

SMILE Project 2004/05 – SEEding for Multiethnic and Intercultural Learning Experiences

Participatory Methods for Shaping Our Realities

IIZ/DVV – SEE Regional Office



Impressum

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Foreword

This training package is a distillation of ideas from many different approaches and projects, from hundreds of people. It is intended to give the trainer a handful of exercises from which they can design workshops around the topics of their choice. It is intended to provide a base from which people create interactive workshops that draw upon the resources of the participants, as well as the trainers.

This publication owes a great debt to other authors. The section on moderation was heavily based on a series of modules designed by Gernot Graebner, with additional material taken from the History Project, and the TUM Project (Tolerance and Understanding: Our Muslim Neighbours in Europe).*

The section on the World Café has been reprinted with permission from the World Café Community Foundation. The chapter on the Future Workshops is heavily based on the work of its originators, Robert Jungk and Norbert Müllert, along with practical experiences in our workshop in 2004. The section on Open Space Technology was inspired by the work of Harrison Owen, the Open Space Mailing List, and from our own experiences at the SMILE Project Open Space in March 2005.

The first half of this book is targeted at beginners, or as a “refresher” for experienced moderators. It introduces the basic goals, principles, and tools of the process, along with how to prepare for moderated events. The second half of this book is a toolkit of some interactive methodologies designed for problem solving and change management, which builds on the skills described in the first half.

All of the approaches featured in this document have been used successfully in the past in order to foster dynamic and free-flowing discussion on topics as diverse as history teaching, community development, and intercultural learning.

Every trainer is free to use what they feel is right for their specific events, and can adapt or change the rest to suit their needs.

We wish many productive events and the tenacity to participate into shaping our realities the way we envision them to be.

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke extending to the right.

Johann Theessen
Regional Coordinator

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1. Essentials of Moderation

1.1. Roles, Rationale, and Definitions

Introduction to Moderation

In the context of this training package, moderation will be defined as a process through which an individual can support the creation of attitudes and the decision making in groups. Typically, moderators perform a variety of functions, from enforcing common rules for discussion, to visualizing and outlining the procedure and the discussion. In some cases, it may be the moderator's responsibility to participate actively in the creation of content, while in other cases, it may be more important for the moderator to facilitate and provide structure without intervening in the contents of the discussion.

The first half of text is dedicated towards providing a general overview of moderation, along with the basic skills necessary to create moderated events and to act as a moderator. By the end of this section, the following questions will be addressed:

- What does moderation mean for us? What do we understand by the term, "moderation" ?
- What can moderation accomplish ?
- Which roles do the moderators play ?
- What kinds of techniques are used ?
- What rules or guidelines do moderators have to heed ?
- What do you need to think about during the preparation and planning process ?
- How does moderation take place ?
- When and where is moderation useful ?
- What does moderation mean ?

Reasons for Unsuccessful Communication

In many cases communication does not achieve:

- Clarify the issue for all participants
- Use the experiences, the knowledge, and the competencies of all group members
- Make the process of decision-making and the results transparent
- Find out whether the results are accepted by the participants
- Take into consideration the needs and points of view of the individuals involved
- Get the employees and team members involved enough that they are ready to support the decisions and want to do further work on the discussed problems and issues

These communication problems are generally not caused by bad intentions, but rather, by insufficient communications skills and misperceptions. The issue, however, is that methods which can improve on communication are often unknown, or do not get used appropriately.

The moderator's role is to know and use those methods of communication, and pay attention to what individual participants want, and to assist all participants in expressing themselves.

Contributions of Moderation

Moderation describes the process of developing and supporting a positive group environment. Some key features of successful moderation include:

- Making decisions more transparent
- Motivating the group members to be creative
- Fully utilizing the knowledge and competencies of each person
- Facilitating the acceptance of group decisions
- Simplify the decision-making process
- Improve the motivation and satisfaction of the participants

Moderation is generally designed for group processes. These can include office working groups, special corporate teams, training workshops, sports teams, quality assurance circles, dialogue groups, conferences, etc. Moderation can be used for small teams, or large ones. While the specific activities may differ, the core underlying principles should remain the same.

There are, however, limits to what moderation can accomplish. It cannot create radical change, though it can facilitate discussion, which leads to action that creates change. That being said, as moderation is a group process, it is limited specifically by the group, and what actions the group is willing to take in the long run.

In most cases, moderation is intended to bring about a democratic decision-making process, where all members of the group contribute towards the final product (though in some cases, such as an online community or on-going dialog group, the product is the process). Through this process, the moderator can allow participants to fully use the knowledge and competencies, motivate the group, and help people visualize and see the process of arriving at the final output. In this way, decision-making becomes simplified, and the group can be more accepting of the results.

The Role of the Moderator and the Participants

The roles that the moderator and the participants play, and the situation itself, takes place within a specific context. These factors include:

Environment – moderated situations are integrated within an environment that contains institutional interests, which may be opposed to each other

Topic – moderated situations need a clearly defined topic

Moderator – all moderators bring in their personal experiences, and their background

Group – all moderated situations take place in groups, and the forming of the group may need to be supported

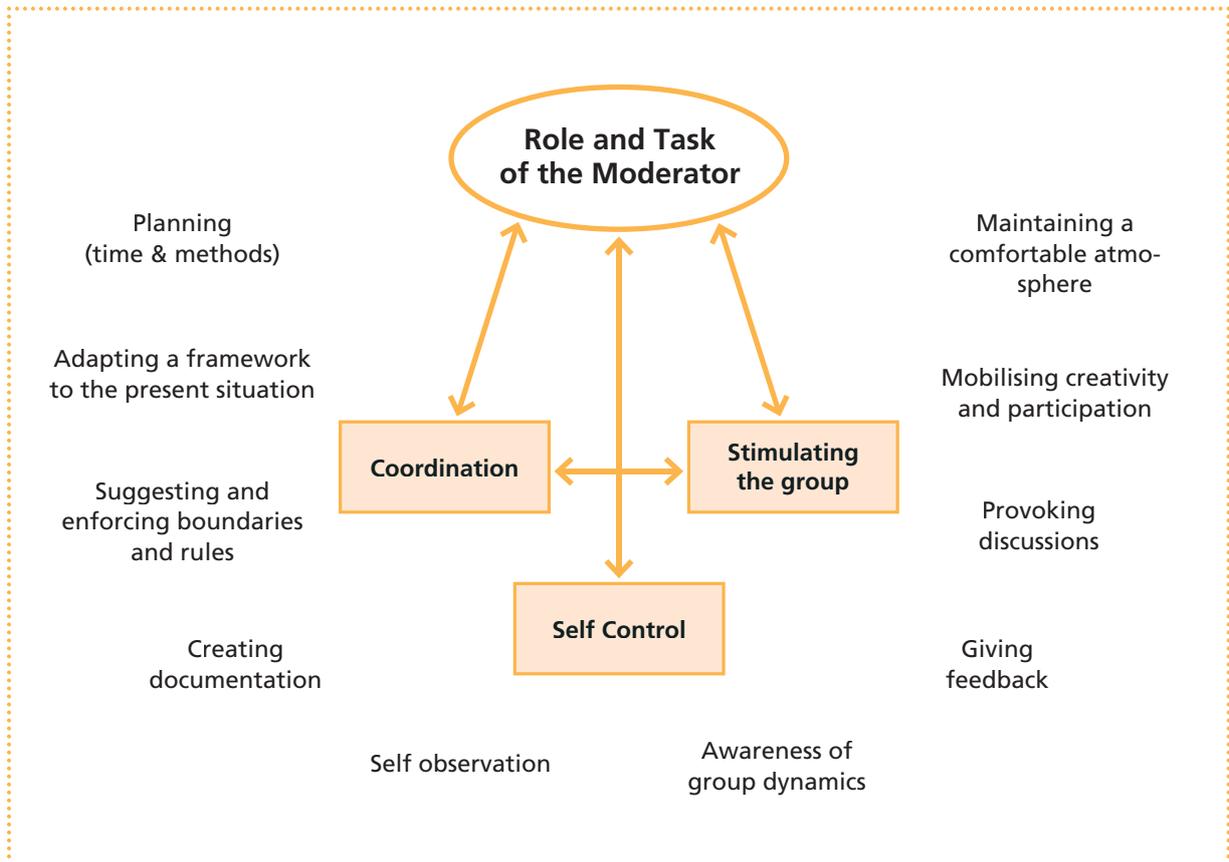
Methods – different methods may work best with different types of groups

The moderator needs to keep in mind the interrelations between all of these factors. The topic should be significant for group, and it may be the moderator's responsibility to demonstrate the significance for some members of the group. In addition, the methods used should be suitable for the group, and the level of tension within the group. The moderator also needs to be accepted as a competent and impartial party by the group, and the moderator must be able to retain that status, even in the face of potential challenges.

■ The Moderator

The moderator plays several general roles, which can be summarized as follows:

- Defining the framework for group action
- Demonstrating different ways of framing and solving problems
- Improving the ability of the group to function
- Visualising group products
- Making problem solving more transparent by outlining the train of thought
- Making sure that all participants abide by the rules of the discussion
- Leading the group to democratically-derived results



- Challenging the group members to bring in their own skills and competencies, and to perform to the best of their ability
- Enabling reflection
- Facilitating communication between participants
- Reflecting on their own performance and influence in the group process

It should be important to note that the moderator is not the “boss” of the group. He is there to steer and support the group process. Support, in this case, refers to the organisational environment, group dynamics, and the formation of opinion.

In order to do this, it is important for the moderator to keep out of the topic, while respecting and appreciating the competencies of group members. Moderators, on one level, need to trust in the autonomy of participants. They are there to assist them in methodically solving the problem, while staying out of the decision-making process. In order to do

this, moderators should try to relate to individual participants on a personal level, and not simply in the professional capacity. Hence, they should try to perceive the emotional well-being and attitudes of all group members, though it is important to define some limits to emotional expression. Conflicts need to be addressed in a transparent fashion, so that they do not stop the group process.

The final point mentioned in the list above, that of self-observation, makes high demands on the moderator. In addition to identifying his or her own strengths and weaknesses, the moderator has to identify blind spots and misperceptions which can stall a group process. Problems can arise if the moderator is not aware of certain signs and interactions within the group, such as ongoing conflicts or disagreements. Such misperceptions are, of course, some of the key reasons for the failures in communication discussed above.

Since moderation can be applied to a variety of different situations and contexts, it is impossible to come up with firm rules for moderation. Some guidelines, however, can be summarized as follows:

- The role as a helper of the group suggests that the moderator promotes the group process through questions
- The moderator does not declare his own opinion on a conflict through content-oriented “statements”.
- The moderator does not judge the opinions or feelings of the group, but reflects them back so that the group can fully visualize and understand what they are saying
- The moderator allows the group to proceed in its own way, but within the framework of agreed-upon rules
- The moderator speaks in “I statements”, for example, “I think ... I feel ...” Through that, he shows responsibility for his own actions.
- The moderator identifies disturbances as a priority, and takes effective action.
- The moderator acts flexibly in response to the group process.

■ The Participants

People have different ways of participating in learning events. Some participants tend to be very active, and will try to have a strong influence on the learning process. Other participants will be passive, looking to receive information from the moderator, and other participants.

Active participation can be defined in a number of different ways. In general, someone is considered to be participating actively if they bring their personal skills and competencies to the discussion, if they actively communicate and listen about the topic, and finally, if they bring prepared materials with them. Individuals may choose to participate in some, all, or none of those ways.

The activity and interest of the participants can be influenced by a lot of factors, including (but not limited to):

- The significance of the topic to the participant
- The rest of the group
- Their own interests, needs, and communication style
- Their individual learning habits and strategies
- Language proficiency

It should be noted that choosing to actively participate in a moderated event is not always a conscious decision. Also, the moderator is not there to force or compel participation in the learning process, though he or she has control over the choice of media, methods and techniques, and can offer suggestions for practical application of the topic.

1.2. Developing Your Own Moderated Event

First Steps for Moderators

A moderation includes every step, from the planning up to the evaluation. The moderator should be able to address all of the following questions:

■ Information

- Are there enough pieces of information about the kind of moderation?
- Are the organizers aware of what to expect from moderation?
- Is there sufficient information on the participants and their interests?
- What is the goal of the moderation?
- What are the expected results, from the organizers, the participants, and the moderator?
- Will I be able to understand the technical language or jargon of the topics under discussion?
- Can I remain neutral, or am I affected by the topic?

■ Planning

- Can planning begin based on available information?
- What type of planning will be the best?
- Is there enough time for the planning?
- What “milestones” will there be for the planning process?
- Will I moderate by myself, or should I assemble a team, with a co-moderator and support staff?

■ Phases in a Moderation

In general, even though context, participants, and content will differ, a moderation will tend to have the same general structure. Like a narrative, a moderated activity will have a beginning, middle, and an end, which can be described as follows:

a) Introduction to the Event

In the first phase, the meeting is convened, and the participants will be welcomed. The right atmosphere can be created through appropriate warm up activities.

The moderator should also name the topic of the meeting, introduce the agenda, and explain the planned procedures. If the participants do not know each other yet, they can have the opportunity to talk to each other and do so.

This is also the appropriate time to ask participants for their expectations, and to formulate the specific goals of the meeting. Finally, rules for cooperation and working together can be established.

The beginning of most moderated events can be similar, as all such events will have similar starting goals. People need to be introduced, the topic introduced, working methods established, and so on.

b) Creating Content

The middle of a moderated event is where things diverge, depending on the goals of the event. If the event is designed as a training, then the goals will be already established, and the general expectation from the participants will be to learn new skills.

On the other hand, a problem solving or community development event will require input from the participants in terms of defining objectives, selecting areas of action, and creating actual content (i.e. a programme of action).

In such a situation, participants will generally be called upon to:

- Collect topics
- Select key topics
- Elaborate on key topics
- Plan measures for future action

In a training, or other event where content delivery is the key objective, the moderator or the trainer will have done all of the above ahead of time. Still, the moderator or trainer will have to:

- Define the importance of the selected topics
- Describe key topics
- Elaborate on key topics
- Allow participants to apply their new knowledge and skills, usually through planning measures for future action

c) *Ending and Evaluation*

The end, like the beginning of each event, is generally similar. With support from the moderator, participants will usually reflect on the event, discuss possible questions, and provide their evaluation. Afterwards, the moderator closes the meeting.

Finally, the event needs to be evaluated and documented. The first evaluation, as mentioned above, takes place with feedback from the participants at the end of the meeting. Further evaluation can take place after the event, as the moderator and/or support team examine:

- The preparation of the event
- The skills of the moderator within the event
- The relevance of the contents, and the measures for future action
- The materials, methods, and media that were used
- The development of the group process
- The learning atmosphere, environment, conference venue
- The results of the event

d) *Documentation*

Finally, the event should be documented. Documentation contains all important information that arises before, during, and after the event. This can include the materials used, along with contact information from participants and the moderation team.

The purpose of the documentation will influence its style and content. In many cases, it will simply report factually on the process of the event, and its results. However, it can also describe emotional and personal aspects, such as the moods, thoughts, and feelings of the participants.

The audience of the documentation will also play a key role. Is it intended as a promotional tool for the organisation hosting the event? Will it be a manual from which other people can replicate similar results? Some documentations will be a simple print out, while others will be designed as books for print. Budgetary considerations regarding the documentation should be defined early in the process.

Printing is one possibility, but electronic dissemination is becoming more common, as organisations can send copies of the documentation to participants over email, or distribute them over their web-sites.

Procedures for Moderation

It is difficult to create a step-by-step guide towards moderating an event, as each event will have a different context, participants, and intended goals. The following can be considered a list of questions which may be useful in planning, and in carrying out an event. It should not, however, be considered a complete or exhaustive list of all the possibilities. Remember, the more information you have, and the more precise the information, the better the chance that things will turn out well. Think of it as a starting point for future practice:

Participants

- What previous knowledge do the participants have?
- What do I know about their interests?
- Do the participants already know each other from another context? Do they already work together? What are the existing hierarchies among the participants?
- Is there any information on conflict about the participants?
- What do the participants know about the event? What information should you give them?
- What expectations do the participants have about the events?
- Is there information about the need for this event?
- Are there any previous analyses of the events?
- Do the participants know the moderators?

Most groups of 150 people will probably fragment into subgroups, and by the end of any period, it can probably be expected that some members will not have spoken to other members at all. The number, however, is particularly important for moderators, especially if they are expected to develop personal relationships with group participants, and interact with everyone on a personal level.

Dunbar's research also suggests that there limits to conversational groups, which tend to evolve into clusters of around four people. There are some psycho-physical limits to this, related to the distance at which people can have a comfortable conversation. With regards to moderation, it seems that working groups of around four people are effective, and determined as much by evolutionary biology as they are by common sense.

The anecdotal evidence from online networks tends to support the existence of the Dunbar number. Research on online communities has shown that they cap off around 150 people, though it should be noted that many online games (intentionally or not) encourage players to create multiple characters. Also, many players or members are not necessarily active (lurkers). Further speculation on the Dunbar number and online communities can be found in this article on "The Dunbar Number as a Limit to Group Sizes" (http://www.lifewithalacrity.com/2004/03/the_dunbar_num.html).

With regards to smaller groups, there is some evidence (see "The Nature of Human Altruism", by Ernst Fehr & Urs Fischbacher) to suggest that cooperation falls off sharply with groups of more than 8 people. While the experiment was based on a Prisoner's Dilemma-style game *, game theory suggests that such behavior is also true of human behavior on a more general scale.

According to Fehr and Fischbacher's data, this lack of cooperation associated with large groups is especially true for groups where if, like many moderated events, there is no capacity to punish lack of cooperation, or at least, not in an immediate fashion that is connected closely to the breach of cooperation. In such a case, the drop off at 8 people is quite dramatic, and at 16 people or more, cooperation falls to nearly zero.

Now, actual human interactions are significantly more complex than a Prisoner's Dilemma game, which essentially allows for two options. In effect, the rules of social behavior and the importance of personal reputation act as constraints on individuals which encourage cooperation and altruism. Still, the fact is, in most moderated situations, it becomes increasingly difficult to get a group of more than 8 people focused and listening, and actively working on the task at hand. The solution, of course, is to allow opportunities for participants to work in more manageable groups, like in groups of 4 or 5 that we mentioned earlier.

In some ways, it is easier to moderate an online community, as moderator(s) can impose limited sanctions on people for poor behavior. These range from temporary suspensions, to permanent bans. Also, voluntary communities can also be easier to manage than professional relationships, as again, it is easier to impose sanctions and consequences on people.

It should be noted that cooperation remains quite high is non-cooperators are punished, and all participants pay some of the costs. Under such a system, all participants have a vested interest in ensuring cooperation by others. This is essentially how crime is controlled in society: police are paid for by everyone through taxes, and they punish criminals.

* The classical prisoner's dilemma (PD) is as follows: Two suspects A, B are arrested by the police. The police have insufficient evidence for a conviction, and having separated both prisoners, visit each of them and offer the same deal: if one turns Kings Evidence against the other and the other remains silent, the silent accomplice receives the full 10-year sentence and the betrayer goes free. If both stay silent, the police can only give both prisoners 6 months for a minor charge. If both betray each other, they receive a 2-year sentence each. If both prisoners are trying to selfishly minimize their sentence, the most logical thing to do is to betray the other. At best, the prisoner goes free. At worst, he serves two years. Even if both prisoners can meet and conspire, they cannot be completely sure they can trust the other. In his book "The Evolution of Cooperation" (1984), Robert Axelrod explored an extension to the classical PD scenario, which he called the iterated prisoner's dilemma (IPD). In this, participants have to choose their mutual strategy again and again, and have memory of their previous encounters.

■ Summary

The Dunbar number states that individuals can maintain an average of 150 stable relationships through personal contact. This number should be taken into consideration when designing events and building organisations. In addition, evidence also suggests that people tend to hold conversations in groups of 3–5 people, and that they cooperate best in groups of less than 8 people, especially where the consequences for poor cooperation are not immediate. This means that moderators should work towards ensuring that people are given the opportunity to work in smaller groups, in order to allow for most effective inputs from all participants.

Rules for Moderation

■ Introduction

This chapter tries to present basic information about the rules and procedures of moderation. In general, all moderation activities are based on similar rules, and form a similar structure. This is true of both traditional moderation activities, and of the innovative and interactive methods described in the latter half of this book.

Part of a successful moderation is encouraging a pleasant and productive group environment. Hence, it is important to create and maintain such an environment during a moderated activity

■ Rules for Cooperation Within the Group

Strong teamwork and a good working environment can be considered pre-requisites for any effective group activity. These rules can be considered guidelines towards achieving those aims. Some basic ground rules for working include:

- Every participant is responsible for himself, and should represent themselves through “I” statements
- Disturbances (either from outside, i.e. loud noises, or inside, i.e. misunderstandings among participants) will be cleared before they can have a negative effect on the working process

- Side conversations can be useful, and should be used to add to the group process

Some additional guidelines are useful for governing behaviour and interaction within the group:

- Other opinions should be tolerated
- Fairness in language, including choice of words
- No “killer phrases” that end discussion
- Statements should be brief (at most two to five minutes)

■ Rules for Cooperation Among Moderators

It is an advantage for moderators to work in pairs, or even a team, as one person can only do so much. Additional moderators are particularly needed in large groups (upwards of 30 people). Extra individuals can observe the group better, and the moderators can also take turns so they don’t suffer from fatigue. However, it is important that the moderators give participants the impression that they are a strong and effective team. Some guidelines for teamwork are as follows:

- The tasks should be clearly outlined
- The moderators should be equal
- Everyone should know their tasks
- In case something is unclear, moderators should coordinate verbally or non-verbally (i.e. don’t assume that everything will be fine)
- Everybody helps everybody
- The tasks alternate, and moderators alternate as the focus of attention (this preserves the image that the moderators are equal)
- The active moderator usually stands in front of the group to signal that attention needs to be focused on him
- During the group discussions, the moderator can sit down to show that attention should be focused on the other participants
- The other moderator who does not communicate with the group stays in the background, performing other tasks (i.e. note-taking, visualisation)
- Both moderators work together to open and close the moderation in its entirety

Even in situations where there is only one moderator, he or she should observe as many of these guidelines as possible. It is particularly important that the moderator knows the task, and be able to mobilise help from participants in difficult or complicated circumstances.

■ Rules for Procedures

In the process of the actual moderation, it is particularly helpful for the moderator to observe the following guidelines:

- Participants should have an opportunity to get to know each other
- Every participant has the right to ask for meta-communication, i.e. open a discussion on the communication processes within the group
- Statements from participants should be visualised as clearly as possible
- If a participant's statement is to be changed, his agreement is necessary

- Decisions are to be made together as a group, though participants should never be forced to come to an agreement
- The group interprets statements from participants
- Moderators usually lead the group by asking questions, rather than making statements
- The end of each meeting should be marked or celebrated in a special way

Other rules and guidelines can be created and applied as the situation demands, or with cooperation and input from the group. The aim should be to create a sense of common ownership over group and organisational processes, which can lead to greater responsibility for the contents of the meeting.

1.3. Building a Space for Moderation

Introduction

Every moderated event takes place within the context of a specific space and a specific time. In this sense, space encompasses a variety of important features, including lighting, work spaces, display spaces, eating spaces, break spaces, and so on. The space, however, can provide an effective contribution to the learning process. Good spaces encourage work, while poorly designed spaces force people to work around them. These issues are also important outside of the context of a regular moderated activity, and should be addressed in classrooms, work environments, and so on.

In general, the space can serve a number of key functions, including:

- Protection** – a space for a moderated event should be a safe space, which permits participants to move or speak freely.
- Order** – a well designed space will give the impression of a formal order: materials are here, seating is here, the common space is here, and the break space is here.
- Communication and integration** – good spaces will help activate the group, and promote cooperation. This includes reducing the barriers that keep people apart and preventing conversation.
- Representation** – effective spaces will allow participants and the group in general to see and hear as much of the working processes and results as possible

The Space

■ Holistic Environment

Consider the entire space that the moderation takes place in. It doesn't just happen in a room. It occurs in a building, which exists in a neighbourhood, which exists in a city. A meeting in a resort will have a different character from a meeting in a big city. A meeting at a local community centre will be different from one at a university.

Participants will not be spending their entire weekend or week at the event. Think about what else they can do, and how it might contribute to their experience. Are there opportunities for group activities? Are participants expected to go out and entertain themselves? Are they expected to stay in? Are local examples of good practices related to the topic participants should see?

Hotels are most frequently used for external training, as they provide both accommodation, and rooms for the event. Good hotels will also provide media equipment, and Internet, alongside relaxation activities. However, it is almost impossible to feel at home in a hotel. In most cases, this is not a problem, as people don't necessarily want to feel at home to work.

Keep in mind that group activities and informal conversations will make a significant impact on team building, and on group results. Ensure that there are opportunities for enjoyable group activities outside of the event, along with time for participants to pursue their own interests. It is the moderator's task to search for the advantages of the environment, and to capitalise on them.

■ The Main Room

In most situations, the moderator will have a large room at their disposal, where most of the activities will take place. The moderator should think about the best ways of using the room, and everything in it. This includes tables, chairs, lighting, and even the walls and the floors. All of these things can be used to make the event more effective:

Tables tend not to be used much by moderators.

The present thinking is that tables act as a barrier between people. Hence, they tend to be used for writing or working at, or for people to keep their things on, and not much else. Tables can be used at the beginning, if people need to review documents or fill out paperwork, or for small group work. In small groups (i.e. four to six people) tables can serve as a more intimate setting. The World Café, presented later in this book, offers a

more novel way to make use of tables. At present, most moderated activities tend to revolve around a circle of chairs. This has the benefit of symbolising the community and equality of the participants. It places people in closer proximity to their neighbours than a conference table. However, make sure that people have appropriate equipment for writing, taking their notes, and doing their work.

Chairs aren't only used for sitting. They can be used for games and other exercises.

The floor can also be used for concentration and relaxation exercises. Participants can also use the floor to present materials, or create common pictures and sculptures. It also provides a vast free space that can be used for exercises and presentations.

Walls are particularly effective for displaying and presenting the work of participants. They provide an ideal, space-saving place that most participants will be familiar with from their days at school. However, make sure to test out whatever you use to stick things up first, to ensure it won't damage the wall.

Light can have a strong impact on the working atmosphere. Natural light is optimal. That being said, light that is broken up by blinds or curtains tends to be more comfortable than bright light entering through a large window. Badly lit rooms will require more breaks than a well-lit room. Too much sun, however, has a tendency to make individuals relaxed and drowsy.

■ Other Spaces

As mentioned above, the moderator should take the space outside of the main room into account as well. Many moderated events will also require additional working spaces. These can be prepared in the same way as the main room.

The moderation, however, can also make use of other rooms and areas. Lobbies can be used for welcoming participants, along with some certain activities during the working process, as well as for any formal farewells in the end.

Break rooms are helpful for relaxation, but they can also be used for smaller groups working on special tasks. This may be important if the break space allows smoking, and a significant proportion of the participants are smokers. Some of them may work more effectively if they are allowed to smoke.

Restaurants, cafes, or other dining areas can also be very effective for small group activities. They provide more of a community atmosphere, and allow small groups to sit and discuss in comfort.

Finally, outdoor areas can be particularly useful for certain activities. The surrounding nature can be used to provoke new ideas, or for interactive activities which require greater freedom of movement. Sports and other competitive outdoor activities can also serve as team-building exercises. In general, outdoor events provide greater opportunities for moderators and trainers to appeal to all the senses.

1.4. Tools for Moderation

Materials

■ Introduction

Most moderators will have a number of tools that can be used for a variety of purposes. This chapter provides a brief list of some of the more essential tools, along with suggestions on their use.

■ Pin Boards and Flipcharts

These are probably the most common material aids for moderated events. Both the moderator and participants can use them to help visualise ideas. They can also be moved around the room for different purposes, or to free space.

However, flipcharts have limited room. Pin boards can offer more space, as chart paper can be moved to the pin board. Note cards and similar items can also be pinned up, moved around, and clustered.

If pin boards are not available, it is possible to cover a wall with a large sheet of paper, and use sticky tac or tape to hold items up.

■ The Moderation Suitcase, Moderation Cards, and Material Box

Moderation suitcases are filled with basic materials for the job, which include moderation cards of different sizes and shapes, pins, markers and pens of different sizes and colours, scissors, glue sticks, masking tape, paper, Sticky-Tac, etc. For ease of use, it is best to sort the suitcase, and to ensure it contains all needed materials.

Moderation cards can be considered basic tools as well. The different shapes and colours can be used to symbolise different things, as determined by the moderator. It can be used for collecting ideas, clustering, graphics, and symbols.

Additional materials can be stored in a box. This would contain materials for warm-ups, get-to-know exercises, and group activities. These materials are generally tailored to suit the needs of individual moderators, and hence, it is impossible to compile an exhaustive list.

In our experience, useful items have included:

- Soft foam balls (useful for name games and throwing games)
- Candles (useful for establishing ambience)
- Small rug or cloth (useful for creating a space on the floor)
- A bell with a long tone (useful for establishing silence, or time for reflection)
- Vases and flowers (useful for establishing ambience)
- Talking stick

■ Electronic and Multimedia Tools

Electronic media is becoming a more and more important part of moderations. These range from overhead projectors, to notebook PCs and LCD projectors, to digital cameras, to CD players, to video sets.

Overhead projectors are useful for short presentations, including text, drawings, or graphics. In contrast, PCs and LCD projectors are useful for extensive presentations. Note, however, that visual presentations using Microsoft Powerpoint or similar software should serve to support the speech and the content of the presenter.

Music can be used to establish a mood, or to support group activities. Short videos can be used to present information about specific topics. However, with the present convergence of multimedia technology, a PC and LCD projector can perform most of the functions of standalone music and video players.

Finally, digital cameras are becoming a more important part of the moderator's toolkit. Digital photographs can be used to help document visualised products, and to create a graphic record of events for documentation. The pictures can also be easily sent to the participants over email, or on CD. Most digital cameras can also record short video sequences, which can be included with documentation on CD.

■ Using materials

Using moderation materials depends heavily on the rules of moderation, the basic rules of visualisation, and the group dynamics. Some general recommendations are as follows:

- Applied techniques and materials should follow the needs of the group, and the interests and abilities of participants
- If there is resistance against specific methods, look for alternatives
- Do not use too many materials. It is not necessary to show everything that the moderation suitcase contains
- Use only techniques and materials which fit the current task and situation
- Products which use the materials should remain visible for the participants
- Do not use too many electronic tools and aids
- Materials should support the moderation, not be the entirety of the content

Visualisation

■ Introduction

Moderation tries to address as many senses as possible. Most participants will learn more effectively as their different senses are engaged, and will have a better chance of recalling what they have learned. Also, speech by itself can be unclear, and provoke misunderstandings. Visualisation offers an opportunity to make a record of what is said, and can be used to clarify statements so they are understood the way the speaker intended.

In addition, body language plays an important role in all human interactions. Hence, moderators should have a good understanding of body language so that they can better observe the patterns of interaction within the group. Furthermore, body language is essential to keeping audience interest, and in delivering strong and effective presentations.

Visualisation goes beyond text and writing, into the realm of semiotics. It will be helpful for moderators to develop a repertoire of visual symbols in order to convey information briefly, and more effectively. Don't neglect the effectiveness of maps, charts, graphs, and other visual forms of communication.

This chapter will show the importance of visualisation for moderation, and provide some practical hints for its application. It will also draw attention to the importance of body language for successful presentation.

Defining Visualisation

In the context of this book, visualisation works to supplement or translate the content of a presentation, which is usually expressed in spoken language, into graphical signs. These can be letters, pictures, graphics, symbols, diagrams, lists etc. The idea is to transform the spoken word into a visually apprehensible format.

■ General Functions of Visualisation

Visualisation will support communication in a variety of ways, as follows:

Motivation – visualisations produce attention and curiosity

Mnemonic – visualisations link speech and visual cues structure: visualisations are seen as a whole, and can illustrate links and connections

Clarification – visualisations offer an aid, if the linguistic communication is not sufficient for the understanding of issues.

Communication – visualisations help structure discussions

Problem Solving – visualisations can illustrate issues

■ Functions of Visualisation in Moderated Events

In moderated events, visualisations can perform more specific functions:

- Caricatures, drawings or sculptures can help motivate participants
- Symbols, combined with text can assist memory
- Tables, charts, and organisational plans can help participants visualise structure
- Technical drawings and construction plans can help clarify technical issues
- Illustrations of motions and rules can assist with orientation and physical actions
- Clustering ideas, drawing lists, and creating links between thoughts under discussion can illustrate the significance of certain issues, and can help promote agreement
- Visual guides and organisational charts can help solve problems

■ Visualisation and the Group

If used appropriately, visualisation can enrich and support group processes in various ways. The moderator should decide whether visualisations are appropriate for the situation. Relying too much on one particular method (for example, clustering ideas) can quickly become boring, and hence affect the creativity of the group. Hence, it is important that the moderator can use a variety of different visualisation techniques.

For the use of visualisation techniques the moderator should consider the composition and the interests of the group. Managers, teachers, engineers, and consultants will all have different experiences and different preferences regarding visualisation. Still, experience has shown that everyone, regardless of age and job, will find visibly illustrating their thoughts and creativity to be useful. The differences tend to relate to the types of symbols that are chosen, and the use of colours.

Interactive Visualisation

Visualisation is not inherently dynamic. However, it can be a dynamic process if it is used to document interactive processes in the group. Mind maps can

be seen as one example of a dynamic visualisation method.

With a mind map, one starts from a core idea. From there, the group's ideas get added in on a series of branches. Further ideas get added on to the branches as they are brought up. They have the advantage of showing the order and pattern in which ideas have been expressed.

Different stages of a moderated event can be symbolised by different parts of a journey (for example, a trip to the moon). The participants can work together to build this picture. The use of metaphors offers the possibility of additional free associations, which can act as creative starting points for the realisation of the fantasy.

■ Visualisation in Practice

Materials and Composition

Most of the visualisation activities will take place on flip charts, with the possibility of moving large sheets to pin boards, or even the wall. Regardless of the actual materials, the moderator should ensure that the displays are easily visible, and follow a logical arrangement. The following can be seen as some guidelines for creating visualisations:

Print letters, rather than writing: Printing tends to be more legible from a distance than handwriting. Also, make sure you have a sense of how big letters need to be in order to be seen at different distances.

Use both upper and lower case letters: Using upper and lower case letters also tend to be more legible. It can help provide important cues, like where sentences or points begin and end.

Digested information (7x4): Put up only the essentials, and in digested form. It is important not to pack each sheet of paper with too much information. Different people have different rules, but generally, a title, and seven lines of four words is more than enough.

Let pictures do the talking: Try and use symbols, rather than words. On the other hand, make sure people know what your symbols mean. Not all symbols are universal.

Three colours: One colour for the title, another for the basic text, and one more for highlighted words. There is no need to make each poster as colourful as possible.

With regards to specific content, moderators can be expected to:

- Enumerate lists
- Represent developments and processes in curves or flowcharts
- Present absolute figures in lists, bar charts or histograms
- Symbolise organizational structures in an organization chart or a net diagram.

It can be helpful to leave posters and displays up for the duration of the moderated event. In this way, participants can cue themselves with the subjects of past discussions, and also refer back to the information.

Planning Visualisations

In most cases, a moderator can expect to create visualisations. Hence, the moderator should plan in advance, though flexibility is will almost certainly be needed in practice. Some guiding questions to help the planning process include:

- What do I want to illustrate (contents)?
- What does the illustration serve (a goal)?
- Who do I want to inform (group of participants)?

These guiding questions determine which instruments are appropriate (pin board, flipchart, overhead projector, PC/beamer). The moderator should also anticipate which kinds of design elements (texts, graphics, symbols, and diagrams) can be possibly used.

Listening, Observing, and Asking

■ Introduction

The moderator's task is to help the group use its own competences in order to achieve optimal results. Part of this requires the moderator to promote better communication within the group. In order to achieve this, the moderator needs to be able to actively listen to the participants, and understand the messages behind the words. Furthermore, when participants are uncertain or ambiguous, it can also be helpful for the moderator to interpret the body language.

However, observation is not always enough. A moderator needs to be able to ask effective questions. A good question can cut through uncertainty, and help a participant clarify his own position. Effective questions can also serve to prompt people, and help them pursue their ideas in new directions.

■ Listening

The moderator's responsibility is to minimise misunderstanding among participants. This means that the moderator has to understand what participants say as clearly and precisely as possible.

For the moderator, active listening has two key functions. Firstly, the moderator has a professional responsibility for promoting effective group communication. Secondly, the moderator should express that the group and the participants are important to him. In general, the moderator needs to:

- Express his interest in the group, on a personal level
- Reveal his understanding of the group discussion, without evaluating what is being said
- Express appreciation of the group's efforts

With regards to using active listening to accomplish the above three points, the moderator needs to:

- Place his full attention on the speaker
- Understand the internal connections that are taking place
- Assess his perceptions regarding what is being said critically

■ Questions

If there are problems in communication, questions offer an opportunity for clarification and resolution. In general, most communication issues fall into two categories: factual and emotional.

Issues with factual content can be resolved through paraphrasing. Essentially, the moderator can restate the facts under contention, and see if the participant agrees.

On occasion, however, the issue isn't the facts, but rather, emotions. In such a situation, the moderator can reflect back what seems to be the emotional content of what is being said.

Paraphrasing

The paraphrasing can give the original speaker the impression that the listener is trying to understand, and communicate back the way the message has been received. Typically, a paraphrase begins with, "If I understood you correctly, then ..." A paraphrase as a question can serve as an appreciation.

The nonverbal reaction of the group (agreement, indifference, disagreement) can provide a feedback on whether the paraphrase adequately reflects the impression of the group, and whether the question helps everyone else.

Reflecting

Reflecting tries to address the interpersonal level in communication, as it brings out the emotional state of the original speaker. Normally the moderator will do this if he feels that:

- it is important to indicate a personal interest to the group or individual participants
- it is important to discover something about the intentions of the group or of the individual members
- it is important to clarify the arising annoyance about misunderstandings.

Through this process, the moderator can check on how people feel about something that just happened within the group, and get feedback on whether his assessment of the situation is correct. It is best to reflect back what participants feel in the form of a question, as people occasionally get offended if you make statements about what they are feeling.

A typical question might start off, "Does this situation make you feel ...?"

How you ask questions is very important, but people do have different styles of communication. Hence, it is impossible to give clear guidelines on the best way to ask questions. Still, the following hints might be useful:

- ask positive questions
- formulate your questions briefly and precisely
- give questions from the group back to the group (except questions relating to organisation or the agenda)
- always address questions to the group
- address the one, who first shows that he wants to say something
- do not address anybody, who does not want to speak
- reformulate questions if answers are missing
- ask "open" questions
- ask "w"-questions (who, what, when, why, and how?)
- ask by gestures, increase your mimics
- "neutralize" aggressive questions through reflection
- ask questions to provoke the group if needed

■ Body Language

Champion Poker players can tell you: body language can confirm, strengthen, neutralise, or even throw spoken words into doubt. The body can show the speaker's position or attitude, how he feels in a certain situations, and what he thinks about his dialog partner.

All of those cues mostly take place unconsciously, and are acquired to a large extent culturally. Hence, it can be difficult to consciously control your body

language, and that is probably unnecessary within the context of moderated events (that is, unless you're moderating the World Cup of Poker).

Still, being able to interpret body language is very important for moderation, as it helps the moderator assess others correctly, and become more aware of his own effect on others. Body language can for example:

- clarify how something was really meant (for example, the tone: ironic, serious, funny)
- show that a positive message was perceived negatively (knitting one's eyebrows, looking away)
- radiate that the speaker feels confident (in the role of the speaker: standing or moving in a calm way)
- emphasize engagement concerning a certain issue by the position of the head (an upright head) or showing receptiveness (head bent to one side)
- demonstrate self-confidence or doubt (bowing the shoulders or giving a shrug)
- express proximity or a lack of interest (by leaning the body forward or backward)
- reveal faith, uncertainty, strength, resistance by different hand-positions (open, covered, closed hand, turning the palms to the outside)
- express calm (put forth the legs), the willingness for action (bent legs), helplessness (to crouch) by the way of sitting
- show pleasure, interest, anger, annoyance by numerous variations of the mimic
- show interest, appreciation, attention through eye-contact and uncertainty, hostility, ignorance through the loss of eye-contact

Body language can change with a person's attitude. A positive attitude usually produces a body language, which gives positive signals. So the own acceptance of the situation (having fun, joy in cooperation with the group) usually leads to a body language, which is regarded and recognized as harmonious.

Methods

■ Introduction

Creating a training is a complex logistical process, that requires research and development, alongside careful preparation. That being said, it is entirely possible to entirely improvise a training.

Most moderated events will be constructed from a menu of different methods and approaches. Those listed here are only a small selection of possibilities, culled from a vast selection that we have used in the past.

In practice, most moderators develop a repertoire of methods which they consider to be successful because of positive feedback from the audience. Still, it is important to be flexible, as successful methods from the past may not be optimal for a particular group. Despite careful planning, it may be that the methods need to be changed. Hence, the more methods one knows the better.

Also, as a moderator, you should never be afraid to try out a new method. If it doesn't work, it can always be changed and adapted.

■ Methods in the Group Process

Every group normally passes through four key stages:

1. In the first stage, "**Forming**", the group members get to know each other.
2. The next stage, "**Storming**", usually occurs as the result of a crisis, as participants must come to terms with different visions of the group and its objective.
3. Next, in the "**Norming**" stage, the group members reach agreements, and establish working methods. "Norming" proceeds to "performing", where the group functions as it should.
4. The final stage, called "**Re-forming**", the group makes out its.

While this classification is generally valid, the real life does not generally flow so smoothly. Groups can move back to previous stages if there is a disturbance or conflict, or progress to certain stages very quickly.

■ FORMING: Getting to Know Each Other

Every time a new group meets, there tends to be a lot of uncertainty. The moderators and the participants are constantly asking themselves:

- what do I expect from this event?
- am I going to feel comfortable with the group?
- am I able to cope with the presented topic?
- can I realize my interests during this event?

Most people start off by evaluating the rest of the group, and the moderator, while at the same time, everyone is trying to leave a good first impression. If this stage is successful, individual participants should become a functioning group. An example activity for this stage is:



Example Activity: Rotation Circle

The rotation circle is a method for paired discussions among participants, leading them deeper into the different aspects of the themes of the seminar, while allowing them to learn more about each other.

Preparation: The moderator should prepare a list of questions. The questions on the sheet should be appropriate to the topic, or can be Appreciative Inquiry questions. Examples on the topic of intercultural learning can include:

- What were your most positive first impressions or excitements when you first began to work in the field of intercultural learning?
- Tell me about a peak experience or high point in your work on intercultural learning?
- Without being humble, what do you value most about yourself, and your organisation?
- If you could have three wishes granted to make your work the most rewarding and most fun possible, what would they be?

Materials: Copies of the question sheet for half the group.

Procedure:

- The moderator should begin by explaining the process to the participants, and then asking everyone to form pairs, and to line up in a circle, with each person facing their partner.
- Each person in the inner circle receives a sheet with questions. They may choose one question from the sheet to ask their partner, who has a minute to answer the question.
- At the end of the minute, the moderator should ring a bell. Everyone should stop talking, and the people in the inner circle should step to the left, and pass the sheet to their new partner, who can pick a new question.
- After another minute, the moderator should ring the bell again, and everyone should stop talking. The people with the sheet should take another step to the left, and pass the sheet to their new partner. This process can continue for as long as the moderator chooses.
- After the activity, participants can come back together and evaluate the process.

■ STORMING: Clarifying the Goals

In the storming stage, the group continues to develop. The individual members confront each other, and familiarise with themselves with the styles and habits of their team mates. The individual goals and agendas, however, are still kept private, and there are no common objectives as of yet. The different goals often come into conflict, and people have not yet found their place within the group.

The group itself is still unstable, and not fully productive. As with the forming stage, people will continue to observe others and wait for them to do something.

At the end of the storming stage, group members will generally have found a common purpose, as well as different ways of dealing with each other. Each person will know where they stand within the group, and have an impression of the group and its task.

Some methods which can be effective for dealing with this stage include:



Example Activity:
Brainstorming

A brainstorming is an easy technique to quickly collect ideas regarding one topic. The goal is to produce a list with ideas, which can be discussed afterwards. After a brainstorming the group members can remove inappropriate and less important ideas from the list. During the collection of ideas there should be no evaluation. Everything should be written down without comment.

Preparation: Choose a topic for the method.

Materials: Useful materials include flip charts and large sheets of paper. Note cards can also be used

Procedure:

- The moderator begins by explaining the topic, and the aims of the cooperative activity, which is generally to create a list of ideas around the topic, and to identify key priorities.
- The entire group sits around or in front a large sheet of paper, and chooses one person to be the writer. Next, each person expresses their ideas regarding the chosen topic.
- Everybody can speak several times. The moderator can encourage people to speak, and to make sure that everyone sticks to the rules.
- Everyone should suspend their judgements on the ideas until a list has been compiled. They can be further structured through clustering or mind mapping. In order to ease and simplify future clustering or mind mapping, it may be more suitable for group members to write their ideas on cards and submit them.



Example Activity:
The Bridge Building

This is a pure team-building activity, designed to give participants an opportunity to work together towards a common goal.

Preparation: Ensure you have sufficient materials for all of the groups. Build a bridge yourself to ensure that it can actually be done with the materials you have. Also, make sure that the activity will be perceived as being enjoyable, and age-appropriate.

Material: All kinds of materials can be used in this exercise. Popsicle sticks, straws, bamboo skewers, coloured paper, cardboard, paper towel rolls, tape, glue, plastic bags have all been used in the past.

Procedure:

- The moderator should explain the goal of the activity, which is to build a bridge to connect two chairs (or tables, or chairs). The bridge has to be stable and freestanding.
- Separate everyone into groups of 4–6.
- Explain that each group has 40 minutes to complete the task.
- Make sure that each group has a slightly different mix of tools, and that each group has something unique. Also, create a package of common materials. Everyone should work together to decide how to distribute the common equipment.
- During the working process, the moderator should work to reduce conflicts, and to encourage everyone to work together and share their materials. However, as in all other situations, the moderator should not try to directly tell anyone what to do or how to do things.
- At the end of the time period, each group presents the bridges they have built.
- The moderator should acknowledge the contribution and cooperation of all of the teams.

■ NORMING: Reaching Agreements

When the group structures are stabilized the participants can begin the process of identifying important tasks, and working together to achieve their common aims. At this point, there is a certain energy in the group, especially if everyone has worked together to overcome a crisis in the storming phase. However, the group will still be somewhat unsure of its ability. Too much doubt, and the group could go right back to the storming stage.

Further successful activities together will reinforce previous successes, and strengthen the group. However, the moderator will need to balance activities that are too easy, and hence might be seen as patronising, and activities that are too difficult, that might discourage participants.

As the uncertainty disappears, the group will function as an effective team, and hence, be ready for the next stage: performing.

Some methods which are effective for Norming include:



Example Activity: Clustering

Clustering is designed to clarify the relationships between ideas, as well as to show the main categories and topics under discussion. It can also be used to show the connections between the results of different teams.

Preparation: This method requires a substantial amount of space, where the results can be placed up and sorted. Ideas can be generated using Brainstorming (described above).

Materials: Note cards, a pin board or wall, markers, tape or Sticky-Tac.

Procedure:

- The moderator introduces the participants to the method and the theme. Through Brainstorming, participants generate ideas, which they write on the note cards.
- After a number of cards have been generated, the moderator or a group member selects a card, reads the idea, and attaches it to the wall or pin board. The same person chooses another card, reads it out, and asks whether it should start a new topic, or fall under the same column as the first card. The group should make the decision.
- The group can collaboratively invent titles or categories for each column. The clustering goes on until all the cards are pinned on the board. The largest columns generally signify the most important or pressing issues for participants.
- This process will generally start off slowly, as participants debate how to organise their ideas. However, after a while, it will move more quickly as the group develops a clearer idea of how each category is defined.



Example Activity: Mind Map

Mind maps try to collect ideas in an organised way. It can be described as a map which tries to illustrate the relations between the ideas expressed in a group.

Preparation: Familiarise yourself with the method, and generate a core topic for discussion. It may be helpful to create a mind map for yourself before the moderated event.

Materials: A big sheet of paper, on which the map can be drawn. Coloured pens and crayons will also be useful.

Procedure:

- The members of a small group (4 to 8 people) sit around a big paper (larger groups can be divided down further).
- One person is the designated writer, who will write down all of the ideas in the right places on the mind map.
- The moderator (or the group) can discuss the topic and goal of the exercise. The moderator can also act as the designated writer, or help generate discussion within each of the groups.

- The topic is written down in the middle of the paper. Next, the writer asks the group for the most important aspects of the topic, which are then written around the topic like limbs. From these limbs, additional related ideas can be placed.
- The entire group decides where each idea should go.
- At the end of this process, each group (if the larger group has been broken up) can share their results. The Mind Mapping can lead directly into creating plans for future action.

■ PERFORMING: Cooperating

Performing represents the most productive period in the group cycle. The rules and roles are well-established, and participants have a clear idea of what they want to accomplish, and how they plan to go about doing it. The group may even have a few successes by this point. The atmosphere is still relaxed, however, with tolerance towards individual participants.

At this point, the participants should work on activities directly related to the topic. They can work together and develop plans for action. If additional structure is needed, the interactive methods described in Part 2 of this book are all appropriate.

■ RE-FORMING: Creating a New Balance

The final stage of the process will involve a formal closing of the event, and a farewell. The goal here is to protect the results, and document the conclusions. Ideally, participants will go on to develop the results outside of the context of the group.

In many cases, participants will feel very strongly about the relationships they have developed over the course of the moderated event. Hence, it is particularly important that the moderator works to bring about the local conclusion of the event in a visible fashion.



Example Activity: The Wall Newspaper

The goal of this exercise is to visually communicate the results of the moderated event.

Preparation: The moderator should ensure that sufficient materials are available for the group. Please note that it is generally not a good idea to show an example of finished work, as it may unduly influence the results that the participants produce.

Materials: A large sheet of paper (newsprint, chart paper, or butcher paper are all suitable). Crayons, markers, paints, scissors, glue, and pictures from magazines and newspapers can all be used to create the image.

Procedure:

- The moderator should explain that the goal of the exercise is to pictorially represent what they have done so far.
- The group should be divided into small groups (3–4 participants are ideal), and given 1 to 2 hours to complete their pictures.
- Each group should have free reign in creating and designing the pictures. The moderator should ensure that the group sticks to the topic, and to the task. Some people may feel discouraged by a perceived lack of artistic ability, but they should be able to work with collage elements.
- The pictures are presented to the plenum. Alternatively, they can be placed up on the wall, and all of the participants can take a “gallery walk” around the room.

1.5. Virtual Moderation

At present, moderation in the context of email, message boards, and online worlds cannot be ignored. Many important discussions take place online, and we are seeing continued growth in online courses. Many of the principles behind moderation still hold true, though the methods are limited by what can be exchanged in text discussions. Many of the most basic rules, for example, having a clear idea of the task, and of establishing ground rules for discussion, still apply closely to Internet discussions.

Most Internet discussions for work-related purposes will take place within the context of private mailing lists or message boards. However, large, public, and anonymous discussions may be useful for certain objectives, such as fostering widespread discussion on an issue, or raising awareness about events. The goals and purposes of the discussion, as with all moderations, will affect the methods and techniques that are used.

Internet discussions are both easier and harder to visualise. In most cases, message boards and mailing lists keep a constant record of what is being said. However, most online sites have a high signal to noise ratio (i.e. a lot of important information is produced for everything that is important). The present text-based nature of the medium also makes it difficult to rapidly create charts and other visual cues. The role of the moderator, then, becomes to separate the signal from the noise, and to summarise the results of the discussion in order to keep prompting communication.

The moderator also has a responsibility to prevent outside disturbances from breaking up the discussion. Some of these are the product of the anonymous nature of the Internet. Many message boards and mailing lists are targeted by spammers (people who send mass emails for the purposes of advertising). The moderator (or list administrator) needs to protect the privacy of participants. This is, of course, tied into the concept of creating a protected space in the earlier discussion of building a space for moderation.

The bigger and more anonymous the discussion, the more problems are likely to occur. Large, anonymous forums often have their share of “trolls” (people who try to create disruptive and unproductive discussions). On the other hand, moderators do have the power to temporarily or permanently suspend accounts. While it would be generally unthinkable to kick someone out of a face to face event (and indeed, it would generally be unthinkable for someone to behave in a fashion that gets them kicked out), the low opportunity cost of participating in an Internet discussion means that suspension is a reasonable penalty for not abiding by the rules.

1.6. Encouraging Creativity

From Future Workshops to the World Café, most of the interactive methodologies discussed in this book so far rely heavily on creativity and the imagination. Yet, quite often, participants feel blocked, or tired, or unable to produce creatively on demand. This chapter will present a short list of strategies that can be used to help participants think through the implications of their ideas, and develop them more fully.

The real answer, however, is probably much simpler than most people imagine. The writer Neil Gaiman was once asked where he got his ideas. His answer can be briefly reduced to two things: **(1) everywhere, you just have to write them down,** and **(2) asking a lot of questions.**

It is a shame that some of our most creative minds are trapped in the literary ghetto of science fiction and fantasy. It is there that writers really have the freedom to play with alternative visions of society, government, and human nature. Their works have demonstrated both the positive and negative implications of technology.

At the same time, however, it isn't just the so-called creative people who are creative. Everyone has the potential to use their imagination, either just for simple entertainment, or to find solutions to their challenges.

“Everywhere, you just have to write them down”

While this step is of greatest benefit to the real creative people (i.e. writers and artists), everyone can benefit from keeping a little book around in which they can make a note of any and every good idea. Ideas can come in unexpected places, whether in the shower, on a commute, or in the middle of lunch. Quite often, these ideas are immediately forgotten.

This process is not so much aimed at being creative on demand, but rather, on demand when creativity strikes.

“Asking a lot of questions”

You can go a long way just by asking a question, and teasing out the implications of the answer. For instance, you could begin by asking: “What would the world be like if there were no national borders?”

Immediately, you could start by wondering if that would be a good or bad thing. Would the place you live be flooded by refugees? Would people start creating borders anyway to exclude others? Would companies automatically go where labour costs the least? Questions often lead to other questions.

However, you can look at the issue of asking questions more systematically, and break them down into three major categories:

■ Logical Methods

These methods try to approach the issue in an ordered fashion, building on the possible implications of your initial idea. Logical methods include addressing problems:

1. Systematically, by looking at what would be the implications of the issue (i.e. If there were no borders, that would affect ...)
2. By analysing them into component parts and recombining them (i.e. What happens is travel is an obligation, rather than a privilege? What if you could relocate your entire home at the push of a button?)
3. Taking them to the limits of the conceivable (What if the entire world is just one giant city, separated by green space?)
4. Reversing them and standing them on their heads (What if you needed official permission to leave the house?)

In the actual creative process, it is likely that these different methods will run into each other and combine themselves. It isn't likely that you can escape examining things systematically if you want to approach things logically.

■ Intuitive Methods

These are concerned with leaving reality behind, and can go to the extremes of what is conceivable. Intuitive methods include addressing issues through:

1. Dreamlike, associative, or fantasy thought (What if everyone could teleport?)
2. Search for similar analogous phenomena in other areas of culture and nature and grafting them to our problem (i.e. What lessons can we apply from the Internet to a world without borders?)
3. Taking off from random words or objects (This includes the technique of cut-ups, pioneered by William S. Burroughs, which involves cutting up words from a page, and choosing them randomly, or even fortune-telling devices like the I-Ching, which Philip K. Dick used in the writing of "Man in the High Castle".)
4. The outlandish, the unrealistic, and the absurd (What if everyone was their own nation, and their borders stopped at their skin?)

Again, it is likely that these processes will blur together. It isn't easy to define where a fantasy might end, and something unrealistic and absurd might begin. Think of the categories as different starting points, rather than as two or four or eight different, clearly delineated boxes.

■ Critical Methods

Questions can also use doubt and deconstruction in order to create something new. This can be seen as an offshoot of either of the two methods described above, as at some stage, all ideas that are going to be implemented have to be subjected to some criticism and review. Critique can address issues through:

1. Subjecting past events to hypothetical review (i.e. alternate history or counterfactuals)
2. Examining the current situation for weaknesses or to extend current events to absurd levels (this is basically "reversal", or "taking events to the limits of the conceivable" mentioned above with a different emphasis)
3. Examining proposed solutions for bias or inconsistency

Playing Games

■ Games as Ritual

Anthropologists have suggested that the purpose of ritual is to place the enactors in an altered state of consciousness so that they can better apprehend the numinous. In many ways, ritual allows the participant to discard the trappings of secular existence and enter a different world. It is more than likely that the first games emerged in a ritual context. Chess was first conceived to re-enact the battles of the Persian kings, who, before the advent of Islam, were divine. Similarly, the Mayans played a ball game in a religious context, the rules of which are unfortunately lost to history (though it is not recommended that the losers of any game be ritually sacrificed in the present day).

Games, in many ways, perform a similar function, particularly in the world of workshops and seminars. Within the context of a game, adults can try and do things that would not normally perform under normal circumstances. One can take on different roles, and think up nonsensical ideas which their inner censor could normally suggest against. It is no surprise that games of all kinds have always been popular, and are now perhaps more popular than ever, with the advent of internet gaming.

■ Gaming for Creativity

It can be occasionally helpful to produce a fairytale or science fiction vision of the future, particularly in workshops oriented towards problem solving. Dreaming up such futures can be tremendous boon to creativity, and can also lead to new possibilities and ideas that can be followed up.

As with any other excellent idea, it is important in the context of the seminar that the ideas from games be examined and discussed. The format of any seminar should be flexible enough that good ideas from any source should have some time and space.

2. Interactive Methods for Shaping Our Reality

2.1. “Balint Groups” – A Group Method for Mutual Support

Introduction

Initially, Balint groups were developed as a method of understanding the doctor/patient relationship, and learning the therapeutical potential for empathy and communication with patients. They are named after Michael and Enid Balint, the doctors who first used and developed the process. The method is largely concerned with the psychological implications of general practice, and was first published in the book, “The Doctor, His Patient and the Illness” * in 1957.

The very first Balint group gathered eight General Practitioners in London. These doctors were encouraged by Balint to describe a personal experience with a difficult patient and reflect on its deeper psychological implications. In particular, they were asked to focus on their own feelings, and the emotions the patients might have had. The method calls on the physician to find a balanced approach between treating physical symptoms and addressing the psychological underpinnings of pathology.

Balint groups steadily spread around the world in the format of a weekly meeting of physicians coordinated by a leader. The participants bring cases for discussions with their colleagues and provide feedback to each other. The core of the method focuses on exploring these cases, and the connected feelings and emotions in detail.

* Michael Balint: “The Doctor, His Patient and the Illness”. International University Press, 2002.

■ Who was Michael Balint? And who was Enid Balint?

Michael Balint (1890–1970) was a psychoanalyst from Hungary who emigrated to Britain in the 1930s. After the Second World War he practiced as a psychoanalyst at the famous Tavistock Clinic in London. However, to GPs, he will always be remembered for the work he did in the 1950s and 1960s in helping them to understand their psychology of the doctor-patient relationship. Enid Balint, also a psychoanalyst, was Michael’s (third) wife. She was his colleague and partner in their work on empathy in medicine.

■ Balint Groups in Other Contexts

This document offers suggestions on using Balint groups in contexts outside of medical practice, particularly in education and adult education. It can be used for both support and feedback in the learning process in any field that requires interpersonal communication skills. Such discussions can take place during the learning process, or for professional development.

This form of group work can be particularly effective in educational contexts. Like doctors, it is critical that teachers and other education professionals be able to develop empathy and be able to examine the psychological underpinnings of behaviour, in order to better assist and accommodate learners. Balint groups could be a particularly effective tool for discussing cases of special needs learners, and for supporting the development of classroom management techniques. Education professionals already discuss many of the issues in an informal context.

The Balint group provides a concrete framework and a focus for discussion. Balint groups can be viewed as a method that:

- Creates group consciousness that can be directed towards mutual support
- Focuses on the importance of a personal story
- Leads to group and personal insights
- Provokes associative thinking
- Allows for analysis of complex situations
- Guides individuals towards developing solutions

Suggested Directions for Balint Groups

■ General Overview

When applied in training/seminar environment the Balint groups could be introduced as a method for mutual support and active listening.

The groups should be divided into small groups of 8–10 people. They should be then encouraged to have a personal story along the main theme that has gathered them together. (Possible topics include: experiences with otherness, team performance, personal issues, etc.)

Balint groups traditionally focus on the Doctor-Patient relationship. Similarly, in an educational context, it is recommended that participants discuss one-on-one interactions, with a particular focus on the feelings and emotions that both parties recall or might be experiencing.

Exploring the issues in depth is the main asset of the Balint group. However it makes them a time requiring activity and needs to be taken into consideration.

■ Suggested Phases of the Balint Groups

A Balint group can be structured as follows:

Sharing

All the group members share a story based on a personal interaction in a professional setting (2 min. each). In this phase the idea is to listen to the broad range of experiences present in the group along the selected theme. Everyone should be brief, and provide the general outline, rather than the details.

Selecting a Story

- The group members select one of the stories they would like to explore in detail and the storyteller presents it in depth (10 min.)
- At this point, the storyteller talks, and the group members listens.
- If the storyteller or the group members needs some encouragement, the moderator should focus on getting everyone to think freely, like so: "Think fresh, think freely!"
"Have the courage of your own stupidity!"

Clarification

- The group members ask questions about the story in order to clarify the circumstances (15 min.)
- It is important to note that the questions should be focused on the circumstances rather than feelings. Talking about the feelings might influence the group members and this might diminish the value of the associative thinking. Though emotional states are the focus of the exercise, this part of the exercise is designed to clarify the experience on a sensory level.

Feedback and Free Association

- The story teller receives feedback from the members of the group based on the free associations they have had while listening and questioning (15 min.).
- The storyteller listens, while the group talks. At this point, the members of the group are free to ask questions about feelings and emotions.
- The group members should consider expressing themselves in the following ways:
"It reminds me of the time when ..."
"While listening to your story I thought of ..."
"The associations I have had along your sharing were ..."
- The focus should be on associations with the story, and on the feelings occurring, not on the circumstances.

Based on all that has been heard the group members are encouraged to give support to the story teller as based on their experience, or with ideas produced through free association during the group process. Usually this is a phase when creative solutions are arrived at. However, the goal is not necessarily to find a solution (or even construct a problem), but rather to set a diverse background of guiding thoughts to support the story teller in the learning process.

The group experience can draw the storyteller's attention to areas that have not been previously considered, and can be a source of new insight. The group can also more clearly illustrate certain aspects of the story, either with additional examples, or through their questions. This provides an opportunity for the story teller to look at his/her story from a distance and from a place of neutrality.

Storyteller Response

The story teller shares what insights she/he got with the group members (5mins).

At this point the story teller has the chance to express what was the most valuable for him. What ideas have come to him through the group sharing and also any unexpected solutions and or underestimated issues that have been brought to light.

Evaluation

After the Balint Group a general sharing of the whole group is advised as a reflection of the process and the insights that it brought.

Summary

Balint groups were originally developed for improving doctor-patient relationships. It specifically focuses on the emotions and feelings that the two parties go through, and offers an opportunity for colleagues to provide feedback in a supportive environment.

Resources on Balint Groups

Additional information can be found on the following websites:

- <http://www.balintinternational.com/balint>
- <http://www.balint.co.uk>
- <http://familymed.musc.edu/balint/overview.html>
- <http://familymed.musc.edu/balint/index.html>

2.2. The World Café – A Guide For Hosting Conversations That Matter

What are World Café Conversations ?

World Café Conversations are an easy-to-use method for creating a living network of collaborative dialogue around questions that matter to your life, work or community. Café conversations have been hosted in a multitude of settings, where the need arises to bring larger numbers of people into a dialogue process than can be accommodated by traditional dialogue and circle processes. The World Café (see “www.theworldcafe.com”), is part of a growing global community supporting conversations that matter in corporate, education, government, NGO and community settings around the world. World Café Conversations are also a provocative metaphor for noticing the already existing living networks of conversation through which we develop new knowledge and co-evolve the future together. As we create our lives, our organizations and our communities, we are, in effect, always moving among “table conversations” at the World Café. By becoming aware of this usually invisible process, we can be more intentional about participating in life affirming ways in the ongoing conversations that shape our lives.

When to Choose a Café Conversation

The World Café format is flexible and can adapt to many different circumstances. Cafés have been designed for sessions as short as 90 minutes or for conferences lasting several days. They can stand alone or serve as part of a larger meeting.

■ Café Conversations are especially useful:

- To share knowledge, stimulate innovative thinking, and explore possibilities around real-life issues and questions.
- To conduct an in-depth exploration of key challenges and opportunities.
- To engage people, who may be meeting for the first time, in authentic conversation.

- To deepen relationships and mutual ownership of outcomes in an existing group.
- To create meaningful interaction between a speaker and the audience.
- When the group is larger than 12 (we’ve hosted 1,200) and you want each person to have the opportunity to contribute

The World Café is especially suited for connecting the intimacy of small-group dialogue with the excitement and fun of larger-group participation and learning.

When you have a minimum of one and a half hours for the Café, including harvesting collective insights and discoveries (two hours is much better) – some Cafés have spanned several days.

■ When a Café Is Less Useful

While the World Café can be designed to meet many different purposes, it is not an optimal choice when:

- You are driving toward an already determined solution or “answer”.
- You want to convey only one-way information.
- You are making detailed implementation plans and “assignments”.
- You have less than one and a half hours for the Café.
- You have a group smaller than 12. In that case, consider a traditional dialogue circle, council, or other approach to fostering authentic conversation.

The Café is built on the assumption that people already have within them the wisdom and creativity to confront even the most difficult challenges. Given the appropriate context and focus, it is possible to access and use this deeper knowing.

World Café Principles

Conducting an World Café –

Conversation is not hard – it's limited only by your imagination! The Café format is flexible and adapts to many different circumstances. When the principles below are used in combination, they foster collaborative dialogue, active engagement and constructive possibilities for action.

Clarify the Purpose –

Be clear about why you are bringing people together. Clarifying your intention(s) enables you to determine which participants you'd like to invite and the focus of the questions you'll explore together.

Create a Hospitable Space –

Café hosts around the world emphasize the power and importance of creating a hospitable space – one that feels safe and inviting. When people feel comfortable to be themselves, they do their most creative thinking, speaking, and listening. In particular, consider how your invitation and your physical set-up contribute to creating a welcoming atmosphere.

Explore Questions that Matter –

Finding and framing questions that matter to those who are participating in your Café is an area where thought and attention can produce profound results. Your Café may only explore a single question, or several questions may be developed to support a logical progression of discovery throughout several rounds of dialogue. In many cases, Café conversations are as much about discovering and exploring powerful questions as they are about finding effective solutions.

Encourage Everyone's Contribution –

We are increasingly aware of the importance of participation, but most people don't only want to participate, they want to actively contribute to making a difference. It is important to encourage everyone in the conversation to contribute their ideas and perspectives, while also allowing anyone who wants to contribute through their listening to do so.

Connect Diverse Perspectives –

The opportunity to move between tables, meet new people, actively contribute your thinking, and link the essence of your discoveries to ever-widening circles of thought is one of the distinguishing characteristics of the Café. As participants carry key ideas or themes to new tables, they exchange perspectives, greatly enriching the possibility for surprising new insights and the emergence of collective intelligence.

Listen for Insights and Share Discoveries –

Through practicing shared listening and paying attention to themes, patterns and insights, we begin to sense a connection to the larger whole. After several rounds of conversation, it is helpful to engage in a whole group conversation. This offers the entire group an opportunity to connect the overall themes or questions that are now present.

Café Etiquette

- Focus on what matters.
- Contribute your thinking.
- Speak your mind and heart.
- Listen to understand.
- Link and connect ideas.
- Listen together for insights and deeper questions.
- Play, Doodle, Draw – writing on the tablecloths is encouraged!
- Have fun!

■ World Café Conversations at a Glance

- Seat four or five people at small Café-style tables or in conversation clusters.
- Set up progressive (usually three) rounds of conversation of approximately 20–30 minutes each.
- The groups explore a question or issues that genuinely matters to their life, work or community.
- Encourage both table hosts and members to write, doodle and draw key ideas on their tablecloths or to note key ideas on large index cards or placemats in the center of the group.
- Upon completing the initial round of conversation, ask one person to remain at the table as the “host” while the others serve as travelers or “ambassadors of meaning”. The travelers carry key ideas, themes and questions into their new conversations.
- Ask the table host to welcome the new guests and briefly share the main ideas, themes and questions of the initial conversation. Encourage guests to link and connect ideas coming from their previous table conversations – listening carefully and building on each other’s contributions.
- By providing opportunities for people to move in several rounds of conversation, ideas, questions, and themes begin to link and connect. At the end of the second round, all of the tables or conversation clusters in the room will be cross-pollinated with insights from prior conversations.
- In the third round of conversation, people can return to their home (original) tables to synthesize their discoveries, or they may continue traveling to new tables, leaving the same or a new host at the table. Sometimes a new question is posed for the second or third round of conversation which can help deepen the exploration.
- After several rounds of conversation, initiate a period of sharing discoveries and insights in a whole group conversation. It is in these town meeting-style conversations that patterns can be identified, collective knowledge grows, and possibilities for action emerge.

Once you know what you want to achieve and the amount of time you have to work with, you can decide the appropriate number and length of conversation rounds, the most effective use of questions and the most interesting ways to connect and cross-pollinate ideas. Play, experiment and improvise!

■ The Importance of the Café Question(s)

The question(s) you choose or that participants discover during a Café conversation are critical to its success. Your Café may explore a single question or several questions may be developed to support a logical progression of discovery throughout several rounds of dialogue.

Keep in mind that ...

- Well-crafted questions attract energy and focus our attention to what really counts. Experienced Café hosts recommend posing open-ended questions – the kind that don’t have yes or no answers
- Good questions need not imply immediate action steps or problem solving. They should invite inquiry and discovery vs. advocacy and advantage.
- You’ll know you have a good question when it continues to surface new ideas and possibilities.
- Bounce possible questions off trusted friends or colleagues who will be participating to see if they sustain interest and energy.

A Powerful Question ...

- is simple and clear
- is thought provoking
- generates energy
- focuses inquiry
- surfaces assumptions
- opens new possibilities

■ Five Ways to Make Collective Knowledge Visible

Take a Gallery Tour –

At times, people will place the paper from their tables on the wall so members can take a tour of the group's ideas prior to the "town meeting" or during a break.

Use Graphic Recording –

In some Café events the whole group conversation is captured by a graphic recorder who draws the group's ideas on flip charts or a wall mural using text and graphics to illustrate the patterns of the conversation.

Post Your Insights –

Participants can place large Post-Its with a single key insight on each on a blackboard, wall, etc., so that everyone can review the ideas during a break.

Create Idea Clusters –

Group insights from the Post-Its into "affinity clusters" so that related ideas are visible and available for planning the group's next steps.

Make a Story –

Some Cafés create a newspaper or storybook to bring the results of their work to larger audiences after the event. A digital camera can be used to create a picture book along with text as documentation.

■ How to Create a Café Ambiance

- Whether you are convening several dozen or several hundred people, it is essential to create an environment that evokes a feeling of both informality and intimacy. When your guests arrive they should know immediately that this is no ordinary meeting.
- If possible, select a space with natural light and an outdoor view to create a more welcoming atmosphere.
- Make the space look like an actual Café, with small tables that seat four or five people. Less than four at a table may not provide enough diversity of perspectives, more than five limits the amount of personal interaction.

- Arrange the Café tables in a staggered, random fashion rather than in neat rows. Tables in a sidewalk café after it has been open for a few hours look relaxed and inviting.
- If you don't have tables, you can arrange chairs in a "U" shape and ask people to form a circle when the conversation begins. Place index cards or paper on chairs for noting key ideas.
- Use colorful tablecloths and a small vase of flowers on each table. If the venue allows, add a candle to each table. Place plants or greenery around the room.
- Place at least two large sheets of paper (flip chart sheets work well) over each tablecloth along with a mug or wineglass filled with colorful markers. Paper and pens encourage scribbling, drawing, and connecting ideas. In this way people will jot down ideas as they emerge. Put one additional Café table in the front of the room for the Host's and any presenter's material
- Consider displaying art or adding posters to the walls (as simple as flip chart sheets with quotes), and play music as people arrive and you welcome them.
- To honor the tradition of community and hospitality provide beverages and snacks.
- Use your imagination!
- Be creative!

■ I'm the Café Host, what do I do ?

The role of the Café Host is to help put the Café principles into practice. It's not the Café's style and appearance that's important, but living the spirit of the principles. Hosting a Café requires thoughtfulness, artistry and care. The Café Host can make the difference between an interesting conversation and people accessing their own knowledge and sources of deeper collective wisdom.

- Determine the purpose of the Café and decide who should be invited to the gathering.
- Name your Café in a way appropriate to its purpose, for example: Leadership Café, Knowledge Café, Community Café, Discovery Café, etc.
- Help frame the invitation.

■ Café Supplies

- Small round tables of 90 to 100 cm are ideal, but small card tables will also work.
- Enough chairs for all participants and presenters.
- Colorful tablecloths.
- Flipchart paper or paper placemats for covering the café tables.
- Colored water-based markers.
For legibility use dark colors such as green, black, blue and purple. Add one or two bright colors to the cup (red, light green, light blue, or orange) for adding emphasis.
- A vase with cut flowers, a mug or wineglass per table for markers.
- A side table for refreshments and snacks.
- Mural (10×15 cm) or flip chart paper for making collective knowledge visible and tape for hanging.
- Flat wall space for displaying mural or flip chart paper with key knowledge and insights.
- Additional wall (or window) space for creating a gallery of the tablecloths generated during the Café rounds.

Optional (depending on size and purpose):

- Overhead projector and screen.
- Sound system for tapes and/or CDs.
- A selection of background music.
- Wireless lavalieres for Café Hosts, and hand-held wireless microphones for town meeting-style sessions.
- Easels & flipcharts.
- Basic supplies including stapler, paper clips, rubber bands, markers, masking tape, pens, push pins and pencils.
- Colored 10×15 cm or 13×18 cm cards (for personal note taking).
- 10×15 cm large Post-Its in bright colors for posting of ideas.

- Work with others to create a comfortable Café environment.
- Welcome the participants as they enter.
- Explain the purpose of the gathering.
- Pose the question or themes for rounds of conversation and make sure that the question is visible to everyone on an overhead, flip chart or on cards at each table.
- Explain the Café guidelines and Café Etiquette and post them on an overhead, an easel sheet or on cards at each table.
- Explain how the logistics of the Café will work, including the role of the Table Host (the person who will volunteer to remain at the end of the first round and welcome newcomers to their table).
- During the conversation, answer questions if needed.
- Encourage everyone to participate.
- Remind people to note key ideas, doodle and draw.
- Let people know in a gentle way when it's time to move and begin a new round of conversation.
- Make sure key insights are recorded visually or are gathered and posted if possible.
- Be creative in adapting the Café principles to meet the unique needs of your situation.

■ I'm a Table Host, what do I do ?

- Remind people at your table to jot down key connections, ideas, discoveries, and deeper questions as they emerge.
- Remain at the table when others leave and welcome travelers from other tables.
- Briefly share key insights from the prior conversation so others can link and build using ideas from their respective tables.

Resources on the World Café

Brown, Juanita, Isaacs, David, & the World Café Community: *The World Café: Shaping Our Futures Through Conversations That Matter*. Berrett-Koehler Publishers Inc, San Francisco, 2005.

2.3. Future Workshops

Introduction

The Future Workshop is a method of creating a vision of a desirable future and sustaining that vision long enough to achieve it. It is “a method designed to help people find alternatives to lifestyle or living conditions”. Initially the founder of the Future workshop methodology, Robert Jungk (1913–1994) wanted to create a tool for the socially disadvantaged groups that would enable them to have a say in the decision making processes and in enforcing their interests.

Currently the concept of the Future Workshop methodology applies to much larger settings and can be for a variety of different issues, including community development and large-scale consultation. It is in fact an approach that fosters unconventional thinking in terms of achievable utopias.

The main phases of the future workshop are well defined and consist of:

Critique Phase – designed to draw out specific issues and problems in question

Fantasy Phase – be creative and have fun. Invent a utopia, and draw a picture of future possibilities

Implementation Phase – generated ideas are evaluated on the basis of their practicality. If a solution was found an action plan is drafted and the group sustains regular meetings the so called permanent workshop to monitor the advancement towards the solution that was found.

At present, most of the work with Future Workshops is not aimed at promoting active citizenship (though it can clearly be used for this), but rather to challenge people to think beyond the conventional. The creation of a context for social innovation is a highly dynamic process, going beyond the everyday framework in order to find unexpected solutions. As such the future workshop is still needed and will sustain its importance as a methodology for social learning.

Organising a Future Workshop

Before the workshop begins, the moderator should think about the preparatory work that needs to take place, the objectives of the workshop, the support for potential follow up work, and so on. See the chapter on Moderation for more details.

■ Before it Begins

A Future Workshop should also be kept as simple as informal as possible, so everyone has an opportunity to try it out, and so that none of the participants will feel that they should not speak from lack of experience, expertise, or confidence.

■ Requirements

Before the workshop begins, the moderator(s) should take care to select an appropriate cross-section of interested stakeholders. The facilitator should aim for a mix of people with different skill sets, and of varying experiences.

Necessary materials include the following:

- Large sheets of paper (A1 or A2)
- Sticky-Tac or tape
- Papers for writing
- Markers

Useful materials include the following:

- Pin boards
- Pins
- Coloured cards (A5 or 5" x 8")

Prepare the workspace by placing up large sheets of paper on the wall. Later on, participants can write on the cards and place them up on the wall. The cards can then be sorted and clustered to help visualise the key ideas. It may be necessary to bring in pin boards in order to expand the available space.

Note that the Future Workshops will include both plenary and small group activities, so make sure that that space and resources are available for both.

■ Group Size

Future Workshops are most effective with fifteen to twenty-five participants, as that allows everyone a chance to speak on the topic. For larger groups, it may be advisable to run several Future Workshops in parallel.

■ Facilitator's Role

Ideally, a Future Workshop exists to promote spontaneity and free thinking. However, the moderator has a specific role. In this case, the moderator should focus on ensuring that the proper phasing is observed, and to help participants visualise their ideas. The leader should be familiar with the process, and help encourage the group members to participate and contribute their ideas.

■ The Timetable

Finally, the moderator should provide a time table outlining how long each phase is going to take. A three day workshop might look like this:

- Thursday: Introduction and Critique Phase (18:00–21:00)
- Friday: Fantasy Phase (10:00–13:00, 15:00–18:00)
- Saturday: Implementation Phase (10:00–13:00, 15:00–18:00)

Generally, a ratio of 2 hours of Fantasy and Implementation phase for every hour of Critique Phase is quite reasonable. Hence, a 1 day workshop might look like this:

- Preparatory Phase: 9:30 – 10:00
- Break: 10:00 – 10:15
- Critique Phase: 10:15 – 12:00
- Lunch: 12:00 – 13:00
- Vision Phase: 13:00 – 14:45
- Break: 14:45 – 15:00
- Implementation Phase: 15:00 – 17:00
- Discussion on Future Action: 17:00 – 17:30

Holding a Future Workshop

In actuality, the Future Workshop consists of four phases (the three phases mentioned above, plus time for preparation):

- The Preparation Phase
- The Critique Phase
- The Fantasy Phase
- The Implementation Phase
- The Realisation Phase



The Preparatory Phase

First Steps

The atmosphere should be fairly informal, and participants can be recruited into setting up the room. This can promote a sense of equality among all participants, and allow everyone to work together towards a common goal.

Refreshments can also help, along with a short period where people allowed to chat informally.

Once people have started chatting, the moderator should propose that the participants introduce themselves one by one, leaving them to decide what they want to say. Usually, people want to hear what other people do, and why they are here. The moderator can use this to gauge the interests of the group.

Introduction

Once everyone has introduced themselves, the moderator should introduce the process, and what the participants are expected to do. The introduction at the start of this chapter provides a good starting point.

The moderator can also mention some of the accomplishments of the Future Workshop, which gives the participants a sense of what they can do with the process. For example in a rural region in Russia, a workshop was devoted towards reducing unemployment and exploring potential areas for eco-

conomic development. The result was the creation of a woodworking and small crafts industry. In numerous communities, including in Paris, a community slated for redevelopment produced alternative plans for development which allowed residents to continue living there.

■ Golden Rules for a Future Workshop

The following rules can serve as useful guidelines for a Future Workshop. They should be introduced during the first stages, and the moderator can put them up on a poster.

- Nobody should speak longer than one minute
- All have to stick always with the time; only then the Future Workshop will be successful.
- Everybody has the right to speak: All are waiting until a person finishes her/his speech.
- Participants can show a red card, if someone speaks longer than one minute.

The writing of the cards has a method:

- Readable cards are gold
- Only one aspect per card
- Not more than three lines per card
- Write in both upper and lower case letters for better legibility



The Critique Phase

■ Objectives

This is where the workshop begins. The moderator asks the group to try and provide as many critical objections as possible, from the sweeping and general, to the specific and minor. These complaints are placed up on the wall, and can be sorted for the next phase.

The main problem or topic should be written up on the wall in large letters, visible to everyone.

■ Gathering Complaints

The moderator asks the group for their complaints. Participants can either speak briefly (see the rule above about only speaking for one minute), or write their comments down on a card or sheet of paper which can go up on the wall.

It may start slowly, but as more things get put up on the wall, more people become willing to speak up. Usually, it takes about half an hour for the wall sheets to become filled.

When the time is up, or the complaints become repetitive, discussion can be put on hold. The group can also collectively agree to end discussion.

■ Avoiding Discussion

When the complaints and critiques are going up, it is important to avoid discussion. Remind participants that there will be room for discussion later. This keeps the process of gathering complaints on track.

■ Sorting and Clustering

Next, the comments from the participants can be sorted and clustered, in order to create a smaller number of core complaints.

If all the comments are written on cards or separate pieces of paper, it is a simple matter to rearrange them in order to cluster them. Otherwise, the moderator can draw links between the different topics.

Then, participants can decide on the topics they find most important. This can be done through consensus, through votes on each topic, or by giving participants votes to assign to the topics they think are most important. Each participant can be given three to seven votes to allocate among all the topics.

Keep in mind that during the Implementation phase, participants will develop plans and ideas to address those topics. For each topic the moderator keeps, there will be a group working on that topic. The moderator should have an idea of how many groups he or she wants, and how many participants will be in each group.

■ Example

During the SMILE workshop on the challenges facing intercultural education in South Eastern Europe, participants defined the following as the most important issues:

- Prejudices and stereotypes
- Lack of institutionalised structures for supporting intercultural education
- Lack of information about other cultures
- Historical misinterpretations
- Lack of interest and communication
- Intolerance
- Isolation
- Inadequate formal education



The Fantasy Phase

■ Objectives

In this phase, participants will take the key issues from the Critique Phase, and recast them in a positive way. From this starting point, participants will use their imaginations to create alternative possibilities for the future. From these possibilities, participants will select one or two ideas for further development and elaboration.

■ Introducing the Fantasy Phase

The second phase can begin by a brief review of the events from the day before. It may be helpful to keep up the clustered topics, though if the space is needed to help visualise the products of the Fantasy Phase, they can be taken down and put on handouts for the participants.

The exact method of proceeding can be determined by the moderator, or through a consensus of the participants.

For this phase, participants need to remember to be free, unconstrained, and creative. They should be spontaneous, and shun cynicism and perfectionism. Plausibility can go out the window.

■ Loosening up

A small icebreaker may be helpful to get participants in the mood. Story telling, playing games, or improve sketches can help the group warm up. See the chapter on moderation for additional examples of icebreakers.

■ Positive Statements

Once participants have had a chance to get into the mood, it is time to go back to the results of the Critique Phase. To start, the group can rewrite the most important topics from the Critique phase in a positive form, making them true objectives.

These objectives can also go up on the wall to help participants visualise the outcomes.

Examples of Positive Statements

Looking back to the examples from the Critique Phase (see Example), imagine that the top three topics selected were the following:

- Prejudices and stereotypes
- Lack of institutionalised structures for supporting intercultural education
- Intolerance

These could be re-written in a positive form as:

- To promote diversity and oneness, and to share in a common European identity
- To adjust existing structures in order to make them supportive of intercultural education
- To develop tolerance in dialogue and communication

■ Brainstorming

Once the objectives are laid out, participants may begin brainstorming solutions to the problems at hand. Remind participants that:

- For now, nothing is impossible.
- Think whatever you like, no limits.
- Look at the issue with the fresh eyes of a child.

It may be helpful to start this part with a question. Alternatively, the participants may be divided into groups, if there are a number of core issues which people want to work on separately from the Critique Phase.

As the ideas come out, they can be written up on the wall for easy visualisation. Alternatively, participants can write their ideas on cards and place them up. As more ideas emerge, they will provoke additional thoughts and connections.

Examples of Brainstorming

In the process of brainstorming at the SMILE workshop on intercultural learning, participants came up with the following ideas:

- To be one big Balkan family
- To share a common European identity
- To promote diversity and oneness
- To develop tolerance in dialogue and openness in communication
- To raise funds and find more resources for education
- To develop and commit to common principles for education, and to implement them by using intercultural strategies and methods
- To adjust existing structures in order to make them more supportive of intercultural education
- To develop, establish and commit to intercultural principles

■ Focusing the Issue

As it is impossible to focus on all the ideas, it is important that participants choose some key innovations to introduce to their locality. This can be done through consensus, or by assigning votes, as suggested in the Critique Phase (see “Sorting and Clustering”, pg. 44). It will probably not be practical to vote on each idea.

As with the Critique phase, ideas can be clustered together for groups to work on or refer to. The participants can cluster them together in terms of similarity, or in other ways.

In the process of selection, some things will be lost. It may be a good idea to keep around the ideas that were not selected in an Idea Bank, or “Treasure Chest”, so that participants can refer to them in later stages.

A day-long Future Workshop can proceed to the Implementation phase. Alternatively, in a longer timeframe, participants can try to construct Utopias around the selected ideas.

■ Constructing a Utopia

Participants can work directly on developing a Utopia based on the ideas, or clusters of ideas that emerged from the brainstorming. The idea here is to think about some of the solutions that have emerged, and implement them in an ideal context. Just as with brainstorming, creativity is paramount here.

The key question here should be: Given all necessary resources and cooperation, how would you implement the idea you selected in a local context?

■ Role of the Moderator

The moderator’s role in this stage is to keep the free flow of ideas going. Questions, suggestions of fresh approaches, and prompting can all play a role in this.

Similarly, no idea should be dismissed as too implausible or too impossible. Remind participants to hold of all criticisms until later. In particular, avoid putdowns like, “I won’t work ...” or “That’s absurd ...” Also, there is no need for anyone to apologize for their ideas. No one should say, “It might seem

a bit silly, but ..." or "It may too long, but ..." or "It may be too expensive, but ..."

Participants with criticisms can be encouraged to state their objections in a positive way, as an alternative solution.

Participants should be encouraged to submit as many ideas as possible. They can all be sorted later, and the more there are, the likelier it is that one of them will be what is needed.

Finally, participants should be encouraged to respond to the ideas that emerge. They can be combined, broken down, twisted, and played with. All the produced ideas are part of a public space, and can be freely used.

■ Rules for the Fantasy Phase

The following rules and guidelines can be placed up on the wall, in order to get participants into the proper frame of mind

- Quantity before quality
- Every idea is welcome
- The more unusual the more worthy
- Critics later
- Invest time and energy into the choice
- All ideas have to be visualized
- Create visible starting points
- Results are belonging to all
- Play with ideas: combine, fold, spindle, mutilate
- Replenishment is welcome
- Produced ideas are belonging to the whole group



D The Implementation Phase

■ Objectives

The goal of the Implementation Phase is to proceed from the highly imaginative results of the Fantasy Phase to a practical solution that can be implemented in order to better the lives of the participants. In addition, both criticism and creativity will be combined in order to find the best ways of making the solutions that the participants have created possible, even in the face of obstacles such as lack of funding, bureaucratic inertia, outside apathy, etc.

■ Introducing the Implementation Phase

The phase begins with an in-depth presentation of the results of the Fantasy Phase. This can lead to a further discussion on which points to follow up, or simply a reminder on which points were agreed on the day before. The steps in this phase can be summarised as follows:

Evaluating Innovation – The utopian schemes developed so far are carefully examined to gauge their practicality, both under present conditions, or when conditions are right.

Determining a Strategy for Action – Depending on the assessment and the answers provided, the group can identify what cuts they can make to their original goals, and what strategy they can use for discussing and implementing their objectives.

Creating Results – The group can proceed with creating experimental schemes in which their innovative ideas are carried out.

■ Evaluating Innovation

The first two steps mentioned describe the process of evaluating the ideas or utopian schemes that have been produced in the Fantasy Phase. During that phase, criticism was not allowed, but now, critical assessment is both allowed and encouraged. Some of the following questions can help assess the results:

- Can these proposals be implemented immediately? If not, which ones?
- What are the present starting points? Do any similar projects exist?
- What are the obstacles? What forces need to be overcome?
- How will experts, scientists, and politicians assess the idea?

The key proposals can be set out on a wall in a column, with a matching column for "Actual experiences". It may be that participants have heard of similar strategies that are already being implemented in other countries.

The proposals which are considered too unrealistic can be deleted, or moved to an “Idea Bank” or “Treasure Chest”. By the end of this section, participants should vote on which ideas or proposals they want to continue with.

■ Determining a Strategy for Action

Now that the group has decided on which ideas and proposals they want to work on in the practical phase of the workshop, they need to discuss how they want to proceed with implementation. This can be discussed in a plenary session, or be combined with the next step as a small group activity.

Some of the following questions can help the group decide on a strategy:

- What is the bottom line? What is the bare minimum we want to accomplish?
- How should we proceed?
- How can we save as much of what we want to accomplish as possible?
- What are our current conditions? Politically? Economically?
- Should we start drawing attention to the project, or take a low-key approach? Why?

■ Creating Results

This part of the implementation phase is best carried out in small groups. Later on, in the closing phase of the workshop, all of the groups can come back together in order to present their results.

Here, participants can use all of the ideas they have developed, and all of the skills they have honed in order to create concrete proposals, which can be implemented. Participants are encouraged to think about how they can find sources of funding, or how they can approach individuals in business and in government to assist them.

■ Designing Projects

It is beyond the scope of this section to include a full section on developing projects and project proposals. Also, different groups will have different levels of experience with creating projects, and it is very likely that participants will bring transferable skills from related fields (i.e. experience with writing business plans, legal briefs, etc.). However, the moderator can remind participants to keep in mind the following key terms and questions, which can be included on a handout:

Objectives – What will your project try to do?

Feasibility – Can you do this?

Target Groups – Who will your project reach?

Time Frame – How long will your project take? How long will the separate components take?

Measurable Outcomes – What are the specific things that you will use to decide if you have accomplished your objectives?

Methodology – How will you reach your objectives?

Mechanisms for Evaluation – How will you know if things are working as they should be?

Budget – How much money will you need?

Funding – How will you pay for it all? Who will pay for it?

■ Rules for the Implementation Phase

The following rules and guidelines can be placed up on the wall, in order to get participants into the proper frame of mind:

- Criticize the dream – Not the dreamer
- Ideas are starting points – optimize them
- Questions are meant to help
- Recognize the worthiness of an idea
- Imagine ways of optimizing ideas
- Speak as “I” not as “WE” or “ONE”
- Stand behind your own words
- All are equal!
- Everybody is allowed to criticise ideas



The Reality Phase

■ Participants

As the workshop ends, the participants should seriously consider how they plan to follow up on the results, and what concrete actions they plan on carrying out in order to implement what they have all agreed on. Most projects cannot happen without some degree of sustainable funding, and participants themselves will often have some ideas for this.

It will be helpful during the preceding phase if participants establish a list of key roles, and either volunteer or appoint people to those positions.

■ Moderator

While the ultimate responsibility for future action lies with the participants, the moderator (and the organisation, if the moderator represents one) should also consider what incentives or support he or she can offer to the participants. It may be helpful for the moderator to come prepared with a list of potential donors, so that participants do not leave the workshop feeling resigned to a lack of resources.

■ Documentation

Finally, it will be helpful to produce a formal or informal report of the proceedings. This can be relatively informal, and disseminated over email so that participants have a quick reminder of what they have achieved in the workshop.

Success

The idea of a Future Workshop is not simply to develop project proposals. The Future Workshop is thought to be a transformative process, where participants are exposed to the possibility of making active change in their immediate environment. Participants who go on to better their homes and communities are the optimal goal of this process, but this is not an easily measurable outcome.

The Future Workshop was conceived to let hope triumph over apathy. Let that be the case with yours.

Summary

The Future Workshops was originally developed to give citizen groups with limited resources a voice in the decision-making process. It is a three-stage process designed to produce innovative solutions to problems. The Critique Phase produces a critical understanding of the problem, which, when stated positively, provides the basis for dreaming about the future. The Fantasy Phase calls on participants to dream, to imagine, and to hope, defining a radical vision of the future for themselves. Finally, the Implementation Phase translates hopes and dreams into practice.

Resources on Future Workshops

Apel, Heino: The Future Workshop. Available from: "www.die-bonn.de/esprid/dokumente/doc-2004/apel04_02.pdf"

Jungk, Robert: Future Workshops: How to Create Desirable Futures. Translated by the Institute for Social Inventions. Institute for Social Inventions, UK 1996.

The Future Workshop (In German): "www.zukunftswerkstaetten.com"

Future Workshop Library (In German): "<http://www.jungk-bibliothek.at>"

2.4. Open Space Technology

Introduction

Open Space Technology is an alternative method of organising conference, and has been successfully used for meetings as large as two thousand people. It is an effective way to break the usual boundaries of moderation and meetings, which require intense preparation of content, and which has limits on the amount of interaction between presenters and participants.

Open Space fosters creativity, requires personal responsibility, and encourages people to take on roles that they would not normally adopt. It assumes that a group have people who have gathered to discuss a topic have the competence and the desire to create change. It is also self-organising, as the pre-determined agenda is defined only by the title of the event. The title is the core of the pre-preparation, as it draws participants, and sets the direction of the conference.

Harrison Owen originally developed the method as a response to how he was told that the best parts of his conferences were the coffee breaks. For the participants, these conversations were seen as dynamic, and allowed for real connection between individuals. However, the results of these conversations are generally not recorded, and tend to be unavailable to a wider audience. Open Space tries to reverse the usual conference form, providing an open space and free time in contrast to pre-planned rooms and pre-planned events.

■ Essentials of Open Space

The event begins with an opening by the moderator. All participants assemble in a large area. The moderator introduces the theme of Open Space, and the process, with its four principles and one law. The moderator also explains how the results of each workshop should be recorded and submitted, and placed up for public display on the Bulletin Board.

Finally, the moderator invites all participants to create workshops and place them up on the schedule or marketplace of ideas. When the schedule is filled out, or when participants have run out of topics, everyone goes on to the breakout spaces and conducts their workshops.

Periodically, participants can check the Bulletin Board in order to keep track of what is going on in other workshops, and leave their comments. People will also add new workshops to the schedule of ideas as the inspiration strikes them. Workshops may also inadvertently happen outside of the breakout spaces, in smoking areas, and around snacks.

At the end of the Open Space, participants can share their experiences and evaluation with the group. Another round of Open Space can be held, with an emphasis on creating projects and ideas for actions.

Finally, all of the results should be compiled, and distributed to the participants.

■ The Four Principles

Whoever comes is the right person.

Open Space is built around the idea that everyone has the capability and potential to contribute. Hence, welcome everyone.

Whatever happens is the only thing that could

happen. Open Space is designed to provoke a creative response from participants, and the results may be surprising. It is important that both organisers and participants allow themselves to be surprised.

Whenever it starts is the right time.

Creativity cannot be scheduled. Hence, whenever it starts is considered to be the right time.

When it's over, it's over.

Or, "When it's not over, it's not over." If a workshop has to continue outside of its allotted time, it can continue. Similarly, if a workshop ends early, it ends early. The schedule is built to accommodate the needs and creative energy of the participants.

■ The One Law

The “Law of two feet” is what defines Open Space. People are asked to take responsibility for what they care about. They are free to move around as they choose. In effect, the Open Space Conference begins by asking participants to become workshop facilitators. It also demands that participants take responsibility for their time, and to be authentically present.

■ The Benefits of Open Space

The Open Space methodology can bring key benefits to a large gathering:

- Creativity, energy, commitment, cooperation
- Shared leadership is built – growth from within
- Participants have responsibility for what does or does not happen
- Participants have the opportunity to express what they consider important
- Action plans and work teams emerge from discussions
- A record is created of the entire proceeding
- Relatively inexpensive method for large groups

■ Pre-requisites for Open Space

Open Space is most effective in certain situations, namely:

- When a real issue of concern exists
- When the situation or problem is complex
- When diversity and/or a variety of different opinions exist
- When an urgent decision is needed
- When no preconceived outcome exists

Conversely, Open Space is much less effective if the organisers intend to deliver pre-determined content. It is also not needed if the solutions to a problem are preset, or if there are only a few, pre-determined choices available.

Planning an Open Space

While the planning for Open Space does not tend to focus on content, a large amount of logistical support will still be required.

■ The Topic

During the first stage of the planning process, it is important to ask yourself, “Is Open Space right for the event?” Do the five pre-requisites described above apply?

Also, it is important to ask yourself if you are willing to surrender control of the process, and leave the results to the participants.

The topic for Open Space is critically important. Since there is no timetable, no panel of experts, and no set workshops, the only thing that will draw participants and engage their attention will be the topic. It needs to stimulate the imagination, accept different points of view, and allow for open-ended solutions. It can also help to have a topic which is current, and has a sense of urgency about it. In addition, the topic should not anticipate results. If set results are needed, perhaps a different format might be more effective.

Finally, while you can elaborate on your topic in the invitations, it is best to have a topic that is catchy, and one sentence long.

■ Invitations

The invitations for the event should have the topic. If the participants are largely unfamiliar with Open Space, it may be helpful to provide a brief introduction (see the introduction to this chapter).

■ Logistics

Open Space requires unique logistics, as it needs to accommodate both large plenary events, and small group activities in ‘breakout spaces’. Also, there need to be common spaces for the schedule (the ‘Marketplace of Ideas’) and the results from each workshop. It is almost necessary to have a pho-

tocopier on the premises, since the results from each workshop should be regularly posted up, and so that everyone can take home a copy of the results. As logistics is so important to the process, and as many of your support team may not be familiar with Open Space, it is very helpful to create a physical checklist which lists all of the things that need to be at the location, and all of the things that need to be set up.

The Marketplace of Ideas

The marketplace of ideas is a space where participants can post up the titles of their workshops so other participants know where and when to go. It should have the time slots listed across the top, and the names or other designations for each breakout space along the side. Participants can write the titles of their workshops on A3 or A4 paper, and post them directly onto the grid to form a timetable.

Remember, participants will need some way of sticking up their workshop titles. Tape is a possible solution. Sticky-tac, or something similar, is probably a better choice as items stay up better, and are also easier to take down.

If space is more limited, each breakout space can be designated by a different coloured Post-It, and each Post-It can be tagged on to a posted workshop to show where it is going to be held. The four principles and one law should also be visible in this space.

Necessary items for the marketplace of ideas include:

- Markers
- Sheets of A4 paper
- Large sheet of paper (A1) or banner showing the time slots for events, and breakout spaces
- Tape or Sticky-Tac

Useful items for the market place of ideas include:

- Coloured Post-It notes
- Microphone system

Breakout Spaces

Ideally, the 'breakout spaces' should share the same common space, so participants are free to observe what is going on in other groups and join

them if that is their desire. Breakout spaces are probably best designated by colour, with perhaps a little banner or coloured sign, so participants can visually identify where they are supposed to go. Small flags might work particularly well.

Breakout spaces should be set up for 6–12 people, with the option to add additional seating if the workshop grows. No session should leave the impression that it is full.

The necessary items for each breakout spaces include:

- Large sheets of paper for visualising ideas
- Sheets for documenting the session (Open Space Protocols)
- Pens
- Writing spaces (clipboards, or small tables)

Other useful items for each breakout space include:

- Pin boards (also useful to separate the breakout spaces from each other)
- Chart paper and stand

The Bulletin Board

A Bulletin Board can be set aside for the results of each session. It can also be given a catchy name, like "Breaking News". The moderator, service team, or participants can post up the results of each workshop (i.e. the protocols) on the board, and some space should be set aside for comments and questions.

Ideally, the results from each session should be blown up (from A4 to A3, or from Letter to Ledger) for easier reading.

Time Frame

An Open Space event is usually organised for three days. The first two days are for the actual Open Space event, and the final day is generally reserved for evaluation and for creating plans for future action based on the results thus far achieved (see "Action Space", pg. 56).

Set aside one to one-and-a-half hours for each workshop. However, as the fourth rule states, "When it's over, it's over". Expect that some workshops will go over the allotted time. Also, make sure

there's some time (ten or fifteen minutes is fine) between each workshop so participants can finalise the results, and submit them to the moderator and the team.

Building a Team

In general, one moderator could probably handle an Open Space of 30 people, just as one moderator could handle such a group in a regular meeting or conference. For a larger space, it is almost certain that the moderator will need a team. There are no hard and fast rules on team size, but keep in mind what the team will be expected to do, which will be described in more detail in the following section.

Food

Because of the flexible nature of Open Space, it is traditional not to have set meal times. Snacks, especially items like cut, fresh vegetables, biscuits, and sandwiches can be made available for participants all day.

However, most hotels will insist on having a set mealtime for catering. In that case, ask for a flexible window and a buffet-style meal so late-coming participants can get their food.

It may be more useful to provide participants with cash or coupons for food, and a list of local restaurants within walking distance of the venue. This way, breakout groups can move directly to meals.

Computing Centre (optional)

It can be useful to set up a computer station where participants can type up the results from their sessions. The computers do not need to be networked, but they should be connected to a printer.

One computer per 40 participants is generally sufficient. Most participants will prefer to handwrite. However, if all results are inputted electronically, the final documentation can be produced on CD.

Other electronics equipment, including digital cameras and camcorders can also help to provide a multimedia record of the event.

Running an Open Space

■ **Introducing Open Space to the Participants**

Begin with an introduction to the topic, and to Open Space. The introduction to this chapter, and the preceding section on "What an Open Space might look like" can be used to provide a brief explanation of the format.

The Four Principles and the One Law

The four principles and the one law are described on page 50. They should be described to the participants, so that they are aware of their responsibilities. Ideally, they should be written up on a poster for everyone to see and visualise.

Responsibility of the Participants

The Open Space only functions if people self-organise, and contribute the best that they have to contribute.

It should be noted, however, that nobody is obligated to participate, but everyone did make a choice to be present and show interest in the topic under discussion. Nobody is even obligated to appear at their workshop, but it is polite to make an appearance. Still, everyone is free to leave a workshop at anytime, and a workshop can be cancelled or moved depending on the interests of the participants. The moderator should leave decisions of participation to the participants, and even people who do not directly attend workshops can contribute in other ways (see the next section on Butterflies and Bumblebees).

The core responsibility of the participants, however, is to ensure that someone records the results of each workshop (sample protocols are provided at the end of this chapter). This will ensure that documentation gets created by the end of the session.

Butterflies and Bumblebees

In many Open Spaces, it is common to show a drawing of a butterfly and bumblebee. The moderator can also explain that some participants will be butterflies, and others will be bumblebees. This

can be seen as an extension of the Law of Two Feet: some people will spend the majority of their time travelling around between groups. The Butterflies and Bumblebees should be explained in order to show that there are other methods of contributing to an Open Space outside of attending workshops.

Bumblebees describe participants who travel between the different groups, cross-pollinating them with shared ideas.

Butterflies describe participants who tend travel between the different groups for the social experience. They often congregate with each other in snacking or smoking areas, and in effect, form new groups for discussion.

The Marketplace of Ideas

In some ways, the marketplace of ideas is where Open Space starts. Harrison Owen, the originator of Open Space, took his inspiration from the billboard at a village market in Africa. Through this means of communication, the residents of that community were able to organise extraordinary events and celebrations without any central planning. Through this process, participants of the Open Space can do the same.

The marketplace of ideas is where the participants create the schedule for the Open Space. The supplies and materials necessary for this have already been described on pg. 52. Give the participants the materials, and allow them to announce their workshops, and post them up on the schedule. If a microphone system is available (and such a system may be necessary, depending on the size of the venue and the number of participants), people can use it to make their announcements. Once the supply of ideas is exhausted, participants can move on to the breakout spaces.

As mentioned in the section on logistics, there are different ways of designating which workshop takes place in which space. Whatever the moderator decides on, participants should have some clarity on where they are supposed to go.

■ The Role of the Moderator

The moderator's main role is to organise the logistics, arrange the plenary events, and provide consultation and support to participants who require it. The moderator should be on hand to address any questions regarding the methodology or the organisational aspects of the event.

In some cases, co-moderators may join working groups in order to help participants visualise their discussion, and to assist with the recording of the workshop. This may be required, depending on the context, as some groups of participants may have very little experience with such skills. Again, co-moderators should be careful not to interfere factually in any workshop, and allow participants the freedom to talk about things in their own way.

■ The Role of the Team

The moderator will generally require a service team in order to provide all the materials necessary for the Open Space. The materials needed have already been discussed in the section on logistics. The team will be responsible for:

- Preparing the rooms (see "Planning an Open Space", pg. 51)
- Making a list of the present participants
- Assisting participants, when they need help with a topic or the timetable
- Updating the marketplace of ideas, if it is needed
- Communicating with the moderators and the participants about results and protocols
- Updating the bulletin board with results and protocols, and compiling them for publication
- Keeping the moderators aware of issues regarding organisational processes
- Making a visual record of the event with a camera or camcorder (optional)
- Making sure that there is food and drinks available (optional)
- Producing the documentation

Open Space Technology

Suitable for greater periods of time, from one to two days, and requires some time for people to familiarise themselves with it.

Radically challenges people to experience the “freedom shock” through the freedom of self-organization

Welcomes all the ideas relating to the topic, and allows surprising ideas to develop

Allows people to take responsibility and to discuss what interests them.

Allows for collaborative learning, accessing of combined intelligence, and discovering actionable knowledge – in a more surprising way

Allows for a twisting and circuitous route to coherence.

World Café

Suitable for short time spans of up to two hours, as it brings the people straight into the topic

The Café ambiance is comfortable and allows to people the chance to relax and contribute without challenging them to come up with their own issues of concern

People have engaging conversations in previously defined topics of interests

A fast way of collecting contributions from the present people to all selected topics

Allows for collaborative learning, accessing of combined intelligence, and discovering actionable knowledge

Accelerates the path to coherence

Table 1: Comparison of OST and the World Café

Open Space Technology

Self-organising

Fixed in time and space, over a few days.

Focuses on a topic as understood and interpreted by participants.

Allows people to take responsibility, discuss, and act on what interests them.

Challenges people to experience “freedom shock”

Works to create sustainable, positive, and long-term change by mobilising the interests and passions of participants.

Appreciative Inquiry

Self-organising

Can be distributed over a long period of time: weeks, months, even years.

Focuses on asking and discovering positive and affirmative topics, questions, and ideas.

Allows participants to take responsibility, discuss, and act on what interests them in a positive fashion.

Challenges people to think positively.

Works to create sustainable, positive, long-term change by building and extending existing best practices, and an idealised vision of the future.

Table 2: Comparison of OST and Appreciative Inquiry

■ Closing the Open Space

Open Space should be closed with a plenary meeting, where participants can share their experiences with each other.

Action Space

After the closing of the Open Space, it is possible to cement the results by holding a special section on designing projects or other future actions based on the discussions during the workshops.

Compiling Results

One of the key features of Open Space is the capability to produce a record by the end of the session. At the end of the Open Space, ensure that all of the protocols describing the results of the work. If possible, include a list with everyone's contact information (this step may not be practical for truly large Open Space events).

Alternatively, if there are enough computers available for the results of all workshops to be typed, the documentation can be distributed at the end of the workshop on CD-ROM. This can allow for additional multimedia content, including pictures and videos.

Advanced Open Space

Open Space can be combined with other interactive methods, such as Future Workshops, the World Café, and Appreciative Inquiry. The nature of Open Space is to be free, so the simplest way to integrating these other methodologies is to ensure that participants are present who have an interest in running such an event, and allowing them the time and space to do so.

■ The World Café and Open Space

The World Café is a methodology based on having dynamic conversations in a café-style setting. Further information on the method is available on pg. 37.

The World Café is a more heavily structured methodology than the Open Space. There is a set process, and a set time when participants are expected to move between tables. Hence, some facilitators suggest that the World Café should come first, as the open format of the Open Space makes it more difficult for participants to go back to a more heavily structured meeting.

With small groups, it is possible to use the World Café format for breakout spaces. Each breakout space could be a café-style table, though depending on the size of the groups, participants may end up pushing tables together. As with the standard World Café, the groups can draw on the tablecloths and use them for visualisation. This would lend a more informal dynamic to the Open Space, but could be particularly effective depending on the context.

Another possibility is to use the Law of Two Feet with the World Café. Allow participants the freedom to move around as they see fit, rather than changing participants at set intervals.

Table 1 (see page 55) shows is a non-exhaustive list of some of the key differences between the two methodologies.

■ Open Space and Appreciative Inquiry

Open Space is particularly compatible with Appreciative Inquiry, as both are self-organising methodologies that rely on mobilising participants. The key difference is that Open Space delineates a time and space for the event to occur. In contrast, Appreciative Inquiry can take place over a long period of time: weeks, months, or even years.

Appreciative Inquiry generally asks for participants to ask positive questions and seek best practices. Hence, with the right topic, an entire Open Space can be grounded in an Appreciative Inquiry approach. Alternatively, participants can be first introduced to Appreciative Inquiry in plenary meetings, and then given a chance to apply their newfound knowledge in Open Space.

Open Space could also be used to run specific Appreciative Inquiry events, such as single meeting, or as part of a progressive series of meetings, each focusing on a different stage of the 4-D cycle. Imagine an Open Space for an organisation entitled, "What are the best learning practices an organisation has to offer, and how can we share them?" The process of Appreciative Inquiry can bring up complex issues of concern, which can engage participants: in other words, ideal topics for Open Space. (For more information on Appreciative Inquiry, see pg. 59).

Table 2 (see page 55) shows a non-exhaustive list of differences between Appreciative Inquiry and Open Space

Summary

The Open Space is a unique large group event that is based on the resources and innovativeness of the participants. It abstains from an agenda for conference, and calls on the participants to self-organise and steer the event themselves. The participants define what they want to talk about, and when they want to talk about it. The moderators provide the space, the time, and the technical and organizational support.

Resources on Open Space Technology

Owen, Harrison: Open Space Technology: A User's Guide. Berrett-Koehler Publishers Inc, San Francisco, 1997.

World Wide Open Space: "<http://www.openspaceworld.org>"

Change Management Toolbook: "<http://www.change-management-toolbook.com>"

Open Space Protocol

Name of Event:

Issue/Topic:

Convenor:

Important results and/or recommendations:

Participants:

2.5. Appreciative Inquiry

Introduction

■ What is Appreciative Inquiry?

Appreciative Inquiry explores what works, whether with regards to organizations, processes, and relationships. It is based on the idea that asking questions can shape reality, and that questions and dialogue about strengths, successes, values, hopes, and dreams can lead to further development of such things.

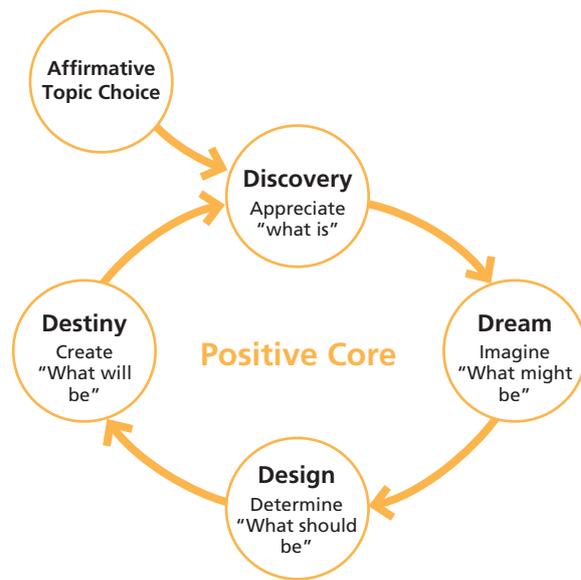
At its heart, Appreciative Inquiry is the sum of its parts: it is based on the importance of recognising and affirming the value in the people and systems around us, and also on examining, studying, and exploring that value. Simply put, Appreciative Inquiry is about calling on people to ask positive questions, and acting on the answers that one receives. Hence, it breaks out of the traditional moderator-participant dichotomy, and truly engages and demands interactive input from everyone.

Like Open Space (see pg. 50), Appreciative Inquiry is self-organising. Unlike Open Space, it can take place outside of a set space and time, and can be an ongoing process that participants engage in over a long period of time. Hence, it can be a long-term, sustainable approach to change management, rather than simply a time-limited intervention.

The idea behind Appreciative Inquiry is so simple that most people, when they talk about it, feel the need to dress it up a little. Many corporations choose to call it something else when they implement it. The fact, however, is that Appreciative Inquiry has been quite successful in the past. It works because it relies on existing social networks, and on the human need to socialise.

As someone implementing Appreciative Inquiry, however, it is important not to lose sight of the fact that it relies on people to willingly participate and share their stories. It should not become another mechanical process or checklist which people tick off.

The 4-D Process



Appreciative Inquiry is based around the 4-D process, as described in the diagram above. It borrows somewhat from Systems Theory, and is based around the idea of a positive feedback loop. Each part of the positive circle directly or indirectly reinforces another part.

■ Affirmative Topic Choice

The 4-D cycle begins with identifying Affirmative Topics. Since Appreciative Inquiry is based on the idea that human systems are shaped by what they study, choosing a topic is of particular importance. The selected topics become an organisation's agenda for learning and innovation.

Hence, Affirmative Topics are of strategic importance to organisations participating in an Appreciative Inquiry. It can be an aspect of the organisation's positive core, which has strong potential to further the organisation's successes. It could also be a problem stated in the affirmative. Or, it could be a competitive success factor the organisation needs to learn more about.

■ Discovery

Discovery describes the process of finding out what is the best in the present environment. Even at an organisational level, it is generally conducted through one-on-one interviews, though it can also include focus groups, large meetings, and even Open Space conferences or World Cafes. In any form, the Discovery stage involves affirmative conversations among members of an organisation, including external stakeholders, and the local community. The goal of the process is to create:

- A description of the organisation's positive core
- Organisation-wide sharing of best practices and exemplary actions
- Enhanced organisational knowledge
- Possible emergence of unplanned changes

Discovery begins with the creation of appreciative interviews. A key part of the decision making process in this phase is to decide who will create those interviews, what kinds of resources and training will be applied, and how they will be used.

Interviews

Appreciative interviews are usually structured in the following way:

- The title (usually the Affirmative Topic)
- A lead-in, that introduces the topic
- Two to four questions that explore different aspects of the topic

Lead-ins introduce participants to the Affirmative Topic. Hence, they are important in setting the mood for questions and responses. Effective lead-ins will already set a positive tone, and may work to give an image of the topic at its best. In addition, lead-ins should be personal, and appeal to individuals, rather than organisations. They should focus on the personal experience, even if the topic relates to hard topics like strategy and quality.

Questions follow the lead-in, and can talk about the past, present and future. Questions relating to the past tend to come first, and they invite the person being interviewed to reflect on high point experiences, followed by an additional question that helps people extrapolate what they have learned.

Questions about the present would ask about what is best in present conditions, and offer similar opportunities for reflecting and extrapolating from what is happening now. Finally, questions about the future offer an opportunity to dream and imagine greater possibilities.

Example Topic: Creativity

Example Lead-In: We all have the power to be creative, and to apply our creativity in our day-to-day lives. There are times when we have all used our abilities to think beyond our immediate realities, both for fun, and to overcome challenges. Creativity can be tremendous competitive advantage on both an individual, and an institutional level.

Example Question

- What was your most creative moment? What was the high point of this experience? What did it feel like? How did you use this experience with other people?
- What are the most creative things that your organisation does? How does it use creativity?
- What three things might be done to make your organisation more creative?

■ Dream

The Dream stage tries to explore what might be. It tries to get people to collectively explore their hopes and dreams for their work, their relationships, their organisation, and the world. It provides an opportunity for people to envision better and more valuable futures, stronger results, and contribute to the world they want.

It is typically conducted in large group forums, so that everyone's dreams and hopes can be shared within the organisation.

Dream shares many similarities with the Fantasy Phase of the Future Workshop, and hence, many of the suggestions there could be used for this step in the process. The key here should be to bring in a representative sample of key stakeholders, and to promote creative, playful dreaming. People should be willing to talk about what they really want.

At the end of the Dream stage, people need to choose which of the visions of the future they want to take away. As with the Implementation Phase of the Future Workshop, all the participants should collaboratively decide how they want to document and preserve the results of this phase.

■ Design

Design should bring in a diverse group of people, from different ages, fields, and people who are actively involved in organisational design. In this stage, participants draw on their discoveries and dreams in order to create provocative statements that list the qualities they desire their organisation to have. While it is about shaping organisations, also tries to go beyond the standard process of creating organisational charts, and structured hierarchical relationships. It is based around the idea of creating statements, which are written in the affirmative, and should provide clear images of how things should look in the future.

■ Destiny

The Destiny stage is the final phase of the 4-D cycle. It calls on all members of the organisation to take concrete actions in order to contribute to the positive future image established in the Design stage. In an organisational setting, Destiny activities usually begin with a large group forum, and continue with small group activities. The Destiny stage will generally consist of a large number of small changes throughout the entire organisation, rather than a single, overwhelming transformation.

■ Deficit-based Change vs. Positive Change

Most problem solving (even the Future Workshops) relies heavily on deficit-based change. Someone identifies a problem, and people are drafted in to diagnose problems, discover the causes and consequences, identify needs, and then solve them. At its best, a deficit-based solution creates a plan, which, when successfully implemented, solves a particular problem.

Systems theory tries to examine systems in order to determine the perfect point of intervention in order to break out of a negative feedback loop. Some have termed it the dismal science, since it does a very good job of explaining why most solutions to problems don't work. Conversely, Appreciative Inquiry might be considered the joyful science, and it ignores negative feedback loops in favour of building a positive one.

Appreciative Inquiry can be a whole-system process, which identifies what is best within a system, and tries to share that throughout the system. It builds on existing competencies in order to create a self-sustaining, positive feedback loop. It gives participants an opportunity to think positively, and work towards realising their dreams and aspirations. At its best, it provides an ongoing capacity for positive change.

Implementing Appreciative Inquiry

■ Choosing an Approach

Each Appreciative Inquiry process tends to be tailored to a particular situation, even if they follow the general flow of the 4-D cycle. There are, however, some key choices to make in the process of implementing Appreciative Inquiry. The following are some key questions to ask when designing a process for your organisation:

- What is your overall change agenda? What are you trying to accomplish?
- What kind of engagement will best suit your needs?
- What is your overall inquiry strategy? What decisions and steps must you make to ensure success?

Form of Engagement	Description	Ideal for:
Whole-System Dialogue	All members of the organisation participate in Appreciative Inquiry. Takes place at multiple locations over extended period of time, and tries to integrate different departments and divisions.	<ul style="list-style-type: none"> • Building leadership capacity, and identifying and developing future leaders. • Transcending communication barriers. • Creating a learning culture with an organisation • Enhancing capacity for positive change.
Appreciative Inquiry Summit	Large group of people participate in a two to four day Appreciative Inquiry process.	<ul style="list-style-type: none"> • Planning, decision making, innovation. • Creating a vision of the future. • Forging alliances and partnerships. • Beginning new organisations or initiatives.
Mass-Mobilised Inquiry	Large numbers of interviews conducted throughout a city, community, or world. Interviewees are mobilised to perform further interviews.	<ul style="list-style-type: none"> • Transforming community self-image. • Building relationships between diverse groups, and groups in conflict. • Creating positive action on a large scale.
Core Group Inquiry	Small group of people selects topics, crafts questions, conducts interviews.	<ul style="list-style-type: none"> • A quick start. • Building a base for future action and dissemination.
Positive Change Network	Members in an organisation are trained in Appreciative Inquiry, and are provided with resources to initiate projects, share materials, stories, best practices.	<ul style="list-style-type: none"> • Stimulating improvisational positive change at the grassroots level by providing people with tools and resources. • Enhancing strategic learning potential for the long term.
Positive Change Consortium	Multiple organisations collaboratively engage in a Appreciative Inquiry 4-D process to explore and develop a common area of interest	<ul style="list-style-type: none"> • Giving a voice to the customer/client/community. • Transform an industry or field of work. • Bringing together customers, suppliers, and providers.
Appreciative Inquiry Learning Team	Small group of people with a specific project conducts an Appreciative Inquiry project.	<ul style="list-style-type: none"> • Fostering employee and professional development. • Enhancing cross-function, cross-departmental teamwork. Improving organisational processes.
Progressive Appreciative Inquiry meetings	Organisations, small groups, or teams participate in Appreciative Inquiry over the course of 10–12 meetings.	<ul style="list-style-type: none"> • Can be adapted to any other form of engagement.

Table 3: Forms of Engagement

■ Change Agenda

The Change Agenda can be seen as a statement of what the process of Appreciative Inquiry will accomplish. It is an attempt at articulating the overall direction of the process. Appreciative Inquiry has been used in the past to accomplish all of the following Change Agendas:

Organisational change – This includes strategic planning, changing organisational culture, improving customer satisfaction, leadership development, and business improvement. Most of the published information on Appreciative Inquiry focuses on this topic.

Inter-organisational capacity building – This can include merger integration, building partnerships, and resource sharing.

Community development – Appreciative Inquiry has been successfully used for international community development. It is an effective way of discovering community assets, and building upon them. It also has potential for finding alternative means of economic development, educational reform, and peace building.

Global transformation – The process has been used for building global organisations, and to raise awareness about global issues.

Small group development – Appreciative Inquiry can also be used on a small scale, for team building, and to develop and transform personal relationships.

Inter-group change – Tied to peace building, Appreciative Inquiry has been used for improving relationships between groups of people in conflict.

Personal/relational transformation – Appreciative Inquiry can also be used on the personal scale, for self-motivation and personal development. It can also be used for counselling and therapy. A substantial number of self-help and motivational techniques are based on principles that are similar to Appreciative Inquiry.

The Change Agenda will influence the Affirmative Topic that initiates the 4-D Cycle.

■ Forms of Engagement

There are different ways of applying Appreciative Inquiry. It can take place over a period of days, or can occur over an extended period of time. Some methods require significant resources and commitment, while others can be seen as a different way of approaching work already performed on an individual level. The exact method chosen should relate to the overall Change Agenda: Is it enough to change relationships and working methods, or is there a need for total organizational transformation?

Thus far, eight core Forms of Engagement for Appreciative Inquiry have been identified. All of these can be used effectively for non-profit work, as well as for organisational improvement in business. Some of these are substantially more complex than others.

They can be summarized as shown in **Table 3** (see facing page).

At present, these Forms of Engagement can be considered a starting point. Organisers of Appreciative Inquiry should feel free to innovate and develop new forms to suit local needs.

■ Inquiry Strategy

Appreciative Inquiry is full of choices, where the organisers can decide on how and what to shape. The choices also gradually evolve over time, as the results of each part of the 4-D cycle get fed and brought back into the process.

The Inquiry Strategy is a plan for how the process will take place over time. It should describe who will do what, and when, and how in order to achieve the overall Change Agenda. It is, however, also a framework for innovation, as it requires constant reflection on the strengths and opportunities of the organisation, as well as its challenges. As these things change, whether due to outside forces, or the Appreciative Inquiry process itself, the strategy needs to change as well.

Table 4 summarises the key choices in developing an Inquiry Strategy (next page).

Phase in the 4-D Cycle

Decisions to be made

Getting Started –

Decision makers are introduced to Appreciative Inquiry, supporting infrastructure established, participants engaged.

- Is Appreciative Inquiry right for the organisation?
- What is the Change Agenda?
- Who will be on the advisory team?
- What training does the advisory team need?
- What Forms of Engagement will be used?
- What will be the Inquiry Strategy?
- How and when can the process be introduced to the organisation?

Affirmative Topic Choice –

Topics selected in order to guide the organisation's learning and evolution.

- Who will select the topics?
- Which topics will be studied, and why?

Discovery –

Crafting Appreciative Inquiry Interview Guides, conducting interviews, understanding what is being learned.

- Who will create the questions and the interview guide?
- Who will be interviewed?
- Who will conduct interviews? How many interviews?
- What training will interviewers need?
- Who will examine the data? How?
- How will we communicate stories and best practices?

Dream –

Individual and collective imagination about the future, group dialogues, enacting positive images of the organisation's future.

- Who will we involve?
- What experiential activity can we use to examine the future?
- What will be the outcome of the dream?

Design –

Collaborative identification of the social architecture, and crafting Provocative Propositions, or descriptions of the ideal organisation.

- What is being designed?
- Who needs to be involved?
- How do we describe the ideal organisation?

Destiny –

Unleashing self-organised innovation and action.

- How will we gather stories about what we have achieved?
- How will we celebrate?
- What are the parameters for self-organised action?
- How will we self-organise?
- How will we support ongoing success?