights	Key factors: • Community works together • Engage everybody • Accountability • Shared values • Build on existing resources • Systemic change

Implications	• Consensus decision making important thread in solutions and key success factors

RESEARCH RESOURCE ANALYSIS

TITLE: WinWin: Approaching to Conflict Resolution **RESEARCHER:** Julie Robinson **DATE:** 1/16/99

Author's Key Ideas	• Conflict is a natural occurrence that is part of a larger group process of growth, development and change • "Evolution is a continuous breaking and fouring to make new, richer wholes" from "The Aquarium Conspiracy • There are models of conflict "State of Balance", development, change, conflict/crisis, new state of balance • Challenge is to find ways for new dynamic balance of all the elements within a conflict situation • Seven operating assumptions: Needs are legitimate; Resources exist; People have untapped power; Process is as important as conflict; Improving situation is different than solving problem; _____ is _____ from own perspective; Solution/resolution are temporary states of balance • Workshop models 7 conflict resolution
Crucial Insights	• Increasing power of individuals in the decision making process who have more information than ever • There are no guarantees that things will work out • Need for respect of everyone involved to come to win, win outcome • Listening is key factor in resolution
Implications	• Work can learn a lot form these models • JFK quote • Ferguson quote

RESEARCH RESOURCE ANALYSIS

TITLE: Deming's Redefinition of Management   **RESEARCHER:** Naomi Baden   **DATE:** 1/16/99

Author's Key Ideas	• Manager is critical to success of corporation, especially in a TQM setting • Self image of manager - their perception of what they do, their purpose in the company, is at the core of the problem of American decline in corporate success • Review of Deming's key concepts and relation of manager to those • Key element "inviting ees to be partners in system improvement" • Manager works on the system; ees work in the systems • Manager must provide leadership or the workers will not be able to participate • People do not cause defects in output; system does. Management can remove cause of defect
Crucial Insights	• Making all ees problem solves makes organize-ready for innovation • "Drive-out" fear - essential to trust-building • Participation without fear = quality outcomes
Implications	• "Teach ees to be problem solves" - requires skills in consensual problem finding and solving • In the broadest sense, the TQM movement in the corporate/private sector is "giving permission" to, and, sometimes, filling, the trend toward collaborative, participatory process. If ees in Fortune 500 companies believe in it, it will begin to permeate the culture of decision making • However, there's not much in this article that adds to the questions facing us

RESEARCH RESOURCE ANALYSIS

TITLE: The Myth of the Top Management Team   **RESEARCHER:** David Morrison   **DATE:** 1/16/99

Author's Key Ideas	• There are team and non-team opportunities in corporate settings
	• Executive teams are generally not teams; conditions are not right for success, team basics are not there (see below)
	• Team basics
	  - Small number of people
	  - Complementary skills
	  - Committed to a common purpose $\Rightarrow$ Difficult for top
	  - Defined performance goals $\Rightarrow$ Difficult for top
	  - Mutually accountable $\Rightarrow$ Very difficult for top

Crucial Insights	• Critical for managers to recognize team and non-team opportunities and act accordingly
Implications	• Recognize where to work for consensus and when it's not appropriate

RESEARCH RESOURCE ANALYSIS

TITLE: 7 Habits of Highly Effective People   **RESEARCHER:** Sandra Chalort   **DATE:** 1/16/99

Author's Key Ideas	• Win/win a frame of mind and heart that constantly seeks mutual benefit in all human interactions • Agreements or solutions are mutually beneficial mutually satisfying • All parties feel good about the decision and feel committed to the action plan • Seek first to understand… then to be understanding • Synergy - the whole is greater than the sum of its parts • Opening your mind and heart and expression to new possibilities, new alternatives, new options
Crucial Insights	• Win/win - a total philosophy of human interaction versus a technique
Implications	• Can use concepts to see context for interactions with team to create an environment of open-mindedness

RESEARCH RESOURCE ANALYSIS

TITLE: Building Team Power   **RESEARCHER:** Dave Thomas and Ether Bright   **DATE:** 1/16/99

Author's Key Ideas	• Power of collaboration - an organizational necessity • Basics of collaborative power - authority, responsibility and accountability • Use range of options for decision making • Think win-win, not compromise • Consensus is not necessarily unanimity • Tap the genius of the group and trust it
Crucial Insights	• It's about sharing control not losing control • Group think is the consensus of the group carried to the extreme • Have a fall back plan for polarized groups

Implications	• Solid preparation is paramount

RESEARCH RESOURCE ANALYSIS

TITLE: How to Meet, Think and Work to Consensus **RESEARCHER:** Caroline Coston **DATE:** 1/16/99

Author's Key Ideas	• Process is anything that influences the team's progress toward fulfilling its mission • Several aids might be used by the facilitator to empower team members. They include: - Positive processes list: positive processes to remind team members what they should strive for (e.g. commitment to team mission, showing sensitivity to others needs, having confidence on the process and taking risks) - Negative process list: Negative behaviors that hinder progress (e.g. violating ground rules, refusing to listen, interrupting etc.) - Resolver: A procedure to help two or more resolve disagreement (e.g. dealing with one issue at a time, each member sharing their perspective of the issue and receiving feedback from the other, brainstorming solutions) - Confronter: A form of giving feedback that is excellent for dealing with negative processes • Several other strategies also recommended included: - Creative problem solving - Detective problem solving - Scientific problem solving - Predictive problem solving - Corrective problem solving - Planning/project management - Presentation planning - Quality productivity improvement
Crucial Insights	• Most strategies required a clear, concise presentation of the issue from all perspectives, an opportunity for give and take dialogue, generating solutions (e.g. goal setting, hypothesis testing evaluation) and planning and evaluating solutions
Implications	• A skilled facilitator addressing a situation of building consensus should be open, flexible, a good listener and communicator, and should know multiple strategies that will contribute to achieving positive agreement

RESEARCH RESOURCE ANALYSIS

TITLE: The Gnat Cather Solution: **RESEARCHER:** Dennis Jennings   **DATE:** 1/16/99
        Breaking New Ground

Author's Key Ideas	• Had a set of corporate layers in place - Operated from a position that would inspire cooperation, trust and solution in the best interest of everyone • Reached beyond own company to develop a team to address issue - Involved people with various orientations • Listened with a view of really wanting to understand - Listen - Find what was reasonable - Legitimize it - Build it into a joint project • Worked to develop an atmosphere of team work and trust - Atmosphere that required high levels of empathy - Trust comes from a sincere desire to understand - Take a position of openness and candor • Spent a good deal of time establishing ground rules
Crucial Insights	
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Thomas Kilman Conflict Mode Instrument   **RESEARCHER:** Kathleen Osta   **DATE:** 1/16/99

Author's Key Ideas	• Designed to assess an individual's behavior in conflict situations • Outlines, defines 5 conflict-handling modes and suggests that all 5 serve a purpose dependent on what the given situation calls for • The instrument assesses the mix that an individual uses • Includes sample uses of each mode based on lists generated by company presidents. The score you get indicates its (the mode's) usefulness in your situation • Also has warning signals for overuse or underuse of each mode • Self-scoring
Crucial Insights	• Personal evaluation tool • 5 definitions, competition, compromise, avoidance • Assertiveness and cooperativeness matrix
Implications	• Individual and group use to raise awareness and provide a construct for greater understanding and effectiveness

RESEARCH RESOURCE ANALYSIS

TITLE: Thomas-Kilman Conflict Mode Instrument   **RESEARCHER:** Abe Ulangea   **DATE:** 1/16/99

Author's Key Ideas	• Five conflict handling modes along dimensions of assertiveness and cooperativeness • Competing - assertive and uncooperative. Individuals pursues own concerns at other person's experience • Accommodating - unassertive and cooperative. Individual neglects own concerns to satisfy concerns of other person, self-sacrifice • Avoiding - unassertive and uncooperative. Individual does not address conflict, does not immediately pursue own concern nor those of other person • Collaborating - both assertive and cooperative. Involved attempt to work with other person to find some solution which satisfied the concerns of both • Compromising - intermediate in both assertiveness and cooperativeness. Objective to find expedient, mutually acceptable solution
Crucial Insights	• Two dimensions of assertiveness and cooperativeness
Implications	• This instrument allows personal evaluation which may be of help in one's future action

RESEARCH RESOURCE ANALYSIS

TITLE: Nov. 95 "Keeping the Focus" - Successful Meetings   **RESEARCHER:** Robert Carey   **DATE:** 1/16/99

Author's Key Ideas	A. Author interviews experts to answer when, why, to involve facilitators in "decision conferences" (8-15 people) and objectives for facilitators: • Facilitator focus is "on reaching objective in the time allotted for meeting" • Helping group understand its problem before getting solutions • Getting plans for the problems Importance of knowing context around meeting (stakeholders, factions, personal agendas) rater than knowing content or topic; importance of preparing (1 hour + planning for every 1 hour of meeting time) and interviewing attendees. Discusses role of intuition: tuning into people, trusting group and process. Importance of setting objectives to use as focus/blueprint. B. Different approaches • Computer software. Analytical facilitation uses models based on mathematical probability and decision theory and prioritization. "The logical order shows attendees exactly where we are heading… and with this approach can begin consensus.." • Flip charts, unique designs for each group more intuitive and less use of models
Crucial Insights	• Must decide which approach - computer based decision-making or flip chart model (intuition model) to use

Implications	• Need for training for facilitator in both types - of approaches in order to diagnose group need

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RESEARCH RESOURCE ANALYSIS

TITLE: Cultivating Collective Consciousness… Guided Dialogue Method   **RESEARCHER:** Ingrid Bens   **DATE:** 1/16/99

Author's Key Ideas	• Expand the participants capacity to stand outside themselves and reflect on what they are experiencing in the moment
	• Process steps (greatly amended)
	  1. Objective listening
	  2. Reflecting on input
	  3. interpreting input
	  4. Connecting ideas - looking for common threads and shared sense of meaning

Crucial Insights	• In "positional" bargaining people focus on their "point" of view and barely listen to the other person. In guided dialogue, they are channeled towards fully "hearing" and reflecting on the ideas of others
Implications	• Adds a step to the consensus process of listening and reflecting in a structured way. Reminds us to focus on listening

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RESEARCH RESOURCE ANALYSIS

TITLE: Caroline Estes Workshop and Lysbeth Borie   **RESEARCHER:** Tree Bressen   **DATE:** 1/16/99

Author's Key Ideas	• Definition: "Consensus is a group decision-making process in which all present must agree before action is taken."
	• Religious version of underpinning: "There is that of God in everyone"
	• Secular version: "Everyone has a piece of the truth"
	• Consensus requires unity essence of decision is something you can support or are willing to let go forward) not unanimity (all think the same)
	• Values: love, truth, beauty
	• Requirements for consensus process to work:
	  1. Group that needs to make decisions together. Authority for implementation. Boundary of who is in the group
	  2. Desire to work together win-win attitude
	  3. Common purpose
	  4. Openness to the ideas, feelings and experiences of others, at least to some degree
	  5. Trust enough to sit in room and talk together (water can be ankle-deep at first)
	  6. Willingness to get go of some of your personal attachments in the best interest of the group, allow movement
	  7. Time enough to go in depth (but if have strong purpose and bond, then can decide quickly)

Crucial Insights	
Implications	• Transformation - revolution!

RESEARCH RESOURCE ANALYSIS

TITLE: Consent and Consensus   **RESEARCHER:** Sandy Hale   **DATE:** 1/16/99

Author's Key Ideas	• Theories of consensus: Consent a term of political philosophy; consensus a term in sociology. Consent wrestles with the issues of "freedom"; consensus wrestles with the issues of "power". • Consent and consensus overlap. Consensus refers to types of relationships - agreed upon rules of the game • Consensus involves intellectual or emotional relations to the object which may be described as agreement with it. Commitment is too strong a term to apply • HJ McClosky; "The opinion has long prevailed that consensus is needed to achieve stability, but the reverse may be the correct formulation; that is, that so long as conditions remain stable, consensus is not required; it becomes essential only when conditions are disorganized." • Other schools of thought: conflict theorists. Change through conflict resolution (Marx)
Crucial Insights	• In a democracy, the political "elite" often decide the rules of the game • Key stakeholders must buy in to a "consensus" process. Working in consensus is not necessarily giving consent to something

Implications	• Sam Kaner's work important. The point of decision overlaps but is different than "consensus". There are degrees of agreement; a continuum

RESEARCH RESOURCE ANALYSIS

TITLE: Participation Works   **RESEARCHER:** David Spader   **DATE:** 1/16/99

Author's Key Ideas	• Today's dominating idea (axial principle) is "participation"
	• Needed across culture, classes, circumstances
	• Still much to learn
	• Sometimes takes longer than other methods
	• Can be used incorrectly
	• Empowerment and meditation
	• Four results of participation
	  1. Increased performance and productivity
	  2. Predirected business mission focus
	  3. Empowered team-based implementation
	  4. Workplace environment with motivated employees
	• Critical factors:
	  1. Need maximum stakeholder involvement
	  2. Importance of leader's support
	  3. Participation can be chaotic
	  4. Participation involves matter of time

Crucial Insights	1. A right and wrong time (p. 28) 2. Still much to learn 3. "Universal" on several levels
Implications	• Evolutionary $\Rightarrow$ axial principle could change

RESEARCH RESOURCE ANALYSIS

TITLE: Managers as Facilitators   **RESEARCHER:** Marilyn Moore   **DATE:** 1/16/99

Author's Key Ideas	• Discusses managers as facilitators - pertaining to successful facilitation - one area - boundaries • Authors say: that there are boundaries in the facilitation process that must be managed in order for the group to be successful and reach consensus - types of boundaries are those: - Between individual on how to work together on element of work and imposed boundaries • Boundaries affect the ways groups interact
Crucial Insights	
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Hand Winded Leadership   **RESEARCHER:** David Koehn   **DATE:** 1/16/99

Author's Key Ideas	• Jungian topology in terms of type dynamics and type development has lots of applicability to producing effective communications (dialogue), problem solving and team building • Moreover, understanding and appreciating different thinking preferences and their associated behaviors helps reach a shared sense of each other's values (personal) • Self awareness of one's own thinking preferences allows for productive insights into one's own gap analysis for personal development • Everyone uses all aspects with thinking preferences but some are more dominant than others and lead to certain ways of focusing our energies, perceptions and making judgements
Crucial Insights	• No matter what your preference sets are for thinking, you can understand, appreciate and effectively use other thinking preferences and drive a lot better consensus

Implications	• A powerful set of competencies based on thinking preferences can be "learned" and shared as one part of the tool kit in driving out cutting edge consensus

RESEARCH RESOURCE ANALYSIS

TITLE: Managers as Facilitators **RESEARCHER:** Susan Fertig-Dykes **DATE:** 1/16/99

Author's Key Ideas	• Common definitions are key to consensus process; clarify when participant's meaning is unclear • Definition of roles in team • Confirmation of consensus. Consensus questions - Can all of you live with this? Will you support it within the group? Will you support it outside the group? • Paradigms tell us what information to consider "important" and how to use it to solve problems. (tool for sorting overwhelming amount of data) illuminate the dorbuess. Organizations trying to change their paradigm must address more than part of it (i.e. not only behaviors and activities but also vocabulary, assumptions/beliefs, values)
Crucial Insights	• Facilitators must explore their own paradigms - accomplishment $\Rightarrow$ active/take-charge fac. versus learn through group experience $\Rightarrow$ observer/inviter
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Players Find Art of Negotiation is No Game **RESEARCHER:** Bill McGee **DATE:** 1/16/99
(Newspaper article)

Author's Key Ideas	• A view of negotiation as a means to consensus • Successful negotiations involve skills in listening, understanding, patience and above all compromise • Initial negotiations may not lead to a quick consensus, but to opposing positions becoming less extreme • Negotiation to be successful requires a mutual trust • Negotiation requires both sides to clearly define areas of agreement and disagreement
Crucial Insights	• The intensity and solidity of position is clearly related to the risks at stake for either side - in foreign affairs and nuclear war issues - the negotiation is not a game
Implications	• In trying to facilitate a consensus no matter what the method used, the facilitator must have a clear understanding of the nature of the risks at stake for all vested and involved parties

RESEARCH RESOURCE ANALYSIS

TITLE: Memory and Reflections on TWM's **RESEARCHER:** Bill Bailey **DATE:** 1/16/99
Work on Consensus

Author's Key Ideas	1. Consensus is a life method 2. Consensus is made possible by a needed and well articulated task that has a high significance to the people involved 3. Consensus is neither agreement nor imperative - it is the indicative 4. Consensus is the indicative that arises from a major contradiction that blocks a groups movement toward completing its task 5. In the consensus method (process) one person states what they "hear" is the consensus - if it is not the consensus - than others are invited to "state the consensus" until the whole group hears "what the consensus" is 6. Everyone around the table and/or in the room is there because they intend to reach a consensus on how best the task can be done 7. If you say no to someone else's articulation of a consensus you do so by stating what the consensus you hear being called for by the group 8. Coming to consensus requires that everyone listens
Crucial Insights	• Consensus is related to task • All participants desire/intend to reach consensus • Clear articulation of the contradiction gives permission for consensus to happen
Implications	• We are always operating our lines out of a consensus - but most of the time our life context is so small tat it can become "my consensus is - I want to have my own way" instead of a larger context that speaks to the

	next step of the whole (human)journey
	• Method: ORID can lead a group into a consensus

RESEARCH RESOURCE ANALYSIS

TITLE: Strategies for a New Age   **RESEARCHER:** Mary Wong   **DATE:** 1/16/99

Author's Key Ideas	• Why if we have managers more skillful and sophisticated about relationships (question this "fact") are our employees not more committed and happy? Do we make decisions more easily or significantly better? • 2 approaches to integration of organizations other than direct control: alignment and attachment • Alignment: Low trust and depersonalization engendered by more elaborate attempts at control alienate; We aspire for higher purpose. But even organizations with noble purpose but are dictatorially overwork its employees for the cause are not effective; there is an illusion of control and autonomy in organizations • Attachment: human love, empathy, understanding, caring, nurturance and support, which are largely denied and repressed in organizations; Resonance among the parts of a system - energy that connects us together • New leaders: caring, respectful, positive attitude toward people, willingness to share powers (Michael Maccoby, 1981) • What is meaningful?
Crucial Insights	• Inhumanity is not just a controlling leader but the stressful environment of inbalanced worklife to personal life • We are interdependent and independent • Our unintentional denial of our humanness in business (downsizing, layoffs) • Individual sense of meaningfulness; a leader leads easily when there is enough overlap of similar common meaningfulness
Implications	• Consensus - prerequisites are a recognition of our interdependence and our caring/understanding of our "positions" and "stakes" • Another factor towards consensus is the common building/acknowledgement of meaningfulness of purpose, intent and probability of effective solution towards intent

RESEARCH RESOURCE ANALYSIS

TITLE: Teaming for Quality Improvement   **RESEARCHER:** Evan Bloom   **DATE:** 1/16/99

Author's Key Ideas	• You can measure any human actin that you can observe • Groups and processes do not act - people do! • People are creatures of integrity • The quality process does not have to start form the "TOP"… endorsement is enough • Techniques serve the purpose, not the other way around! • The process will set you free • Match the people to the topic… never match the topic to the people
Crucial Insights	• Author's emphasis on Quality Improvement Process and tools for identifying individual perceptions on implications for non-business processes. Importance of identifying "what is excellence" highlighted and helpful tools provided
Implications	• Attaching accountability to an individual is problematic if you are tying to get buy-in to a consensus-teaming process. Accountability of "teams" or "consensus groups" may be more powerful

RESEARCH RESOURCE ANALYSIS

TITLE: The Consensus Industry   **RESEARCHER:** Mike Kaplan   **DATE:** 1/16/99

Author's Key Ideas	• There is growing use of outside facilitators to help reach agreement complex and difficult issues • Sometimes facilitators are called mediator or negotiators • Citizens in local communicates want to be involved "somehow" in decisions that affect them • Local governments are seeking help in a 3rd party way on contentions issues • Facilitators create environments in which people can work together to sort out view points. A facilitator doesn't push a point of view • Facilitators manage agendas and dialogue • The facilitation process takes time
Crucial Insights	• Intervention needs to occur sooner rather than later • Credibility us the manager of a structured process is vital as the facilitation profession evolves

Implications	• It's important to agree that facilitators are not arbitrators, dispute resolution specialists or negotiators • An ethical issue is emerging about how facilitators sell services

RESEARCH RESOURCE ANALYSIS

TITLE: Use of Third Party Now Second Nature **RESEARCHER:** Deb Courtner **DATE:**

Author's Key Ideas	• Increasing use of facilitators in government meetings - Used for stalemates, including effort to find a replacement for decaying Woodrow Wilson Bridge, future of Route 301, cabinet members/leader meetings • Some disadvantages, according to some - facilitators slow down decisions and run up costs • Facilitators showed upon government scene in 1980s to head off lawsuits • Why facilitation works: No one understands problem better than people who experience it and no one knows the solution better tan the people who are going to have to live wit them • Facilitator is supposed to be impartial. Neutrality encourages people to open up • Danger is that facilitators are seen as panacea, but can't succeed without broad-based support
Crucial Insights	• Facilitation must be accomplished by broad-based support to be successful • People who live with the problem understand it best • People who know solutions better are those who will have to live with them
Implications	• In the facilitation process, be sure to involve both people involved with the problem and people who will be affected by the solution. Otherwise any consensus reached won't have support

RESEARCH RESOURCE ANALYSIS

TITLE: Independent Mediators Becoming Common in Government Processes **RESEARCHER:** Ellen Flynn-Heapes **DATE:**

Author's Key Ideas	• When time being wasted because stalemate over conflicting sides • Referee the debate • Conflicts in society hard to make decisions • Head off lawsuits • Broad-based support • Rise of citizen activism • Commitment to battle
Crucial Insights	• Process-oriented, not results-oriented
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Working with Organizational Culture: Managing Culture Change **RESEARCHER:** Valerie Weisman **DATE:** 1/16/99

Author's Key Ideas	• Culture change is deep change and often not sought out overtly • Understanding an organizations culture and defining desired change is a key first step • Put desired changes in as concrete teams as possible: variances to be overcome; what ability the organization must acquire - what it must learn, know and be able to do to eliminate gaps/variances • Choose a style of intervention to fit the culture (e.g. security or role bound cultures) • Balance fear of loss (changing culture) of need to grow (e.g. any change is likely to take away current values and gratification before producing satisfactory substitution) (Kubler - Ross model of change is helpful) • Pace is important: strategy of punctuating change with "castle (security) time" & "battlefield time" (change) • Engage in "information overkill" and "discussion arenas" and identify change - champions. Institutionalize learning provide CIS (change information systems) to provide concrete and distributing information throughout system • Use TID to support/promote learning (as an outgrowth/adjunct - not a substitute for real change) • Create organizational structures to support change - (e.g. localize decision making) management deployment resources
Crucial Insights	• The above strategies help create understanding, collaboration and appropriate buy-in for change • Go for "small wins" versus big breakthroughs

Implications	• Tie in with building collaboration/consensus is paying attention to and working with realities of organizational culture

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RESEARCH RESOURCE ANALYSIS

TITLE: Cooperation and Competition Among Primitive People **RESEARCHER:** Tom Rogers **DATE:** 1/16/99

Author's Key Ideas	• Cooperative social systems - societies in which the distribution of goods enrich the whole group and contribute to its security • Competitive social systems - societies in which such goods is a major competitive activities
Crucial Insights	• There is no correlation between the preporce or absence of group work with the actual situations imposed by a particular technology • There is no correlation at all between major emphases and a classification of cultures into food-gathering, hunting, agricultural, or pastoral peoples
Implications	• There is a correspondence between a major emphasis upon cooperation, a social structure which does not depend upon individual initiative or the exercise of power over persons, a faith in an ordered universe, weak emphasis upon rising status and a high degree of security for the individual

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RESEARCH RESOURCE ANALYSIS

TITLE: National Managers Handbook **RESEARCHER:** Cynthia Miller **DATE:** 1/16/99

Author's Key Ideas	• "Knowing when to turn a group/individual for decision making can be critical to organization effectiveness"
	• Criteria for best results for group decision making - 5 factors to consider
	  - Nature of task
	  - Importance of acceptance of decisions or commitment to a solution for its implementation
	  - Value places on quality of decision
	  - Competence, involvement, roles of each person implementing decision
	  - Anticipated operating effectiveness of group - especially leadership
	• Looked at assets and liabilities of groups

Crucial Insights	• In relation to using consensus for decision making the more participation by others the more at stake people will have in out come - however that "outcome" will require continuing "buy-in" by stakeholders to continue to be effective
Implications	• Brining a group together and then disbanding with out regular follow up and "pulse" on consensus decision the outcome may become less effective or discontinue if consensus is not continually follow over "how" things are doing

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RESEARCH RESOURCE ANALYSIS

TITLE: Heart of Team Building **RESEARCHER:** Cynthia Miller **DATE:** 1/16/99

Author's Key Ideas	• Does team building and process for developing merit managers needs - heart of team building, surfacing, exploration, resolution
	• Defines resolution with several possible meaning (not all indecision)
	  - Discovery of agreement or apparent disagreement
	  - More empathy with other person's position, style, point of view
	  - Genuine respect and acceptance of _____

Crucial Insights	• Defining resolution – describes consensus process as I see it

Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: The Jesuits   **RESEARCHER:** Mary Ann Simcoe   **DATE:** 1/16/99

Author's Key Ideas	• This history of the Jesuit order (16th c.) • Jesuits have combined "two contradictory goals… discipline and individuality" (Part III) • Jesuits had ability to "make friends out of the heretics and the enemies of the church" used theater toward this end (Part VII, p. 126) • Chapters on missionary activity describe how they worked form within a culture
Crucial Insights	• This book requires complete reading to find the "nuggets of insight" around Jesuit practices and success with decisions making methods and authority
Implications	• Sounds like Jesuit practices may be worth more research

RESEARCH RESOURCE ANALYSIS

TITLE: Leading Teams, Mastering the New Role   **RESEARCHER:** Mary Ann Simcoe   **DATE:** 1/16/99

Author's Key Ideas	• Effective group decision making is the heart of teams • Has continuum of "leadership" and types of decision making (i.e. explain decisions, get input for decisions, facilitator and support team decisions) • Defines consensus and when it is appropriate: "any time you must gain the commitment of the whole team to a workable course of action" • Basic facilitation tips
Crucial Insights	• Focuses on setting guidelines for the decisions and referring options for action back to the decision guidelines • Asks each participant to speak to their commitment • Manager must support and not countermand the ensuing decision to maintain trust and commitment
Implications	• This addresses small work teams, not larger scale bodies • Pretty basic stuff, doesn't address sticky-issues and how to work through them

RESEARCH RESOURCE ANALYSIS

TITLE: Managing Conflict   **RESEARCHER:** M. Gesome   **DATE:** 1/16/99

Author's Key Ideas	• Researching interpersonal conflict in organizations
	• Factors
	  - Inhibitions toward expressing emotion
	  - Emotional energy needed to deal with situations
	  - Risk/fear
	• Positive value
	  - Increase motivation
	  - Promote inncretia
	  - Increased understanding because of better position articulation
	• Dialogue = parties directly engage each other and focus on the conflict including aspects of their relationship
	• Trend
	  - Less tolerance for individually oriented versus company oriented behavior
	  - Team orientation: flatter
	  - Higher premium on interpersonal skills i.e. communication and conflict management

Crucial Insights	• Paradox: focus on group or organizational goal requires even more focus on individuals skills (?different skills?) • No more shining stars – group rewards?

Implications	• Trust versus fear • Paradox • Ground rules

RESEARCH RESOURCE ANALYSIS

TITLE: Leading Teams   **RESEARCHER:** Gary Forbes   **DATE:** 1/16/99

Author's Key Ideas	• Role of decision facilitator
	• Power of giving information away
	• Unanimous decision - con - group think (agree too quickly); con - too much time (tiredness)
	• Consensus - all team members openly express commitment to implement the decision; Disadvantages: 1 - takes time, 2 - takes facilitation skills
	• Getting to consensus: indicators
	  - "I've heard their positions"
	  - "I believe they've heard me"
	  - "The decision doesn't compromise my values"
	  - "I can support the decision"
	• Process steps:
	  - Describe the decision to be made
	  - Explain why consensus is needed
	  - Determine guidelines for the decision
	  - Lead an evaluation of the options
	  - Help the team make their decision (summarize/state options)
	  - Get each team member's commitment to the decision
	  - Plan action steps and follow-up

Crucial Insights	• 4 facilitator skill arenas:
	  - Prepare team for a focused meeting
	  - Encourage diverse points of view
	  - Handle disruptive behavior
	  - Keep team focused and moving

Implications	• Good general description • Acceptable basic, simple defu statement - "All team members openly express commitment to implement the decision"

RESEARCH RESOURCE ANALYSIS

TITLE: Education Piece Based on: **RESEARCHER:** Michele Craig   **DATE:** 1/16/99
Deming's 14 principles of a Theory of Management

Author's Key Ideas	• Taking the long view is valuable in every step of a process • Eliminate barriers among/between those in each step of a process • Teamwork is key to best results - but many institutions do not include a method for rewarding teamwork cooperation • A constancy of purpose understood by all within the organization • Each theory must be accepted by those in the organization to be successful • In discussing each of the 14 points as they relate to education systems, the author notes that it's everyone's job - everyone in a system must buy-in and participate in transformations, processes, communication • Article's shortness limits its effectiveness
Crucial Insights	• Teamwork/agreement of purpose • Discussion among those in process • Key to success

Implications	• Consensus necessary to achieve greatness process

RESEARCH RESOURCE ANALYSIS

TITLE: Winning Through Participation   **RESEARCHER:** Cecelia Fletcher   **DATE:** 1/16/99

Author's Key Ideas	• A rule of thumb in arriving at consensus is you never criticize or reject someone's model or articulation of consensus unless you present a better one. Ask for alternative suggestion rather than reactions, until the group responds affirmatively. This gives creative rather than destructive dialogue (this guideline is stated up-front).
	• Sees two dimensions in the team experience:
	  - Journey toward consensus - participation
	  - Journey toward action - urgency and commitment

Crucial Insights	• Requires dissidents to take responsibility for moving process forward
Implications	• Requires more dialogue, but facilitates understanding and buy-in • The meeting issue becomes the group's issue and increases enthusiasm to get the job done

RESEARCH RESOURCE ANALYSIS

TITLE: Managing Cultural Diversity   **RESEARCHER:** Frances Soloway   **DATE:** 1/16/99
          in the Public Schools

Author's Key Ideas	• The workforce is becoming increasingly diverse - complexities of ethnic, gender, age, cultural and linguistic • There will be fewer workers entering the job market, resulting in a shortage of labor • As labor becomes a scarcer resource, and a more diverse mix, management must learn new skills to honor the diversity, and to serve as a standard for employees to respect and honor one another's differences (the melting pot phenomenon no longer cuts it) • This will be critical for quality performance
Crucial Insights	• Potential for conflicts • Potential for real synergy from respecting differences and what the differences can contribute to the whole of the organization
Implications	• Crucial to get the diverse work force to work will together. Strategies for consensus building conflict resolution, understanding differing perceptions, styles, strengths and skills are vital

RESEARCH RESOURCE ANALYSIS

TITLE: 50 Ways to Build Team Consensus   **RESEARCHER:** William Irvin   **DATE:** 1/16/99

Author's Key Ideas	• Consensus is both the process people go through to arrive at a mutually agreed-upon decision as well as the product of such a process • The process of thinking together, assuring everyone that each perspective is heard, and moving toward a decision is also a consensus • Purposeful vision - concepts/strategies related to enhancing the team's awareness of the big picture • Participative processes - concept/strategies related to enhancing/balancing the level of participation of team members • Individual commitment - concept/strategies related to enhancing/balancing the buy-in across team members • Collaborative teams - concept/strategies related to getting strong-willed, semi-autonomous teams to collaborate on a task/project
Crucial Insights	• Direction is the end focus, the common picture of where people want to be. People expend energies toward this end product. A common direction funnels people's attention and their endeavors. Agreement on the focus or direction is critical in setting the stage for consensus. • There is a growing sense that human resources are perhaps the most valuable asset an organization has.

	What are called for are ways to tap the wisdom and creativity of the entire staff. One way to do that is to create connections between individual aims and whole organizational goals
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Reconciliation   **RESEARCHER:** Fran Lowe   **DATE:** 1/16/99

Author's Key Ideas	• Struggling over our differences $\Rightarrow$ conflict
	• Biblical
	• Treat reconciliation as the costly action that it is
	• Roadblocks to harmony/dividing walls
	  - Isolation, injustice, exhaustion, betrayal (offer words of commitment with no follow through), denial of bigotry
	• Reconciliation begins with self-examination
	  - How can we become more accepting of other? How bigotry affects our relationships, our motivation? Build mutually fulfilling relationships?

Crucial Insights	• Reconciliation begins with self examination • Know our motivations
Implications	• These ideas can be very helpful in facilitating consensus for others • Knowing ourselves can help us keep centered and objective

RESEARCH RESOURCE ANALYSIS

TITLE: On Conflict and Consensus   **RESEARCHER:** Rebecca Van Marter   **DATE:** 1/16/99

Author's Key Ideas	• If war is the violent resolution of conflict, peace is not the absence of conflict but the non-violent (both personal and physical) resolution of conflict
	• In the dominant culture we have a predisposition to "rush to closure". What is important, however, is not the decision per se, but the implementation of the decision
	• This book outlines an alternative to parliamentary procedures (i.e. it could be considered the "Robert's Rules of Consensus)
	• The key premise are:
	  - It is the individual's responsibility to raise concerns and the group's responsibility to honor and resolve concerns
	  - The question which ascertains consensus lie defines when consensus is reached is "Are there any unresolved concerns?" The absence of unresolved concerns = consensus
	• Outlines: structure/process; group roles; facilitator roles; etc.

Crucial Insights	• Consensus $\neq$ no conflict, unanimity • Consensus = all concerns resolved
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Getting to Yes   **RESEARCHER:** Tanya Treadway and Mark Willaims   **DATE:** 1/16/99

Author's Key Ideas	• Separate the people from the problem
	  - Negotiators are people first
	  - Ask yourself: "Am I paying enough attention to the people problem?"
	• What if one side is more powerful
	  - The cost of using a bottom line

Crucial Insights	• People see the world from their own vantage points and frequently confuse their perceptions with reality • A bottom line inhibits imagination. Bottom line may be to high or to low

Implications	• Failing to deal with others sensitively as human beings can be disastrous for a negotiation
	• Could accept an agreement you should reject or reject one you should accept

RESEARCH RESOURCE ANALYSIS

TITLE: Team Management   **RESEARCHER:** Rebecca Van Marter   **DATE:** 1/16/99
Leadership by Consensus (Chapter 5 Decision Making)

Author's Key Ideas	<u>Who shall decide and how</u>?
	• Decision making most important administrative function
	• Quality - largely a function of group's decision making ability
	• Unilateral versus multilateral
	• Decision process monitoring system - nature of the problem dictates who can solve it
	• Questions to consider preparing decision:
	   - Is it executive in nature?
	   - Is administrator willing to accept the risk of sharing the decision making responsibilities with the group?
	   - Is sufficient time available for the group to reach a decision?
	   - Is more information needed?
	   - Is group participation justified to achieve ownership, commitment and allegiance to decision?
	
	<u>Decision making modes</u>
	• Question of who and how is critical and often source of conflict
	• Decision trees, process-analysis and matrixes are helpful. Series of highly related and interdependent events:
	   - Relevant information
	   - Definition
	   - Diagnosis
	   - Criteria for solution
	   - ID options
	   - Evaluate options
	   - Selection of solution
	   - Implement solution
	   - Evaluate solution
	
	<u>Research</u>
	• Group decisions better than individual especially when problem is ambiguous
	• Commitment and flexibility of participants is important
	• Leadership impact significant
	• Positive impact of group decision making - increased productivity, reduced resistance to change, increased motivation, increased job satisfaction, increased teamwork, increased commitment to decision, decreased complaints, etc.
	
	Hazards of group decision making
	• Time and energy
	• Crisis problem solving
	• Loss of control
	• Group "think"
	• Premature closure
	• Countervailing strategies - use outsiders, encourage divergent views, NGT, Delphi

Crucial Insights	• Consensus places responsibility at the point it needs to be placed at the appropriate times • Permits manager to design, monitor and fine-tune decision making - key for effective management

Implications	• One implication (I disagree with) and stated by the author is leadership by consensus is a tedious process

RESEARCH RESOURCE ANALYSIS

TITLE: Facilitator's Guide - Using "Gradients of Agreement" **RESEARCHER:** Bill Yoder and Anne Pelliceiotto **DATE:** 1/16/99

Author's Key Ideas	• When seeking consensus:
	  - Clearly state the decision statement
	  - Poll the group to assess level of support
	  - Hear the issues/concerns of those who would block
	  - Work with the group to address issues
	  - Gradually refine position statement to help group move toward endorsement

Crucial Insights	• Focus needs to be on addressing the primary concerns of blockers • We've have good luck using this tool with self-directed teams
Implications	• Very useful tool for leaderless or weak leader teams • Avoids majority vote and win/lose decisions

RESEARCH RESOURCE ANALYSIS

TITLE: A New Age for Business **RESEARCHER:** Joseph Slye **DATE:** 1/16/99

Author's Key Ideas	• Love and caring in the workplace. Companies like AT&T, P&G, and DuPont offer personal growth opportunities for employees - an "attempt to deal with a very difficult time" • A host of management theories and practices has emerged to include hierarchical organizations being replaced by "flattened" organizations, as well as organizations using group learning, creativity and intuition in decision making; love and caring being recognized as motivators. All this represents a fundamental shift. Customers and employees are at the center of the new universe. It is all about relationships. Business has to be conducted differently • People are being seen as having full potential. Managers are acting more like coaches, facilitators, role models • Employees are being treated (in successful companies) like team members. Concern of inclusion is developing • Basic values are returning to the workplace
Crucial Insights	• The new paradigm for businesses has arrived - relationships • In the great need for speed, bureaucracies are unwilling • Idealism is on the new agenda • Management must have a humanistic bent • Successful corporations are incorporating spiritual values in their work
Implications	• More inclusion; empowerment - means more use of consensus decision making

RESEARCH RESOURCE ANALYSIS

TITLE: Team Management: **RESEARCHER:** Howard Smith   **DATE:** 1/16/99
         Leadership by Consensus

Author's Key Ideas	• Distinguishes between personal and positional power • Focuses on leadership as exerting influence over others by joining with others • Power is not zero-sum but expands as it is shared • However, defines consensus as "agreement to implement management decisions on part of all members." • Emphasizing difference between support from agreement Recommended: • Building united judgement: A handbook for consensus decision making
Crucial Insights	
Implications	

RESEARCH RESOURCE ANALYSIS

TITLE: Participatory Decision Making: **RESEARCHER:** Howard Smith   **DATE:** 1/16/99
         Tools for Reaching Closure

Author's Key Ideas	• Sam Kaner in his pre-conference spoke well on the process of decision making • He saw three components: Discussion $\Rightarrow$ Decision $\sqrt{}$ $\Rightarrow$ Implementation • He was disinclined to sue the term "consensus" and referred to unanimous agreement • The difficulty of reaching agreement was often the confusion between "are we discussing?", "have we decided?", and "are we ready to implement?" • The responsibility of the facilitator is to make explicit the process the group will use to identify which phase the group is in and when they are moving on
Crucial Insights	• Be explicit in process • "Temperature-take" (straw poll often) • Allow the "proposal" to evolve and reformulate as agreement and understanding build
Implications	

1999 IAF Think Tank

The Art and Science of Consensus:
RESEARCH FOLLOW-UP

ACTIVITIES: *What next steps do you suggest?*

- More in-depth research done before workshop
- Share more stories - put into practice
- Each of us do share a method sheets throughout the year
- Documentation
- Consolidate information and research to-date into a compendium to give to participants next year
- Research YWM's wisdom on consensus
- Put the findings online and make them available through GRP-FACL archives, could also invite additional input
- Video - great case study, would like group to discuss cases (success/failure), what was applied form '99, what worked, what didn't work
- Distributing materials; synthesize gems and share more widely
- Summary follow-ups
- List serve dialogue
- Contact TC Butler and find out what his association of consensus builders is doing and how to connect
- Ongoing feed-in - maybe via internet, not a list serv but a receiving of data to incorporate into the body of research
- Let's get a core group to review notes from prior think tanks prior to Think Tank III
- Let's set a collaborative agenda prior to Think Tank III (perhaps through listserv)

THINK TANK III: *What should be the focus at Conference 2000?*

- ID 4-6 topics and let the small groups work longer to produce a more thorough product
- Maybe some of the same - but maybe half-day on tools/techniques/methods
- Continue the same focus
- Ideas to address the challenges of consensus that was generated today
- Build on "where we are today"
- How can technology be used to enhance the consensus-reaching process?
- Do more of the same but take a next step toward definition; maybe after reviewing the output from this year
- Have several of these offered as concurrent sessions
- Stories/case studies
- Continual review of literature - synthesis
- Expand tool box details
- More time on tools
- Use data from today to build on
- Repeat this session and have second shorter session that could be attended by today's folks and others to share more ideas
- Trends in participant group attitudes and responsiveness to facilitation? How can we be sure of consensus and ensure "spirit" and energy of reacting to each other in electronic facilitation?…

PARTICIPATION: *How do you wish to be involved in the future?*

15   I wish to be informed on follow-up steps. (15)

10   I would like to attend Think Tank III (10)

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