
THE GATHERING GUIDE: AN EVALUATION ENGAGEMENT RESOURCE

“HOW CAN DATA-INFORMED DECISION MAKING CREATE A BETTER TOMORROW?”
THAT’S THE *BIG QUESTION* AND WE BELIEVE THAT YOU HAVE THE ANSWER



Developed by the Gathering Guidance Working Group of the American Evaluation Association

INTRODUCTION

Recently, we at the American Evaluation Association (AEA) have pondered the question, “How can data-informed decision making create a better tomorrow?” That is the *big question* and we believe that you have the answer.

The question draws on our history as a helping profession and reflects the continuing mission of evaluators to improve organizations, systems, communities, and the world in which we live and work. Today, we want to harness the collective wisdom of evaluators, evaluation users, stakeholders, and the broader publics we serve, to collectively create a better future through data-informed decision making.

Organizational communication is at the heart of evaluation capacity building. Part of that communication involves the evaluator playing such roles as facilitator, trainer, and teacher. These roles are not limited to evaluation principles and skill sets, but also extend to organizational development, policy and operational settings, corporate evaluation cultures, and knowledge management systems. Improving our skills as discussion facilitators, and exploring new ways of gathering people and collecting information, adds new tools to the evaluator’s toolbox.

While the importance of evaluation cannot be overstated, of equal importance is spreading the word about evaluation through many different mediums. This Gathering Guide will provide you with the information you need to bring together those in your sphere of influence, to engage in a meaty discussion of the importance to the field and to our communities and to experience different ways of gathering, and to share what you learn in order to contribute to creating the better tomorrow we seek today.

As an organization dedicated to evaluation teaching and learning, AEA has created this Gathering Guide to help evaluators and organizations improve their world by:

- Examining the benefits of making data-informed decisions
- Expanding our understanding of ways of gathering and learning, both for learning about evaluation and to leverage as strategies to employ in an evaluation
- Discovering new ways to encourage discussion with organizations about evaluation
- Increasing evaluation capacity building by fostering internal and external conversations about evaluation
- Creating and sharing evaluation resources
- Contributing their lessons learned to inform a plan for creating a better tomorrow through data-informed decision making



HOW CAN DATA-INFORMED
DECISION MAKING CREATE A
BETTER TOMORROW?

GUIDING QUESTIONS

As you engage those in your sphere of influence, it will likely be helpful to have some conversation starters ready. The key conceptual guiding questions with which to start is: **How can data-informed decision making create a better tomorrow?**

From there, the direction the discussion takes will depend on the group, the format, and the context. Here are a number of ideas for options to explore further:

- What would a better data-informed tomorrow look like?
- What might an ideal future of evaluation look like in 10 years and how do we get there?
- What people, strategies, or resources do you have or know about that might contribute to this vision?
- What success stories of data-informed decision making improve organizations and communities can you share?
- What are the key lessons learned from these successes?
- How do we leverage the power of the public and stakeholders to demand better outcomes through data-informed decisions?
- What might make data-informed decision making easier or more productive? What might stand in the way?

Consider ending the gathering with the following “What do you think of the type of gathering we had today for gathering community input? What would you recommend to improve it?”

Below, we have included possible guiding questions and topics for a number of the gathering formats.

A SUGGESTED GUIDING TOPIC FOR FUTURE SEARCH

Balancing the need for public accountability with program adaptation and development

A SUGGESTED GUIDING QUESTION FOR OPEN SPACE TECHNOLOGY

Using data-informed decision making to create a better tomorrow...what are our Challenges, Opportunities, and Possibilities?

A SUGGESTED OPENING QUESTION FOR WISDOM COUNCILS

What would you like to talk about regarding data-informed decision making that creates a better tomorrow?

SUGGESTED GUIDING QUESTIONS FOR WORLD CAFÉ

Round 1: Who are you, and why are you here? What success stories of data-informed decision making improving organizations and communities can you share? What are the key lessons learned from these stories?

Round 2 (Share and Connect: “Successes” & “Lessons Learned”): If we leveraged our Lessons Learned, what would a better data-informed tomorrow look like? What opportunities, people, strategies, or resources can be harnessed today to create this “tomorrow”?

Round 3 (Share & Connect: “Tomorrows” & “Opportunities”): How do we leverage the power of the public and stakeholders to demand better outcomes through data-informed decisions? What can we do now to create a better tomorrow using data-informed decision making?

Harvest: How can we ensure data-informed decision making creates a better tomorrow?

IMPLEMENTATION

THE PURPOSE OF THIS GATHERING GUIDE IS THREEFOLD:

1. To solicit responses to the overall question regarding data-informed decision making.
2. To offer strategies for community and stakeholder engagement within and among organizations.
3. To provide a venue for group learning through the submission of success stories, tips, and resources regarding your own experiences with facilitating evaluation conversations.

THE AEA GATHERING GUIDE WIKI

To encourage the sharing of what you have learned about data informed decision making and alternative group engagement methodologies, AEA has created an online space for evaluators to share additional techniques, resources, success stories, and lessons learned as they conduct engagement activities in their respective areas of focus. The wiki is an online space, curated and created by its readers, that is designed to be a dynamic, living document.

FIVE STEPS TO GETTING INVOLVED

- (1) Select an option from the [Ways to Gather](#) section of this guide
- (2) Identify who is to facilitate using the [Selecting a Facilitator](#) guidance and [Facilitator Selection Checklist](#)
- (3) If the gathering is to be public, post it on the [Gathering Guide Wiki](#) to encourage attendance
- (4) Identify a recorder/reporter for the gathering, who will take notes
- (5) Use the [Guiding Questions](#) to engage the attendees at your gathering
- (6) Address one, the other, or both of the following two items to tell the story of your gathering via the wiki:
 - o What did you learn about the big question? What ideas emerged from your discussion?
 - o What did you learn about the type of gathering that you held? What recommendations do you have for others using this form of community engagement?

WAYS TO GATHER

The following pages contain examples of group engagement techniques. The suggestions we use here are by no means exhaustive, but merely serve as a springboard for further ideas. The techniques are common to many organizational development settings, and can be adapted to accommodate groups of various sizes and compositions.

- (1) [Bohmian Dialogue](#)
- (2) [Brown Bag Lunch](#)
- (3) [Future Search](#)
- (4) [Open Space Technology](#)
- (5) [21st Century Town Meeting](#)
- (6) [Unconference](#)
- (7) [Wisdom Councils](#)
- (8) [World Café](#)

WHERE CAN I LEARN MORE?

[Resource Guide on Public Engagement](#) from the National Coalition for Dialogue & Deliberation provides core principles for public engagement, resources, more in-depth descriptions of ways to gather, and a framework.

[PeopleandParticipation.net](#) provides descriptions of a range of different participation methods including the uses, strengths and weaknesses, costs, time requirements, and relevant resources.

SELECTING A FACILITATOR

A key consideration in planning for any kind of group engagement process is to select an appropriate and effective facilitator. The concept of “facilitator” can be defined in several ways:

- Someone who helps a group of people understand their common objectives and assists them to plan to achieve them without taking a particular position in the discussion. (Wikipedia)ⁱ
- One who helps to bring about an outcome (as learning, productivity, or communication) by providing indirect or unobtrusive assistance, guidance, or supervision (Mirriam Webster)ⁱⁱ
- One who contributes structure and process to interactions so groups are able to function effectively and make high-quality decisions. A helper and enabler whose goal is to support others as they achieve exceptional performance" (Bens)ⁱⁱⁱ



WHO SHOULD FACILITATE THE MEETING OR EVENT?

Use an internal facilitator:

- Where the agency has a good reputation and relationship with the community
- When it is important for the agency to take a prominent role
- Where there is low potential for conflict within the group
- Where the internal facilitator is highly skilled

Use an external facilitator:

- When it is important that the facilitator is independent of the key stakeholders or issue
- Where there is some conflict involved that is not best managed internally
- Where you need a highly skilled facilitator and do not have access to one internally
- When you need a facilitator with particular appeal to certain community groups

Use multiple facilitators:

- Where partnerships are important and key roles should be shared among stakeholders
- Where different facilitators are likely to be more effective during different phases of an event
- When there are many participants or subgroups and multiple facilitators are required

CHOOSING AN EFFECTIVE FACILITATOR

Choosing the right facilitator(s) for a group engagement event involves several key steps:

1. Identifying the goals of the event
2. Identifying the key stakeholders
3. Once you have clearly identified what you are looking for, the following checklist can help guide the process of learning as much as you can about the background, skills, experience and talents of potential facilitators to find a good match.

FACILITATOR SELECTION CHECKLIST

- Is the person a professional meeting facilitator?** Meeting facilitation is a specialized skill. A professional should be able to describe extensive experience conducting similar events, references from previous similar clients, and professional training and/or certification.
- Does the person work hard to understand the purpose of your meeting?** If you talk to someone who seems too quick to accept your project, be cautious. A skilled facilitator will ask many questions to understand what you want to do before agreeing to help you. This helps identify if your meeting fits the facilitator's expertise — some types of meetings may not. And it determines the amount of effort required. Be cautious of facilitators who focus on how they can help you, before they understand your needs.
- Does the person offer strategies for making the process interactive?** Your facilitator should be able to describe techniques to get groups interacting right away, keeping focus and avoiding side issues.
- Does the person apply a variety of process tools?** Each meeting is different. And thus each meeting requires different process tools to obtain useful results. Some people use one process for everything. While that can work in some cases, it is a significant limitation.
- Does the person's style fit with the goals of the meeting and the expectations of the key players?** The facilitator should be able to describe his or her style of facilitation. Different facilitators practice their craft in different ways, although some facilitators can change their style to suit the parties' specific needs. What goals or values does the facilitator emphasize? Look for personality and charisma.
- Does the person provide suggestions on how to run your meeting?** Skilled facilitators take care of details, including how to set up the room and what resources will be needed. They also coach you on how to maximize the effectiveness of your participation.
- Does the person pay attention?** An effective facilitator will pay careful attention to you while you talk. This is an essential skill in attending to the dynamics that occur during a meeting.
- Does the person think well on his/her feet?** Effective facilitation requires someone who is very sharp and a quick thinker, especially for an unconventional gathering event.
- Does the person charge a realistic fee?** A facilitator's fee provides important information about the person. Most professional facilitators charge realistic fees that are consistent with the value of their work. Those who have published books may charge more because they bring an added level of confidence to their work. People with little experience will charge low fees. A low fee is not a bargain, it's a warning.

WHERE CAN I LEARN MORE?

[Key Questions When Choosing a Facilitator](#) Leadership Strategies, Inc. provides a National Facilitator Database for locating a facilitator and provides suggested questions to ask when choosing a facilitator.

The [International Association of Facilitators](#) offers a certification program that includes both core competencies and a commitment to the association's code of ethics. Their website provides a directory of members.

The [National Meeting Facilitator Database](#) lets you access detailed information about facilitators located around the country — their skills, areas of expertise, past clients, projects, certifications and billing rates.

[Find a Facilitator](#) is an online service that helps you locate a professional facilitator by identifying the specific needs of the event.

21ST CENTURY TOWN MEETING

The 21st Century Town Meeting Methodology was developed by the nonprofit organization AmericaSpeaks in 1997. 21st Century Town Meetings involve a large number of citizens (between 500 and 5,000) in deliberating on local, regional or national issues and make use of modern technology, including wireless voting pads and networked laptops. They combine the benefits of small scale face-to-face discussions with those of large group decision making.

WHAT DOES IT LOOK LIKE?

The day begins with a welcome from sponsors and brief opening comments from key political leaders. Participants answer demographic questions using keypad polling, both to get oriented to the technology and to find out who is in the room.

A preliminary values-based discussion allows participants to learn what is important to them regarding the issues at hand. The identified values lay the foundation for the next 4-5 hours of discussion. In each segment of the agenda, discussion begins at tables of 10-12, working with an independent facilitator who uses a networked computer to collate ideas and votes from the table. This information is sent to a central theme team that distills comments from all tables into themes to present back to the room for comment or votes. Each participant has an electronic keypad which allows for voting on themes or questions. The voting results (often involving thousands) are presented in real time on large screens for instant feedback.

A report summarizing the day's outcomes is quickly developed, often including details on the group's demographics. It is then reproduced and distributed to participants, sponsors, and officials as they leave. Because decision makers have participated in the event and agreed to act on the recommendations in some way, the meeting often has a lasting impact.

WHEN SHOULD THIS FORMAT BE USED?

A 21st Century Town Meeting can deliver clear recommendations, data on group opinions before and after deliberation, constructive discussion, and an event that captures the imagination of the media and public. It can be useful when:

- The process can make an impact on an issue;
- You want to engage a large number of people in the discussion; and
- You have sufficient resources to manage a large-scale event.

21st Century Town Meetings are probably not the best format to use if:

- The issue is not sufficiently well developed or "ripe" to have a significant impact on current decision-making;
- You or the sponsoring organization lacks credibility with the community or decision-makers; or
- You are unable to attract a sufficiently diverse group of participants including commonly marginalized groups.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Space: A large room with space for breakout groups
- People:
 - Experienced small-group facilitators with the confidence to work in an intensive day-long program
 - Theme team members to read ideas generated at the tables and distill the comments into key themes
 - Issue experts to answer participants' substantive questions
 - Constituency service representatives from agencies to answer questions not pertinent to the day's agenda
- Technology: Computer network with polling software and individual electronic keypads for participants
- Other: Food or access to food

WHERE CAN I LEARN MORE?

[America Speaks](#) 21st Century Town Meeting is trademarked by the nonprofit organization AmericaSpeaks.

[Taking Democracy to Scale: Creating a Town Hall Meeting for the Twenty-First Century](#) This guide provides the theoretical framework for this approach along with a detailed case study of its use in a real situation.

[21st Century Town Meeting](#) PeopleandParticipation.net provides descriptions of a range of different participation methods including the uses, strengths and weaknesses, costs, time requirements, and relevant resources.

BOHMIAN DIALOG

Bohmian Dialog is a free-flowing approach to group interaction designed to explore the roots of problems facing society. A key concept of Bohmian dialog is that it is done without an agenda or goals. The group agrees not to make group level decisions as part of the dialog. The purpose of such a dialog is to create a “free space” in which to explore not only the topic of discussion but the assumptions underlying participants’ views. Participants endeavor, during the process, to pay attention to and reflect on the thoughts, reactions and judgments that occur to them during the discussion. During the dialog, “each listener is able to reflect back to each speaker, and to the rest of the group, a view of some of the assumptions and unspoken implications of what is being expressed along with what is being avoided.” (Bohm, Factor and Garret, 1991)

WHAT DOES IT LOOK LIKE?

Bohmian dialog is an unstructured group conversation, during which participants share the thoughts and reflections they have as freely as possible. To promote interaction, participants sit in a circle, and there is no designated leader. An experienced facilitator may be useful to help the group be aware of potential sticking points and to maintain the process as a “dialog” rather than becoming a discussion, debate or argument. Bohemian Dialog follows the following principals^{iv}:

- 1. The group agrees that no group-level decisions will be made in the conversation.* It is agreed not to make decisions, but rather to be free and open to new ideas.
- 2. Each individual agrees to suspend judgment in the conversation.* If the individual hears an idea he doesn't like, he does not attack that idea.
- 3. As these individuals "suspend judgment" they also simultaneously are as honest and transparent as possible.* Specifically, if the individual has a "good idea" that he might otherwise hold back from the group because it is too controversial, he will share that idea in this conversation.
- 4. Individuals in the conversation try to build on other individuals' ideas in the conversation.* The group often comes up with ideas that are far beyond what any of the individuals thought possible before the conversation began.

WHEN SHOULD THIS FORMAT BE USED?

Bohmian dialog works best with groups of 20-40, and may work best in sessions of about two hours in duration. If there are too few participants, the group may lack diversity needed for a dialog, while with too many, the process becomes unwieldy. Multiple sessions with the same core group can continue on a regular (e.g. weekly, monthly) basis, as the group desires. New members may attend and old members may leave as they wish and there is no obligation to continue for any set number of meetings. Although a group may begin with a general topic, no topics or subtopics are either excluded or mandated. In general, this format should be used when exploration of an issue or issues is desired, rather than specific actions or outcomes. As such, it may be helpful as an initial step in a larger process, or as a group reflection process at any point.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Space: A room large enough to accommodate 20 to 40 participants sitting in a circle
- People: A facilitator who is willing to guide the process (not subject matter), participants willing to engage in dialog, self reflection and suspension of judgment.

WHERE CAN I LEARN MORE?

[Dialog: A proposal](#) by David Bohm, Donald Factor and Peter Garrett discusses the principals and process of Bohmian Dialog [Bohm Dialog](#) on Wikipedia provides an overview of the process and several related techniques.

[The Co-Intelligence Institute Web page](#) offers a discussion on the distinguishing factors of Dialog and some approaches.

BROWN BAG LUNCH

We're using the term 'brown bag lunch' to cover any gathering that brings together people over a meal to discuss common interests. A brown bag lunch is whatever you make of it. We wanted to be sure to include one way of gathering that is flexible and implementable on short notice and with whatever level of expertise the convener brings to the table. A brown bag lunch may be as informal or formal as you like. A brown bag lunch gathering demonstrates intentionality to come, to connect, and to learn from and with those who attend.

WHAT DOES IT LOOK LIKE?

Brown bag lunches are often convened in the workplace, usually with relatively small groups. They are opportunities to talk and share. In a true 'brown bag' lunch, attendees bring their own lunch (traditionally in a brown bag). They may have heard about the gathering from an announcement posted on a bulletin board or an email sent out to a discussion list.

A brown bag lunch may not even be lunch, and it may not even involve bringing your own meal. Again, we're using this as a placeholder to remind you that you can convene with friends and colleagues to share expertise, concerns, and ideas. You don't need a big budget or professional facilitation, when the group is small and the purpose collaborative discussion, coming together over a meal may be the perfect option.



Our illustration here is from a gathering of evaluators, a number of whom did not know one-another before the meal, over dinner in San Francisco. The group meeting was arranged via email when out-of-town colleagues were to be in town for a conference, bringing a range of people with a common interest together for the group.

WHEN SHOULD THIS FORMAT BE USED?

Informal gatherings are appropriate when those in attendance are seeking a way to share and meet, but not necessarily achieve a common goal. They are excellent for building networks and gaining an understanding of individual issues and concerns. They are not appropriate when important decisions must be made.

Informal gatherings may be convened in concert with other gathering strategies to allow colleagues, even in high stakes settings, to have the opportunity to connect on a more human level and to understand perspectives.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Space: A room large enough for the group, or a restaurant
- People: Anyone who shares a common interest in the topic at hand
- Other: Food, or bring your own

FUTURE SEARCH

Future Search (FS) was developed by Marvin Weisbord and Sandra Janoff as a method for finding common ground for action in organizations or communities. A Future Search Conference is a formal 2-1/2 day gathering for laying the groundwork for productive action on an issue that is often controversial or which has many viewpoints. Participants are identified from all the stakeholder groups that make up the ‘whole system’ of the organization or community. Experienced Future Search facilitators lead participants through the process of exploring the past, present, and future of the issue under consideration.

WHAT DOES IT LOOK LIKE?

Planning: The FS planning committee selects a topic, chooses an engaging title, invites stakeholders (8 participants in each of 8 “themed” groups for a total of 64, for example), and logistics.

Convening—Day 1: Participants mix with stakeholders from other stakeholder groups to look at personal, global, and community-level trends over a period of “x” years. This task quickly builds community as people experience the world through other’s eyes. The groups then review external trends that are shaping the issue, and create a mind map.

Convening—Day 2: FS continues with a review and participant confirmation of the trends identified the day before. Participants are then organized into “stakeholder groups,” with each group identifying important trends and reporting out to the whole conference what they are currently doing and what they want to do in the future. Each group also makes a list of “prouds” and “sorries” connected to their current work on the issue. In the afternoon, participants return to mixed groups to prepare ideal future scenarios. These aspirations are then acted out using creative vignettes followed by the whole group noting common future themes, potential projects, and what they see as “not agreed” (disagreements that may remain).

Convening—Day 3: The first item for Day 3 is to confirm common ground and “not agreed” items. This task explores the tension between ideal and actual. Participants must then decide whether to replay conflicts or to work on common ground to decide next steps. In moving forward on common ground, stakeholder or self-selected groups make short- and long-term action plans for implementing their ideal future. *Re-Convening:* Participants are responsible for following through with action plans. Periodic review meetings, newsletters, and websites are all tools that have been used successfully for moving forward.



WHEN SHOULD THIS FORMAT BE USED?

A Future Search is usually convened when there is a controversial or complicated issue in an organization or community and the establishment of common ground is needed for moving forward and creating change.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Meeting Space: A large plenary room that can accommodate all participants together and in smaller breakouts
- Writing Space: At least one wall is needed for hanging large sheets of blank paper for recording participant input; for breakouts, an easel for each group with writing paper and colored markers are also needed.
- People: Two Future Search facilitators, balanced participation across stakeholder groups, and staff to handle logistics, such as sign-in sheets and food service (three catered lunches plus snacks and drinks).

WHERE CAN I LEARN MORE?

[Welcome to Future Search](#) is the Future Search website; winner Organizational Development Network “2011 Outstanding Global Work Award”

See [Future Search Books & Videos](#), Including *Future Search: An Action Guide to Finding Common Ground in Organizations & Communities* by Marvin Weisbord and Sandra Janoff.

OPEN SPACE TECHNOLOGY

Open space technology (OST) is a way to engage people of all types in creative interaction and thinking that leads to exceptional results. A diverse group of people participate who are passionate about the complex issues at hand. An OST meeting may appear unstructured yet it has a deep underlying set of principles that fits the people and issue(s) at hand.

WHAT DOES IT LOOK LIKE?

An OST may last from a few hours to 2-3 days and may occur intermittently across an extended period of time or be concentrated in a short period of time. Those in attendance have received an invitation by email, letter or other means and have had some time to think about the issue. The invitation ensures that all share a common interest.

Creating an agenda: A typical OST event would begin with chairs configured in a circle with an open area in the middle. If the group is large, concentric circles would be used. The configuration is designed so everyone can hear each other. The center of the circle is open with no podium or table. A few sheets of paper and markers are likely to be on the floor in the middle. The facilitator puts forth the key question or issue that has brought everyone together. On one wall is a banner that says "marketplace" or a similar title. The space under it is blank. The facilitator invites people who have a topic within the larger frame of the key issue, to come to the center and write it on a sheet of paper using the markers. Each person then says what the topic is and posts it in the marketplace. The marketplace becomes the agenda. The one who posted the issue/question becomes the convenor for the breakout group around this topic.

Breakouts: Attendees review the agenda, and proceed to the topic of their choice. Breakout rooms/areas are arranged with chairs in circles with flipcharts or whiteboards for idea sharing. The convenor is responsible for initiating conversation on the topic being addressed and ensures that he/she or someone else records key learnings, ideas, and next steps in regard to the convening issue and issues raised in the breakout. The event facilitator will have created a process ahead of time to collect and compile all the breakout session notes and then disseminate them to participants.

Re-convening: The whole group reconvenes either electronically or in person near the end of the process.

WHEN SHOULD THIS FORMAT BE USED?

OST meetings are appropriate when the conveners and those in attendance are comfortable with a fairly high degree of uncertainty and when creative ways of thinking about an issue are needed. It can involve a relatively small number of people (e.g., 30) or 1000 or more. The approach is based on Four Principles: "Whoever comes is the right people"; "Whenever it starts is the right time"; "Whatever happens is the only thing that could have"; "When it's over, it's over". The principles together say "work hard, pay attention, but be prepared to be surprised!" The one law is The Law of Two Feet. Use your two feet to go where you need to go to contribute and learn the most.

What are the minimum resources needed?

- Space: A plenary room appropriate for the group size and smaller breakout spaces that accommodate circle seating
- Large wall or board for posting the agenda topics (the marketplace) and for posting breakouts' notes
- People: Event facilitator, and a group with a shared passion for the issue
- AV: Flipcharts for stating the event theme or questions, markers and paper for Topic Creation, Note-taking forms and pens for Breakouts

WHERE CAN I LEARN MORE?

[A Brief User's Guide to Open Space Technology](#) from Harrison Owen lays the groundwork for planning and facilitating www.openspaceworld.org provides descriptions and links to many other sources.

UNCONFERENCE

Unconferences are one to three day gatherings where those in attendance set the agenda in real time, driven by a topic or question shared via an advance open invitation from the conveners. While they take many forms, most leverage a version of “[open space technology](#)” which isn’t actually a technology at all, but rather a framework for meeting. A key concept at unconferences is that every person there is an active participant. The one ‘law’ is the law of two feet: “If at any time during our time together you find yourself in any situation where you are neither learning nor contributing, use your two feet, go someplace else.” You shouldn’t leave the meeting, but you should find another session that meets your needs.

WHAT DOES IT LOOK LIKE? (WATCH THE VIDEO TO SEE ONE GROUP’S EXPERIENCE)

Convening: During an opening session, a sponsor sets the stage and introduces the topic. A facilitator then works with attendees to create an agenda. Attendees identify sessions that they would like to convene and those ideas are placed on a large planning grid. Session topics merge and refine as the convening session iterates. The grid becomes the agenda.

Breakouts: Attendees review the agenda, and proceed to their breakouts of choice. Breakout rooms are seated so as to facilitate open exchange and discussion, with flipcharts or whiteboards for idea sharing. During each breakout the volunteer convener takes responsibility for moving the discussion forward and a volunteer reporter records key learnings, ideas, and next steps in responding to the convening issue and issues raised.



Re-convening: The whole group reconvenes at least once at the end of the unconference to share lessons learned. Over a multi-day event, the group may reconvene at the beginning or end of each day to refine agendas, share, and plan further.

A note on technology: Unconferences often leverage technology to share with those not in attendance through blogging, tweeting, live streaming, and/or the use of a wiki or other discussion space before, during, and after the event.

WHEN SHOULD THIS FORMAT BE USED?

Unconferences are usually convened with groups of 50-500 - large enough to ensure a range of expertise, yet still small enough for a manageable agenda. Unconferences are appropriate when the conveners are comfortable with uncertainty, since although they may have a desired outcome, the agenda is driven by those in attendance. A good invitation helps to ensure that all share a common interest. Unconference outcomes include knowledge sharing, networking, and often development of plans for leveraging the knowledge and passion of those in attendance post-meeting.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Space: A large plenary room and smaller breakout rooms, ideally that can accommodate circle seating
- Planning Grid: Large wall or board with grid of rooms by time
- People: A facilitator, an invested audience, and recorders
- AV: Flipcharts or whiteboards with markers, markers and paper for grid, ideally wi-fi for live reporting and sharing
- Other: Food or access to food

WHERE CAN I LEARN MORE?

[A Brief User’s Guide to Open Space Technology](#) from Harrison Owen lays the groundwork for planning and facilitating

[Welcome to the Unconference](#) is an Inc. Magazine article that gives a great feel for what it is like to attend

[How to prepare and attend an unconference](#) from Kaliya Hamlin at unconference.net speaks for itself

WISDOM COUNCILS

Wisdom Councils are a form of participatory democracy developed by organizational development consultant Jim Rough. “A wisdom council is a one-time, randomly-selected group of stakeholders who, through special facilitation techniques— Dynamic Facilitation—produce a consensus statement which is made available to a larger population for further dialogue and action.” Wisdom councils provide paths to solutions of often complex societal issues by fostering meaningful discourse. The purpose of the Wisdom Council is to raise the quality of the conversation within the larger system as a whole.

WHAT DOES IT LOOK LIKE? (WATCH VIDEO TO LEARN RE WISDOM COUNCILS FROM JIM ROUGH)

Twelve citizens are randomly selected to choose an issue. These citizens represent a microcosm of the society and they are dynamically facilitated to create a story of coming to an answer that all 12 members can support. Bringing together a microcosm of the whole is designed to include a wide variety of perspectives, to creatively address the issues that affect everyone in the system and then share their experience with that larger whole.

“The key ingredient is Choice Creating and the ability to facilitate that,” according to Jim Rough. This is a style of thinking that solves seemingly impossible problems with a focus on “We the People”—a public perspective rather than a special interest perspective. Solutions that come out of this type of collaborative process are solutions that are supportable because they arise from the collective wisdom of citizens engaged in meaningful dialogue.



Dynamic Facilitation requires the recording of four items on chart pads during the wisdom council: (1) statements of the **problem** at hand, (2) ideas regarding **solutions**, (3) **concerns**, and (4) **data**. Recording participant input is a key to the process because it confirms to participants that what they said was heard and welcomed into the dialogue. A separate space is reserved for the **decisions** the group makes. Decisions arise as cross-talk between participants lessens and the evolving collective space is created.

WHEN SHOULD THIS FORMAT BE USED?

Wisdom councils work well to further ongoing community dialogue so that participants can reach consensus and in so doing raise the level of subsequent collective reflection. Consensus statements produced by a wisdom council are intended to be passed along to foster more widespread dialogue, which in turn further strengthens democratic processes.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- Meeting Space: A room and seating arrangement for 12 people to gather comfortably. A larger space is required when the Wisdom Council reports out to a larger audience.
- Recording Space: 5 writing pads and markers
- People: One facilitator versed in Dynamic Facilitation techniques, 12 randomly-selected individuals who represent a microcosm of the whole
- Appropriate refreshments for length of session and time of day

Where can I learn more?

[Dynamic Facilitation Associates](#) gives the specifics of Dynamic Facilitation, the approach used for Wisdom Councils

[The Center for Wise Democracy](#) provides additional information on how communities have used wisdom circles

[The Co-Intelligence Institute](#) offers an overview of wisdom council and dynamic facilitation

WORLD CAFÉ

The World Café is a method which makes use of informal conversation “cafés”. Participants explore issues through progressive discussion in small groups. The dynamic of a “café ambiance” allows for relaxed and open conversation to take place. The seven principles of the World Café approach include: 1) set the context and know the parameters of the meeting; 2) create a hospitable space that is conducive to discussion; 3) explore questions that matter; 4) encourage everyone’s contribution; 5) connect diverse perspectives; 6) listen together for patterns and insights; and 7) share collective discoveries.

WHAT DOES IT LOOK LIKE?

World Café can be modified to meet a wide variety of needs. Specifics of context, numbers, purpose, location, and other circumstances are factored into each event's unique invitation, design, and question choice, but the following five components comprise the basic model:

- 1) **Setting:** Create a "special" environment, most often modeled after a café, i.e. small round tables covered with a tablecloth, butcher block paper, markers, a vase of flowers, and optional "talking stick" item.
- 2) **Welcome and Introduction:** The event host begins with a warm welcome and an introduction to the World Café process, setting the context, sharing the Cafe Etiquette, and putting participants at ease.
- 3) **Small Group Rounds:** The process begins with the first of three or more twenty minute rounds of small group conversations during which individuals are writing, drawing and doodling insights on the butcher block paper as a record for the next round. At the end of the round, the group moves to a new table. They may choose to leave one person as the "table host" for the next round, who welcomes the next group and briefly fills them in on what happened in the previous round.
- 4) **Questions:** each round is prefaced with a question designed for the context and desired purpose of the session. The same questions can be used for more than one round, or they can be built upon each other to focus and guide the conversation.
- 5) **Harvest:** After the small groups (and/or in between rounds, as desired) individuals are invited to share insights or other results from their conversations with the rest of the large group. These results are reflected visually in a variety of ways, most often using graphic recorders in the front of the room or other recorders to capture the harvest.

WHEN SHOULD THIS FORMAT BE USED?

World Cafés are usually convened with groups of 12 – 60, although they may be used with much larger groups. The technique has been used in venues from multinational corporations to small nonprofits. The core design principles should be adapted to the practices of dialogue and deliberation that are appropriate for each setting/culture. World Cafés are appropriate when the audience is relatively invested in the topics, as input provided depends heavily on the participants’ willingness to communicate. World Cafe outcomes include in-depth exploration of key strategic challenges or opportunities, deepened relationship and ownership of outcomes in an existing group, and networking. The basic process is simple and simple to learn, but complexities and nuances of context, numbers, question crafting and purpose can make it optimal to bring in an experienced host to help.

WHAT ARE THE MINIMUM RESOURCES NEEDED?

- **Space:** A large room that can comfortably accommodate tables and chairs and traffic flow between rounds
- **People:** An event host and participants interested in the topics.
- **AV:** Flipcharts or butch block paper at each table for recording key insights, water-based markers for table groups to write, doodle and draw, and easels and charts to capture the large group harvest

WHERE CAN I LEARN MORE?

[The World Café and the World Café Community Foundation](#) is the authoritative site for World Café information

[World Café Online](#) engages World Cafe practitioners and supporters to share their experiences and learn from each other

[Documentation: World Café/Brainstorming](#) is a visual display of the raw data that can be generated at the tables

ⁱ Wikipedia, <http://en.wikipedia.org/wiki/Facilitator> 3/5/12.

ⁱⁱ <http://www.merriam-webster.com/dictionary/facilitator> 3/5/12.

ⁱⁱⁱ Bens, I. *Facilitating With Ease!: A Step-by-Step Guidebook with Customizable Worksheets on CD-ROM*, (2000) Jossey-Bass, [ISBN 0-7879-5194-3](https://www.josseybass.com/ISBN-0-7879-5194-3)

^{iv} http://en.wikipedia.org/wiki/Bohm_Dialogue

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