

## The Workshop Method

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## Planning Conversation: Workshop Method



The Workshop Method, developed by the Institute of Cultural Affairs, can be used with diverse groups and for varied purposes. The model can successfully be used to achieve the following outcomes:

- Generate, organize and synthesize diverse ideas into a cohesive statement or plan.
- Surface seemingly diverse perspectives in a way that identifies common themes and directions.
- Build consensus and ownership in large groups.
- Encourage integrated thinking.
- Develop vision statements.
- Identify underlying constraints and patterns.
- Identify strategic directions.
- Synthesize a large group evaluation.
- Develop action and implementation plans.
- Serve as a visual organizer for information.

Like many other processes, the Workshop Method can be used alone or as part of a sequence of processes in an overall planning process. The Workshop Method is a “nominal group process” – meaning that conversation is minimized until the naming and reflection steps. One of the most common facilitator errors is to allow conversation throughout the process. If this is a desire, a different process should be selected. For this reason, the following will provide a generic overview of the process.

The Workshop Method utilizes a planning board made from a large piece (4 foot by 10 foot) of Art Craft paper or construction paper that is sprayed with an adhesive material (3M Spray Mount seems to work the best) and taped or pinned on the wall. You can also use fabric that can be folded and washed, as well as electrostatic film that is now available from certain vendors. These sticky surfaces are used to post and arrange ideas on half sheets or 8 1/2 x 11 paper.

Team members are gathered around the planning board in a semi-circle and are led through a series of five sequential steps that culminate in a finished

product. The nature of the finished product depends on the specific outcomes designed for the exercise. One of the great advantages of the method is that the steps are easy enough to follow that anyone with a very brief orientation can assist the group through the process. Reliance on facilitation is minimal. The five sequential steps are:

1. Setting the Context - Setting the Stage
2. Brainstorming - Generating New Ideas
3. Organizing - Forming New Relationships
4. Naming - Discerning the Consensus
5. Reflection - Confirming the Resolve

Generally speaking, the workshop method is very adaptable to specific applications and to group size. When used with groups of greater than 15-20, the method can be successfully used in stages. As an example, in working with a partnership group of 200 people in Oklahoma, we broke the group of 200 into 20 groups of approximately 10 people each. Each small group ran their own separate workshop as described below. The results of all 20 groups were then synthesized into a single product by the whole group on a large workshop planning board at the front of the meeting room.

Another successful approach is to have the small groups brainstorm ideas specific to the task in their small groups (on large chart pads). Each group is then asked to synthesize their ideas into six to eight key themes. The key themes from each small group are then transferred onto half sheets of 8 1/2 x11 paper using large marking pens. All of the small teams then reconvene as a whole group around one large planning board. Each group (armed with their six to eight key themes) then participates in the Workshop Method as a large group.

Depending on the nature of the task and number of people involved, a workshop can take between 1 1/2 to 3 hours to complete.

## Sequential Steps

### 1. Context - Setting the Stage

Setting the context is extremely important in getting everyone focused on the same issue. Many times the context is established through presentation of data or providing an overview of interview or survey findings. It is during this step that the specific focus of the task is clarified.

### 2. Brainstorming – Generating New Ideas

Generally, a key question is posed to the group by the facilitator to initiate the brainstorming session. The group can develop its own key question. Some examples of possible context-setting questions might include:

- **VISIONING CONTEXT:** “After three years of working with a highly creative and successful project team, what kinds of changes would you see as evidence of success?”
- **IDENTIFYING UNDERLYING CONSTRAINTS CONTEXT:** “What are the most important issues, challenges, barriers or constraints that exist in our organization that might impact our ability to achieve our goals?”
- **STRATEGIC DIRECTION OR ACTION PLANNING CONTEXT:** “Given what we now know about underlying constraints, what might be some of the most strategic actions we could take in order to move us towards achieving our vision?”

#### Action 1: Focus

During this step, the focus is on each individual generating as many ideas as possible in answer to the key question.

#### Action 2: Prioritize

The individual is then asked to prioritize their individual ideas and transfer the most important ideas (three to ten) to half sheets of paper. They are asked to write one idea per page using large marking pens. It is important that the ideas are not one-word answers (e.g. communication), but rather reflect a full thought. This usually requires one, at most two, sentences – not just a noun or verb.

#### Action 3: Clarify

Each individual's top three to five ideas are collected, read aloud and randomly posted on the planning board. Once all the ideas are posted, team members are given the opportunity to ask questions about the posted ideas in order to clarify meaning. No discussion about the merit of ideas is permitted at this stage.

### 3. Organizing – Forming New Relationships

#### Action 1: Link Ideas

In this step, the posted ideas are grouped into categories of like ideas. The

first step is to link ideas that are saying essentially the same thing into pairs and then groups. This is the point in the process that requires the greatest attention by the facilitator. People generally “over-clump”. By over-clumping the process becomes very generalized and the best ideas can be missed. Keep the group focused on “ideas that are saying the same thing.”

### Action 2: New Ideas

Once all the posted ideas are grouped, the facilitator asks group members if they have any ideas on their 1/2 slips of paper that did not yet go up on the board and are different from those already posted. These ideas are read aloud and placed on the board.

### Action 3: Match Ideas

The grouping of ideas continues with the rules for grouping relaxed to allow matching of similar ideas or clusters.

## 4. Naming - Discerning the Consensus

### Action 1: Develop a Naming Label

Naming is a two-step process. The first step of naming is to develop a one to two-word label for each category. This initial labeling assists people in talking about the emerging categories and assures that people move past the two to three word label phase on to the more thoughtful naming step.

### Action 2: Name the Synthesis Statement

The second step of naming tends to be the most challenging step of the entire process. The objective here is for the group to arrive at a synthesis statement for each of the organized categories. It is suggested that the facilitator asks the group to come up with a short statement for each category. The statement should “name” or capture the underlying meaning that the individual ideas have as a collective whole. It is as if the individual ideas are descriptions of something that is bigger or more fundamental than each idea taken singly. It is like the old metaphor of the elephant and its parts. The ideas taken singly might describe the trunk, legs, tusks, etc. The label for the grouping would be “Animal Parts” (the first naming step). The “name” for the category (second step of naming) is what all of these things are together - its underlying meaning or intent – “matriarch elephant leading the herd to safety.” Giving an example from a recent visioning session, the individual ideas and labeled category looked like this:

- *Clean & attractive campus*
- *Flowers and plants everywhere*
- *Clean walkways*
- *Freshly painted buildings*
- *Clean and maintained equipment*
- *Kids and staff gardening together*

### Forming New Relationships

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The name eventually discerned from this cluster was:

*A clean and attractive campus is essential to fostering a place where students and staff want to be & learn.*

### Action 3: Choose the Group

The naming process can be done using the whole group or the task can be broken down into smaller groups. Using the whole group builds a greater sense of cohesion and consensus. It can also be a lengthy process (a couple of hours). If the large group is broken down into smaller task teams, it is suggested that people self-select into the teams - each team takes one or two categories to name. They are then challenged to act as stewards for the entire group when developing the group name (second step of naming - synthesis statement).

### Reflection - Confirming the Resolve

#### Action 1: Discussion

During this step, the group discusses the overriding themes across the whole of the work and the significance of the results to the team itself.

#### Action 2: Encompass the Insights

The group can then develop a statement that encompasses the insights of each of the clusters. An alternative is to have the group create a visual image that reflects the relationships of all the categories. The Imaginization Process can be used in this instance (*see p. 68*).

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### STORY: Personal Action Planning

*I have used this process innumerable times with great success, with teams from six people up to an entire community of 1000 people. One often-overlooked application is in personal action planning.*

*A couple of years ago I needed to spend a couple of days with my wife Joyce to assist my dad in moving from his home to an assisted care living community. At the time, my dad was in the hospital recovering from pneumonia and many issues were in motion. We only had a short amount of time to accomplish many outcomes dealing with the hospital, his house, finding a new place to live, his changing insurance needs, changes in his veteran status, and more.*

*As I was flying down to San Diego from northern California my mind was swamped with all the steps and trying to*

*figure out how to fit these steps over two days. I pulled out a file folder from my briefcase and I had a packet of small sticky notes. I started to quickly fill out the sticky notes, one step or action per sticky note. Before I knew it I had about thirty-five sticky notes posted all over the open file folder. I created a grid on the file folder – the top was divided into the days – Thursday, Friday and Saturday morning. The vertical column was broken down into two-hour increments.*

*Then I arranged all the sticky notes into the grid. Within about 15 minutes, from start to finish, I had a complete action plan. It worked beautifully and I stopped my ruminating and could get on to a more pleasant and peaceful focus of attention.*

<b>CONTEXT</b> Setting the Stage	<b>BRAINSTORM</b> Generating New Ideas	<b>ORGANIZE</b> Forming New Relationships	<b>NAME</b> Discerning the Consensus	<b>REFLECT</b> Confirm the Resolve
<ol style="list-style-type: none"> <li>1. Present information, data, stories to set the context.</li> <li>2. Highlight a focus question.</li> <li>3. Outline process &amp; time line.</li> <li>4. Review the steps.</li> </ol>	<ol style="list-style-type: none"> <li>1. Brainstorm individually.</li> <li>2. Select 3-5 important ideas (adjust to size of group).</li> <li>3. Brainstorm as a group.</li> </ol>	<ol style="list-style-type: none"> <li>1. Form pairs of close matches (4-6).</li> <li>2. Develop clusters.</li> </ol>	<ol style="list-style-type: none"> <li>1. Quickly give each cluster a 1-2 word label.</li> <li>2. Talk through a cluster - What are we saying? What is our insight?</li> <li>3. Capture the specific meaning of the cluster - not a label but a statement.</li> </ol>	<ol style="list-style-type: none"> <li>1. Create design to hold the integration of ideas &amp; themes.</li> <li>2. Discuss significance of product.</li> <li>3. Plan next Steps.</li> </ol> 

### Rational Outcome

This process can be used to develop a vision or mission, identify underlying constraints or tensions, identify key strategies and develop a detailed action plan. It is most useful for strategy development and action planning.

### Experiential Outcome

This process invariably creates the experience that a group is much more aligned around common desires, perceptions or strategies than was previously perceived by the group.

#### WORKSHOP METHOD

