

MEETING TOOLS AND TECHNIQUES

Getting Started		
Method	Summary of steps / hints	Attribution
Icebreaker	Any activity that mixes people up and gets them talking	
Check-in	Go round the group quickly --“name and where you’re coming from”: can ask for a metaphor such as an animal or a weather condition for variety	Howick, The New Compleat Facilitator, p. 35
Create agenda with the group	Ask individuals for agenda items, write on flipchart, ask for priority items, put a star by them, ask what sequence to address them	Doyle and Straus, How to Make meetings Work
Creating the Real Question	Brainstorm the one question we need to deal with today, look for similarities, summarize the underlying question that we all need to deal with	Williams, More than 50 Ways to Build Group Consensus, p. 67
Success Criteria	Ask each person to write down their thoughts in answer to “What needs to happen in this meeting?” or “At the end of this meeting, how will I know it was a success?”. Then follow up with “What needs to occur during this meeting for those outcomes to be met?” Either go round the group and get one thought from each person, or a “pair-share” and have each pair select 2-3 critical outcomes and share with the whole group.	Pell
Playing with the Topic	Put out “toys”. Ask each person to pick a toy and use the toy as a metaphor: “Use this toy to describe the issue we are working on today.”	Beyers
Opening Conversation	Go round -Name and one thing you want from this meeting? Anybody, what surprised you in what someone said? What are similarities in what we said we want? Uniquenesses? How would you summarize what our mandate is for this meeting?	Nelson

MEETING TOOLS AND TECHNIQUES

Sharing Information		
Method	Summary of steps / hints	Attribution
Brainstorming	Ask open-ended question, give time to brainstorm answers individually, then in group (may share ideas in pairs or threes as a middle step). Write answers on flipchart, or have small groups write them on cards or stickies	Doyle and Straus, p.231 Williams p. 209
Make a presentation	Present ideas logically, use visuals to illustrate when possible. Summarize with overheads, but do not spell out presentation verbatim	Doyle and Straus, p. 259
Reports	Suggest structure and time limit in advance: encourage use of visuals	Kaner, Facilitator's Guide to Participatory Decision-Making, p. 71
Knowledge gathering	Start with what is known (data and experiences). Think together about what else needs to be known and why.	Wilson, The Facilitative Way, p. 167
Journey Wall or Historical Scan	On large wall timeline, brainstorm and put up events/accomplishments from the past in time blocks, reflect to process high and low points, turning points, "chapter" titles, name the whole. Reflect to extract learnings, trends	Williams, p. 45
Round-robin on facts	Go around the group quickly, each person naming one fact they've observed about the situation	Nelson
Individual writing	Detailed instructions, say whether it will be shared with group, time limit. Give 1-minute warning for time up, then share what willing to share, discuss as a group	Kaner, p. 77
Structured go-around	Ask a specific open-ended question, suggest time limit, have each person answer the question in turn without interruption	Kaner, p. 79
Sharing Visions	Post questions that evoke visions of final outcomes. Individuals write down their own responses, then share with partners. They repeat the process with new partners several times, incorporating any good ideas they hear. Finish with a discussion to pull the ideas together	Bens, Facilitating with Ease, p.150

MEETING TOOLS AND TECHNIQUES

Processing and Thinking Through

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Open discussion	Open the topic, let the group talk. Facilitator often recognizes each person as they signal their readiness to speak. Intervene when necessary to keep things moving, ensure focus, keep ground rules observed.	Doyle and Straus
Circle Discussion (also known as Go around, Round Robin, Talking Stick)	Introduce question or topic. Go around the group, soliciting ideas from each person in turn. Can go around the group several times.	
Classic Debate	Pose a provocative question with two sides, first position is declared and explained, then the second position is declared and explained. Then each position gives a rebuttal to the other position. Vote.	
Robert's Rules of Order	A formal resolution or motion is proposed. Open discussion or debate. Vote to adopt or reject, either as proposed or with amendments.	
Focused Conversation Method	Set a context, ask open-ended questions that draw out, in sequence, objective data, reflective responses and reactions, interpretations, and decisions.	Stanfield, The Art of Focused Conversation
Sequential Questioning	Analyse the topic and create a list of probing questions working from macro to micro issues. Ask questions one at a time, recording answers. May have challenging statements, ask participants to agree or disagree, then explain their response, one at a time.	Bens, p. 151
Questioning Process	Ask 3 types of questions in order: "What" or observation questions, "So What" or meaning questions, "Now What" or application questions.	Strachan, Questions that Work
Analyzing	Begin with questions of clarification. Ask people to share strengths they see and explore why they are strengths. Repeat for weaknesses and concerns	Wilson, p. 167
Gap Analysis	Identify the future state, then the present state and post on the wall. Brainstorm the "gaps" and post between the "present" and the "future". Have small groups problem-solve how to deal with the gaps. Share in large group	Bens, p. 157
V-R-C Process	Brainstorm (write on charts) Vision: What needs to happen; Reality: What has to change; then looking at both of these, Critical Choice: What strategic actions can we take?	Wilson p. 133
Consensus Workshop Method	Ask a focus question, each person brainstorms answers, write answers on cards or flipchart, cluster ideas to answer the focus question, name results, reflect and resolve	Stanfield, The Workshop Book
Problem-solving, Systematic Problem-Solving	Identify problem, establish criteria for evaluating solutions, identify root causes, generate alternative solutions, evaluate and select a solution, develop an action plan, implement and evaluate	Schwartz, The Skilled Facilitator, p. 159;

MEETING TOOLS AND TECHNIQUES

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		Bens, 168
Cause and Effect Charting	Clarify differences between “cause” and “effect”. Brainstorm causes and effects in two separate columns. Probe each item in the “effect” column to determine what causes it. Continue until all causes are identified.	Bens, p. 159
Fishbone Diagram	Draw a “fishbone” on chart paper. Write the observed effect on the “head” of the fishbone. Determine the major cause categories and write them on the “ribs” of the fishbone, then brainstorm all the possible causes on each “rib”.	Bens, p. 159
Defining the problem	Use one or more of the following: State problem as a question. State problem as given, then get statements of how others understand the problem. Clarify key words to tighten the problem description. Brainstorm problem descriptions under two columns: “Is” and “Is Not”. Use diagrams to describe problem. Break down into component parts.	Doyle and Straus, pp. 222-225
Reframing problems	Brainstorm elements of the problem under one column: “Presenting Problem”. Then in a second column, “Reframe”, state each element in a different way	Kaner, p. 196
Force-field Analysis	Write the problem on a flipchart. On the left, list under the heading “sustaining forces”, list all the things that support the problem and keep it going. On the right, under the heading “restraining forces”, list all the things that restrict and restrain the problem. Then ask what to do to change the forces. May prioritize barriers or strategies.	Doyle and Straus, 227, from NTL
Variations on Force-field Analysis	Forces that help us vs. Forces that Hinder Us, Pros and Cons, Things we do well and Things we could do better, Hopes and Fears, Best case scenario and Worst case scenario, Assets and Liabilities, Positives and Weaknesses, Strengths and Weaknesses, Opportunities and obstacles	Bens, p. 156
Problem solving	Have people share what is known and unknown, questions and concerns. Ask what all this means for what is needed next.	Wilson, p. 167
Best, Worst, Most Probable	List the consequences of solving and not solving a problem in six columns: What is the best consequence of solving / not solving this problem? The worst consequence? Most probable?	Doyle and Straus, p. 220
Specifying Requirements	Small groups/dyads brainstorm in 2 columns: Requirements and Necessary Conditions for a solution, and Topics for Further Discussion. Report and record on flipchart, prioritize key conditions	Kaner, p. 156
Discussion of a model	A model, plan or solution is introduced, presented and clarified. The group discusses its merits and may refine or adapt it. The group adopts the model, rejects, it, modifies it, or sends it to a group for refinement.	
Blue-sky thinking	Ask for free-form thinking in which every crazy idea, option and possibility is welcome. Add new ideas or build on one already shared.	Wilson, p. 167
“What if” thinking	Begin with one possible scenario and create several more. For each assumption, ask “What if?”	Wilson, p. 167

MEETING TOOLS AND TECHNIQUES

Processing and Thinking Through		
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	and explore what would happen if the assumption was different.	
Sharing insights	Get data and information in front of the group. If there is a lot of data, consider clustering the data into common themes. Facilitate a conversation to uncover insights.	Wilson, p. 167
Creating strategy	First identify the blocks to getting done what is needed, then brainstorm strategies that work on removing the blocks.	Wilson, p. 167
Small group work – drawing a vision	Divide into twos or threes, each small group talks through its vision, and draws it on chart paper, then all groups share with the whole.	Williams, p. 10
Small group work – simultaneous committees	Groups of two or more are given a portion of the task to create a plan of action, then report back to the group	Kaner, p. 83
Model building	Identify together the constraints or values each model must consider. Ask people to work in small teams to create an image or plan of what is needed, including elements, steps, timeframes, people involved, etc.	Wilson, p. 167
Gallery Tour or Walk	Post flipchart work of small groups in separate parts of the room. Form cross-section “tour groups” and walk around, visiting each station for a few minutes. Get explanations, make suggestions	Kaner, p. 83
Three to One Scenarios	Brainstorm constraints/values to be held for a solution. Divide into 3 small groups, who each come up with a possible scenario of a solution that satisfies the constraints. Report to whole group. Process similarities, differences, implications of scenarios. Merge together to one winning solution.	Williams, p. 107
Making Differences Visible	Draw 3-4 large intersecting circles. Put elements of each perspective in the main part of a circle, using nonjudgmental language. Name points of connection between circles and write in the intersections. Reflect	Williams, p. 213
Cut up and Move Around	Put elements of a solution on cards and move around visually on the wall to see new relationships	Doyle and Straus, p. 236
Creative Thinking-Rolestorming	Brainstorm answers from the perspective of a character not in the room to come up with new perspectives and insights	Kaner, p. 163
Creative Thinking – Analogies	Generate a list of situations or actions analogous but unrelated to the problem, describe analogy in detail, consider each analogy in relation to the original problem to come up with new perspectives	Kaner, p. 163
Checkerboard or Matrix, or Decision Grid	Draw a checkerboard or matrix. Write one set of variables across the top, one per box. Write another set of variables down the side, one per box. Brainstorm in the intersecting boxes. Can put “options” on one axis, “criteria” on the other and rate each option for each criteria. Can put “impact” on one axis, “effort” on the other, or “strategic impact/importance” on one axis and “likelihood of success” on the other.	Doyle and Straus, p. 235; Bens 160-1
Positive, Concerns,	Write an idea on a flipchart page. Brainstorm responses to the idea into 3 columns: Positive (What	Scarce, 100

MEETING TOOLS AND TECHNIQUES

Processing and Thinking Through

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Interesting	strikes you as positive about this idea?), Concerns (What concerns you about this idea?), Interesting (What is interesting about this idea). Discuss after the brainstorm is complete.	Ways to Build Teams, p. 100
Advantages and disadvantages	List advantages and disadvantages of each solution on flipchart. Discuss to weigh up the best solution.	Doyle and Straus, p. 242

MEETING TOOLS AND TECHNIQUES

Bringing to Conclusion		
Method	Summary of steps	Attribution
Mapping Road to Agreement	Ask group to state current points of agreement. Help group name current unsettled points. Brainstorm key points to settle. Choose teams to deal with issues and build model for agreement.	Williams, p. 113
Agreement: State and Restate	Every few minutes, restate where they are in the flow toward agreement – agreement and not agreement. Use visuals as well as voice.	Williams, p. 116
Inclusive Principles	Write opposing solutions in outside parts of overlapping circles. Ask: How can we do both? Write in overlapping part.	Kaner, p. 187
Prioritize lists	Use one of the following: Item by item voting. Person by person go-round. Dots. Secret ballot (write choice on paper and send up)	Kaner, p. 111
Dots	Give each person a small number of sticky dots. They walk up to the front and put on their priority item(s). Can be used with the Focused Conversation method: i.e. red dot = one you're most passionate about, yellow=easiest to dot, green= costs least, blue=most impact. Reflect what the pattern tells you about the group's consensus.	Williams, p. 73 Bens, 158 Nelson
Multi-voting	Number items. Using dots, "points", or show of hands, each person votes for at least 1/3 of the items on the list. Tally votes. Cross out items receiving the fewest number of votes. Repeat until 7 or fewer items remain. Discuss or use another method to pick one item.	Bens, 158; Howick, p. 60
Polling	Ask, "If we had to decide right now, given what we know, what is your current thinking?" Go around the group and get short answers.	Nelson
Straw Voting	Get a show of hands for who would support a suggested solution. Follow up if necessary with one of the other steps.	Doyle and Straus, p. 246
Build Up	After generating a list of alternatives, ask someone to name one that might work. Ask "Is there anyone who could NOT live with this one?" If there is anyone who cannot, ask for changes that could help everyone live with it.	Doyle and Straus, p. 245
Eliminate	Ask, "Is there any alternative you know for sure you CAN'T live with?" If there is an answer, focus on the others.	Doyle and Straus, p. 246
What /Who/ When	Write actions on cards or flipchart. Include who will do each action and when. Reflect with group.	Williams, p. 126
Critical Path	Brainstorm actions on cards, put in sequence or flow chart showing sequence and relationships	Doyle and Straus, p. 250
Timelining Actions	Put up a visual timeline on the wall. Write actions on cards, put in appropriate week or month column. Adjust to coordinate actions.	Williams p. 129, Wilson p. 130
Quick-Check-Why	With all options visible, go round and ask each person to state their preferred choice at this point in time. No reasons or discussion. Mark the choices. Then do a second round asking each person to	Howick, p. 62-3

MEETING TOOLS AND TECHNIQUES

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	explain their choice. Only questions of clarification are allowed. Repeat both rounds until a consensus is reached.	
Troubleshooting	After action plans are made, take a critical look at what might impede the planned activities, then plan strategies and actions to deal with each one	Bens, 162
Needs and Offers Negotiation	Each party thinks individually about 1. what I/we need from each other to be effective, and 2. What I/we offer to the others to meet their needs. Each presents uninterrupted to the group, then the group discusses them. Work out action steps and summarize commitments and action steps.	Bens, p. 167

MEETING TOOLS AND TECHNIQUES

Closing		
Method	Summary of steps	Attribution
News Spot	At end of planning session, small groups create a 3 minute “TV News Spot” to report on the successful completion of project, present to whole team. Reflect on impact of project.	Williams, p. 79
Content Processing	Guide the group through a reflection on the product/ accomplishments of the meeting. Can use the Focused Conversation Method.	Stanfield, p. 59; Williams, p. 220
Meeting Processing	Guide the group through a reflection on the experience of the meeting. Can use the Focused Conversation Method.	Stanfield, p. 55, 57; Williams, p. 222
Personal Commitment	Ask each person to find a piece of paper they will see later and write down their personal commitment to following through on the meeting: i.e. finish the sentence “I will....”	Nelson

MEETING TOOLS AND TECHNIQUES

Sources of Methods and Techniques in this Document

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