FSG REIMAGINING SOCIAL CHANGE

Facilitating Intentional Group Learning

A Practical Guide to 21 Learning Activities

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About FSG

FSG is a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Through strategy, evaluation, and research we help many types of actors—individually and collectively—make progress against the world's toughest problems.

Our teams work across all sectors by partnering with leading foundations, businesses, nonprofits, and governments in every region of the globe. We seek to reimagine social change by identifying ways to maximize the impact of existing resources, amplifying the work of others to help advance knowledge and practice, and inspiring change agents around the world to achieve greater impact.

As part of our nonprofit mission, FSG also directly supports learning communities, such as the Collective Impact Forum and the Shared Value Initiative, to provide the tools and relationships that change agents need to be successful.

Learn more about FSG at **www.fsg.org**.

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INTRODUCTION

"Learning is not attained by chance; it must be sought for with ardor and attended to with diligence."
— Abigail Adams

Many of today's social sector organizations are searching for ways to be more nimble, adaptive, and responsive, and they are looking to "learning" as a means for responding to myriad competing demands and shifting priorities and challenges. In particular, a range of publications and conferences have shown an interest in learning as a tool for social change. For example, in 2005, Grantmakers for Effective Organizations (GEO) reminded us that "Learning is about continual reflection—asking and answering key questions you need to know to make smarter decisions. It's about engaging staff, the board, and grantees in reflective discussion of what works (and what doesn't) to advance your organization's mission and goals" (p. 2).

Others of us, including the Center for Evaluation Innovation, Innovation Network, Grantmakers in Health, Grantmakers in Education, Grantcraft, Johnson Center at Grand Valley State University, Council on Foundations, Center for Effective Philanthropy, Nonprofit Quarterly, and a variety of foundations, corporate philanthropic organizations, and consultants, have made learning a cornerstone of our work. Many such organizations have consistently communicated the importance of being a learning organization,[1] supporting strategic learning through evaluation and

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1 Grantmakers for Effective Organizations (2005), *Learning for results* (Washington, DC); S. J. Gill (2009), *Developing a learning culture in nonprofit organizations* (Thousand Oaks, CA: Sage); K. Smith Milway & A. Saxton (Summer 2011), *The Challenge of Organizational Learning*, retrieved on 8/11/16 from: http://ssir.org/articles/entry/the_challenge_of_organizational_learning.

other forms of data collection,[2] and forging intentional connections between strategy, evaluation, and learning.[3]

While it is clear that the topic of learning remains of great importance to the social sector, many organizations, including those in the public and private sectors, seem to be stuck on operationalizing what it means to engage in and support *intentional learning* in their organizations. We hope this guide will help a wide array of professionals better understand how and when to use group learning activities to intentionally support and facilitate continuous learning through reflection and dialogue.

2 J. Coffman & T. Beer (June 2011), *Evaluation to support strategic learning: Principles and practices* (Center for Evaluation Innovation, Washington, DC).

3 P. Patrizi, E. Heid Thompson, J. Coffman & T. Beer (2013), "Eyes Wide Open: Learning as Strategy Under Conditions of Complexity and Uncertainty," *Foundation Review* 5(3): 50–65; H. Preskill & T. Beer (2012), *Evaluating social innovation* (FSG and the Center for Evaluation Innovation).

WHY INTENTIONAL GROUP LEARNING?

"Life is a learning experience, only if you learn." — Yogi Berra

The words of baseball great Yogi Berra always seem to have a nugget of truth and insight to them. Of course, we all learn things every day—that's part of being human. However, what we learn, how much we learn, and when we learn depend on several factors. While there are many definitions of learning, we particularly like the one offered by Peter Senge because it emphasizes both process *and* action:[4]

> *Learning is the process that enhances knowledge, which is the capacity for effective action.*

Organizational learning researchers have shown that a group's ability to learn is the bridge between individual and organizational learning.[5] Therefore, for organizations to be successful, individuals must have opportunities to share their learning with others. Through collaborative reflection and dialogue, participants can develop new constructions of what was, what is, and what needs to be. Supporting this idea, the authors of a 2015 GEO publication titled *Learning Together: Actionable Approaches for Grantmakers* write: "To make lasting progress on the issues we care about, we have to be learning with others all the time" (p. 4).

4 Senge has offered this definition in his workshop *Foundations for Leadership* (2016), his book *The Fifth Discipline* (1990, 2006), and in various other presentations and writings.

5 See, for example, A. J. DiBella & E. C. Nevis (1998), *How Organizations Learn* (San Francisco: Jossey-Bass); H. Preskill & R. T. Torres (1999), *Evaluative Inquiry for Learning in Organizations* (Thousand Oaks, CA: Sage); P. M. Senge (1990), *The Fifth Discipline* (New York: Doubleday); K. E. Watkins & V. J. Marsick (1993), *Sculpting the Learning Organization* (San Francisco: Jossey-Bass); D. H. Kim (Fall 1993), "The link between individual and organizational learning," Management Review: 37–50.

In the course of our daily work, social change professionals have many opportunities to learn together. These include times when we are:

- In conversation with staff, peers, grantees, partners, community members, and others
- Reviewing information provided in evaluation, research, monitoring, and grant and financial reports, as well as data from publicly available documents
- Participating in board and/or other stakeholder meetings
- Attending conferences and convenings
- Engaging in professional development experiences
- Interacting with news and social media

Intentional learning offers the greatest opportunity to apply the learning, and therefore yield the most benefit. Otherwise, learning is sporadic at best and ineffective at worst. With this in mind, we have chosen to focus this guide on intentional group learning because we want to emphasize that a commitment to learning requires time, effort, and resources. That is, supporting ongoing learning, whether in an organization, in long-term partnerships, or in learning communities, requires giving people time to come together with a clear purpose for learning, adequate planning and preparation, and skilled facilitators. With intentionality, group learning practices can be effectively and productively integrated into everyday work life.

WHERE CAN WE SUPPORT INTENTIONAL GROUP LEARNING?

When developing an intentional learning experience, you might start with identifying where people may come together to share their knowledge, engage in dialogue, have new experiences, reflect on their own and others' practices, and consider quantitative and qualitative data. Figure 1 provides examples of structures and places that likely already exist in your organization, which you may be able to leverage in new ways. And, the list may prompt you to think of other structures or places that make sense given your space, time, and resources.

FIGURE 1. MEETING STRUCTURES OR PLACES

Weekly, Bi-Weekly, or Monthly Meetings	• Staff meetings • Advisory committee/advisory group meetings • Working group meetings • Communities of practice • Task force meetings • Project meetings • Company/organization-wide meetings • Steering committee meetings • Professional (internal or external) affinity groups
Bi-Monthly, Quarterly, Semi-Annual, or Annual Meetings	• Annual staff or team retreats • Board meetings • Annual learning retreats
Special Topic Meetings	• Brown bag lunches • Partner, grantee, community convenings • Expert talks • Site visits • Community forums and town halls • Fundraising events

WHAT IS THE GOAL OF LEARNING TOGETHER

For learning experiences to be successful, it is important to identify and communicate a clear understanding of what is to be accomplished. The following are three goals we believe are particularly relevant for creating intentional group learning experiences:[6]

1. **To individually and collectively increase our awareness and understanding and to develop new perspectives.** *Groups engage in learning together to better understand an experience, situation, system, issue, or opportunity, as well as understand different, and potentially competing, perspectives*.
2. **To generate new ideas and/or solutions.** *Groups engage in learning to identify and/or refine ideas that could inform planning, design, or implementation; this might include generative discussions about solutions and possible actions*.
3. **To make important decisions.** *Groups engage in learning to reach consensus or agreement on a path forward*.

Developing and communicating a clear goal not only helps determine what kind of learning experience will be most appropriate and effective, but it also lets participants know what will be expected of them.

6 Other examples of learning goals are: 1) analyzing and building shared knowledge of an issue; 2) developing a new plan or initiative; 3) assessing current activities to identify course corrections; and 4) understanding outcomes from completed projects. See *Learning Together: Actionable Approaches for Grantmakers* (2015).

WHAT ACTIVITIES FOSTER INTENTIONAL GROUP LEARNING?

The next and longest section of this guide provides 4 quick learning activities, 11 detailed learning activities, and reference to 6 systems-thinking activities that can be used to facilitate group learning. The 21 activities described in this guide draw from a range of fields and sectors, and reflect adult learning principles, stakeholder engagement practices, systems change, and effective participatory and collaborative research and evaluation practice.[7] We've included activities that reflect a variety of learning styles and accomplish different goals, as well as those that are geared for different sized groups and amounts of time available. Our hope is that they provide inspiration and ideas for embedding intentional learning opportunities in all kinds of organizations.

When choosing any learning activity, we suggest keeping the following questions in mind:

- What type of meeting structure or place can you use or plan?
- What is (are) your learning goal(s) for the meeting?
- How much time do you have?
- How many people are likely to attend?
- Will participants already be familiar with one another?
- Would it be useful to have data available for the meeting? Or are you more interested in focusing on participants' experiences? Or both?
- Will all participants be physically in the same place?
- What are the considerations for who might facilitate this meeting?
- What accommodations may be helpful for participants (e.g., access and movement space for people using wheelchairs, seating arrangements for people with visual or hearing needs, stress balls for people with neurological needs)?

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7 For additional activities focused on analyzing data, see *Dabbling in Data: A Hands-on Guide to Participatory Data Analysis*, Public Profit, Oakland, CA. http://www.publicprofit.net/Dabbling-In-The-Data

A SAMPLING OF FACILITATED GROUP LEARNING ACTIVITIES

When choosing a learning activity, Figure 2 can be used to select one or more activities based on your goal, meeting structure, number of people involved, amount of time available, whether data will be needed or available, and whether people will be physically in the same space. The matrix is organized by the three categories of learning activities: 1) quick learning activities, 2) detailed learning activities, and 3) systems-thinking learning activities.

As you will see, we've chosen to indicate that all of the activities have the potential for promoting greater awareness and understanding. However, it's important to note that some activities, depending on how they are facilitated, could lead to more surface-level learning, such as increased awareness. Others can deepen learning, resulting in changed perspectives and ways of thinking. Thus, when choosing an activity, it's important to consider what level of learning you hope to achieve. *Note that the deeper you want learning to be, the more time will be required to engage participants in the dialogue and reflection that go with the majority of activities included in this guide*.

In addition to accomplishing one or more of the three goals, many of these activities have secondary benefits that include strengthening and/or developing new relationships through building group cohesion, norms, trust, and collaboration. Others actually strengthen certain muscles (skills), such as data analysis and interpretation, listening, and asking good questions.

Following the matrix are activity descriptions. The quick learning activities have a short summary, the systems-thinking activities include short summaries and links to more detailed information, and the 11 detailed activities include the following information:

- *What is it?* A brief description of the activity.
- *How many can participate?* An estimate of how many people can participate, though many of the activities can be adapted for larger groups.
- *How much time is needed?* An estimate of the minimum and maximum time needed. Timing estimates vary depending on number of participants, depth of discussion desired, etc.
- *How does it work?* Sufficient detail so that a user of this guide can implement the activity.

All the activities have been informed by our own and our colleagues' experiences, as well as by a broad range of resources (books, articles, the Internet) that reflect the work of many experts and experienced practitioners. We have provided a few sources and references that will help the users' implementation of the activity.

FIGURE 2. LEARNING ACTIVITIES SELECTION GUIDE

ACTIVITY	PEOPLE	TIME	GOALS			OTHER CRITERIA	
	Ideal number of participants	Approximate time needed	Promote greater awareness & understanding	Generate new ideas and/or solutions	Make a decision	Involves the use of quantitative and/or qualitative data	Can be used when participants are in different locations
Quick Learning Activities							
1. One Question	4-25	◔	✓	✓		OPTIONAL	YES
2. Mental Model Drawings	4-25	◔	✓			NO	YES
3. One Data Point	4-100	◔	✓	✓		YES	YES
4. Think-Pair-Share	6-100	◔	✓	✓		NO	NO
Detailed Learning Activities							
5. Data Placemats	2-10	●	✓	✓	✓	YES	YES
6. Before and After Action Reviews	3-10	◑	✓	✓	✓	OPTIONAL	YES
7. Chalk Talk	5-10	◑	✓	✓		OPTIONAL	NO
8. Virtual Idea Generation	5-20	●	✓	✓		NO	YES
9. Conversational Moves	6-12	◑	✓			OPTIONAL	YES
10. Gradients of Agreement	6-50	◑	✓		✓	NO	YES
11. What's on Your Mind?	8-30	◑	✓			NO	NO
12. What? So What? Now What?	8-100	●	✓	✓	✓	OPTIONAL	YES
13. Collective Story Harvest	10-50	●	✓	✓		NO	NO
14. Four Corners Perspective Change	10-50	●	✓	✓		NO	NO
15. Data Gallery	10-100	●	✓	✓	✓	YES	NO
Systems-Thinking Learning Activities							
16. Timeline Mapping	3-10	●	✓			OPTIONAL	YES
17. Trend Mapping	5-15	●	✓	✓		OPTIONAL	YES
18. Ecocycle Mapping	10-12	●	✓		✓	NO	YES
19. Actor Mapping	10-25	● ●	✓			NO	NO
20. World Café	20-100	● ●	✓	✓		NO	NO
21. Appreciative Inquiry	20-100	●	✓	✓		NO	NO

◔ = 20 minutes or less ◑ = approx. 1/2 hour ● = approx. 1 hour or more

See individual activity descriptions for detailed time recommendations.

Before we describe the activities, we want to emphasize that a key to effective group learning is facilitation—whether by a designated member of the group or a skilled external person or group. And deciding who facilitates depends on the meeting's goals and logistics. We like the following definition because it highlights the idea that a facilitator's job is to guide, not control the group:

> *To facilitate means "to make easy." The group facilitator's job is to make it easier for the group to do its work. By providing non-directive leadership, the facilitator helps the group arrive at the understandings and decisions that are its task. In a consensus group, the facilitator's focus is on the group and its work. The role is one of assistance and guidance, not of control.*[8]

Effective facilitators create a safe and participatory space by encouraging members to adhere to their ground rules and by maintaining a high energy level and positive tone. They also work to support inclusive and productive participation by intervening if behaviors become ineffective, by helping participants articulate key points and differences of opinion, by attending to accessibility needs, being mindful of the dominant culture and allowing diverse voices to be heard, making sure to keep the group on topic by moving at an appropriate pace, checking in on how things are going, and adjusting the process when alternatives are necessary.[9]

8 M. Avery, B. Auvine, B. Streibel & L. Weiss (1981), *Building United Judgment: A Handbook for Consensus Decision Making* (The Center for Conflict Resolution): 51.

9 Adapted from I. Bens, ed. (2005, 2012), *Facilitating with Ease* (San Francisco: Jossey-Bass).

WHEN PARTICIPANTS ARE IN MULTIPLE LOCATIONS

In cases where participants engage in learning from multiple locations, facilitators have an important role to play in making sure that people participating virtually are actively engaged. Special efforts may be needed to ensure that remote participants can fully contribute; for example, by asking people to say their name when speaking, proactively asking participants in other locations if they are tracking the conversation, and checking in with them before transitioning to another topic or activity. When everyone is not physically together, consider using the following.

- Phone conference lines to include all voices; use multiple conference lines if you want to have participants break into small groups for part of an activity.
- Visual technologies that provide opportunities for participants to see each other and any presented information; this helps create deeper connections and the ability to stay engaged.
- Web-based collaboration tools that allow participants to respond and provide input into the learning activity in real time.

Technologies can be used to improve accessibility even for those who are physically present. Asking up front about what accommodations may best support participation could be useful.

QUICK LEARNING ACTIVITIES *(20 MINUTES OR LESS)*

1. One Question

To address questions that participants may have about the state of something, a concern, or an opportunity, invite participants (this could be a rotating opportunity) to bring one question to a meeting. For example, a participant might be wondering about a trend they are seeing in the field and might be curious whether others are also noticing it. They may bring the following question (or multiple questions related to the larger question) to be discussed: *In conversations I've been having with our colleagues and partners, I've started sensing that XX is happening. Are any of you seeing this as well? If yes, what do we think it might mean?* Start by describing the goal of the conversation, stating the question(s), and describing how answers will be used. Spend the first 15 to 20 minutes of the meeting reflecting on and discussing this question. Don't save it until the end; you likely won't get to it if you save it for last on the agenda!

2. Mental Model Drawings

To get a quick read on how participants are viewing an issue, problem, or opportunity, provide them with an 8"x11" piece of paper and fine point markers. Ask them to take 3 to 5 minutes to draw a picture of how they "see" the chosen topic. They can share these drawings in pairs, in small groups, or as a large group. The size of the group depends on the time available and the extent to which participants are familiar with each other. A brief 10- to 15-minute large group discussion can focus on similarities, differences, and implications among the drawings (participants' perceptions). Mental Models can also be demonstrated by using Play-Doh, Legos, picture collages, poems, or other manipulatives that can serve as metaphors for one's thinking.

3. One Data Point

When you want to engage participants in the interpretation and sense-making process around a set of data but have limited time, consider choosing a data point or finding that has been recently provided from a monitoring, research, or evaluation study, grantee report, or recent local or national news story. Ask participants to spend 3 minutes reflecting on their interpretations of it and any contextual variables that might be informing their interpretations. Then, engage the group in a 10- to 20-minute discussion of their interpretations and possible implications.

4. Think-Pair-Share

When wanting to get participants' reactions to a question, comment, or an experience, ask them to take a couple of minutes to consider what they've heard or an answer to a question. After a brief period of reflection, ask them to share their thoughts with one other person. Let them know they will have 2 to 3 minutes each to reflect together. After the 5 to 6 minutes, engage the whole group in a 10- to 15-minute discussion about the nuggets of their conversation.

DETAILED LEARNING ACTIVITIES *(WITH GUIDELINES FOR IMPLEMENTATION)*

5. Data Placemats

WHAT IS IT?

This activity provides an opportunity to reflect on a set of data that is presented in a visually interesting and simple way, to co-interpret data, and to determine implications for decision making and action.

HOW MANY CAN PARTICIPATE?

This activity works best with groups of 2 to 50 and with participants who can be physically present, but it can be adapted with people who are on a phone or video conference. It is particularly meaningful for participants who are involved in the program or initiative for which the data were collected.

HOW MUCH TIME IS NEEDED?

This activity requires 60 to 90 minutes.

HOW DOES IT WORK?

Prior to the meeting, prepare a piece of paper with analyzed data such as charts, tables, quotes, or other information. The paper can be set at each participant's seat as a "place-mat" for discussion. The data may be individual findings, or they may represent themes and patterns. The data included on the placemats should reflect an interest in further interpretation and meaning-making by the participants. These might be findings that are surprising, have multiple interpretations, require a greater understanding of context, or have significant importance for the organization.

At the beginning of the meeting, the facilitator sets the stage by providing any necessary context for the data (e.g., evaluation's purpose, how the data were collected, how data were selected for inclusion on the placemat) and explains that the purpose of the activity is to develop a mutual understanding of the data, their meaning, and implications. The group engages in a discussion about one placemat at a time. If a group has multiple placemats to discuss, the facilitator clearly identifies which placemat is being discussed and when. The facilitator may ask the following questions.

- What do these data tell you?
- What surprises you about these data?
- What factors may explain some of the trends we are seeing?
- Do these findings lead to any new questions?
- What are you learning from this activity (key insights)?

The outcome of this meeting might be a need to further analyze the data and/or to integrate the interpretations into a set of next steps or action items.

SOURCE

- Pankaj, V. & Emery, A. K. (2016). Data placemats: A facilitative technique designed to enhance stakeholder understanding of data. *New Directions for Evaluation*, 149, (81–93).

Data placemats present information in a visually interesting way.

6. Before and After Action Reviews

WHAT IS IT?

Before and After Action Reviews (BAR & AAR) are structured review processes for helping a team or group of people reflect on what happened in an effort to learn, improve, and plan for the future.[10]

When implemented early on, the Before Action Review (BAR) helps group members clarify intent, expectations, and assumptions about the purpose and outcomes of the activity. It also identifies any anticipated challenges. The After Action Review (AAR) focuses on looking back at one or more phases of the work and should be conducted as soon as possible after the activity, while memories are still fresh.

HOW MANY CAN PARTICIPATE?

This activity works best with groups who are responsible for a project or activity—usually 3 to 10 people. However, it is possible to adapt the process for larger groups by facilitating small group conversations related to the questions and then debriefing as a large group. This activity can be adapted to include participants who may not be physically present.

HOW MUCH TIME IS NEEDED?

This activity requires 30 to 60 minutes or more.

HOW DOES IT WORK?

The facilitator should prepare the list of questions and post them on a page or PowerPoint slide (for virtual participants).

10 Originally developed by the National Training Center and used by the U.S. Army, it has since been adopted and adapted by many organizations in support of organizational learning and quality improvement.

Guiding questions for Before Action Reviews include:

- What are we setting out to achieve?
- What do we know from previous experience?
- How will we measure success?
- What challenges do we anticipate?
- What will help us to be successful?
- What actions do we need to take to avoid problems?

Guiding questions for After Action Reviews include:

- What was supposed to happen?
- What actually happened?
- Why were there differences?
- What worked?
- What didn't?
- Why?
- What would you do differently next time?

The facilitator might come prepared with additional questions to draw out participants if there is resistance or hesitancy to speak. Data can also be provided as a means for reflection. As participants answer each question, the facilitator writes answers on the flipchart paper (or on an online shared screen). Alternatively, group members can write responses on sticky notes, place them on the paper, and then discuss each question and its responses. It might also be helpful to have someone who is not participating take notes for later use. When it comes to the group making decisions about action steps, it's important that these are as concrete and actionable as possible.

SOURCES

- http://betterevaluation.org/evaluation-options/after_action_review
- http://www.leadingvirtually.com/virtual-team-tools-after-action-review
- http://www.nwlink.com/~donclark/leader/leadaar.html
- Darling, M., Parry, C. & Moore, J. (July–August 2005). Learning in the Thick of It. *Harvard Business Review*, 1–8.

7. Chalk Talk

WHAT IS IT?

Chalk Talk[11] is a silent way to reflect, generate ideas, and solve problems. It is particularly effective in surfacing concerns and areas of agreement among group members. The graphic representation that results from this activity communicates various perspectives and viewpoints about the topic or issue.

HOW MANY CAN PARTICIPATE?

This activity works best with groups of 5 to 10 participants who can be physically present.

HOW MUCH TIME IS NEEDED?

This activity can be done in 30 to 60 minutes.

HOW DOES IT WORK?

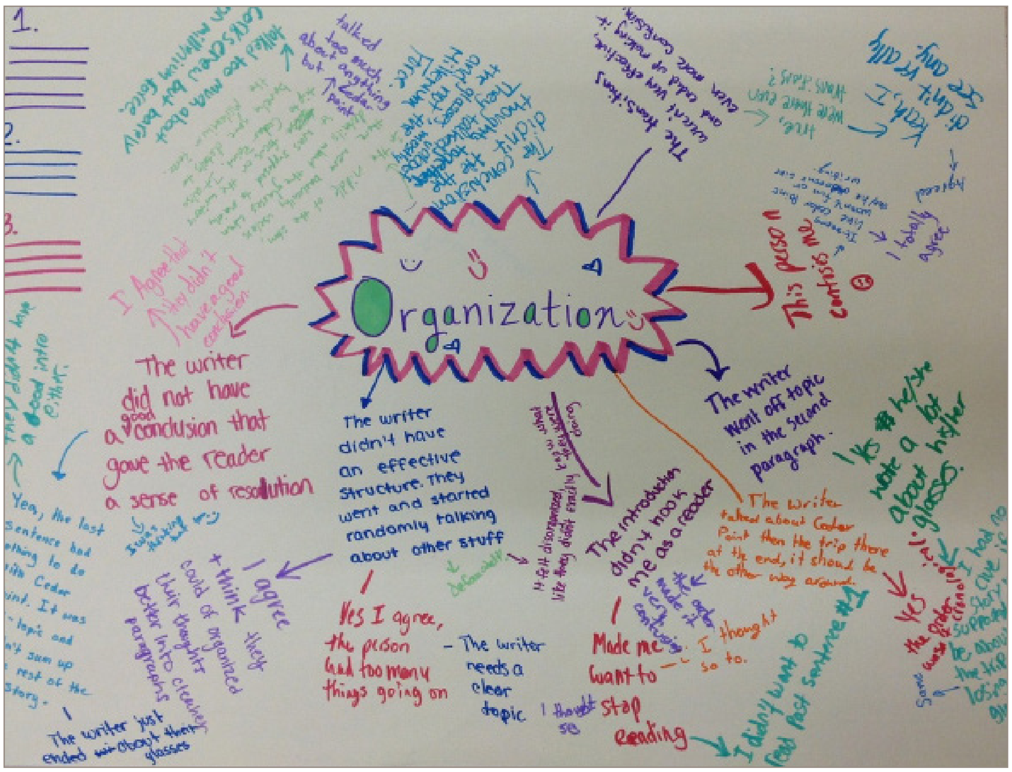
The facilitator explains that Chalk Talk is a silent activity, which will be followed by a group verbal debrief. The facilitator writes a relevant question(s) and/or data/findings on one or more pieces of flipchart paper, posts these on a wall, and makes markers available. Participants are asked to write their responses or reactions on the flipchart paper. They may circle others' interesting ideas, write questions about others' comments, add their own reflections or ideas, and can connect two or more interesting or provocative responses with a line and/or question mark. Once everyone has had a chance to write and respond as they wish, the facilitator may ask participants to share what they see on the flipchart pages.

11 This activity was originally developed by Hilton Smith, Foxfire Fund.

This might include observations about what they have in common, differences in perceptions, actions to be taken, additional information to be sought, or additional conversations to be had. With larger groups, the facilitator might ask participants to get into groups of four to six to discuss their reflections before opening it for a large group discussion.

SOURCE

- Brookfield, S. & Preskill, S. (2016). *The Discussion Book*. San Francisco: Jossey-Bass.



Chalk Talks provide the opportunity to silently reflect and respond to a question or information provided.

8. Virtual Idea Generation

WHAT IS IT?

This activity helps groups gather ideas, suggestions, or reflections in real time when participants are in different locations. Using an Internet-based sharing tool (e.g., Google Docs), participants capture thoughts virtually, allowing everyone to see what others are thinking simultaneously. This activity is ideal for learning experiences geared toward generating new ideas or solutions that may inform future decisions and actions.

HOW MANY CAN PARTICIPATE?

This activity works best with 5 to 20 people but can be adapted for larger groups.

HOW MUCH TIME IS NEEDED?

This activity requires from 50 to 90 minutes.

HOW DOES IT WORK?

Preparation for the Activity

Depending on the topic, the facilitator might ask participants to pre-read relevant documents and come prepared to provide ideas or suggestions to move the team's thinking forward. For example, if the activity will be about increasing participants' understanding of diversity, equity, and inclusion (DEI), and how they can better incorporate these concepts into their work, the facilitator might identify two or three relevant readings (e.g., articles, blog posts) for participants to read before the meeting. The facilitator can also ask participants to come to the meeting ready to answer one or two questions related to the topic of discussion. For example, they may be asked: "What did you find particularly compelling, interesting, or thought provoking in these readings? What implications might there be for our work?"

Technology Set Up

Choosing the appropriate technology is crucial for the success of this activity. The facilitator should prepare a Google Doc or other web-based collaboration tool where many people can both see the document and contribute to its development.

Facilitators can organize the document so that different topics to be discussed are clear (e.g., using tables to separate different topics, findings, or data points). Each topic should reflect where the group needs to provide ideas, suggestions, or feedback. For example, if your group is trying to bring a DEI lens or set of principles into their work, they might want to think about how to integrate it in their grantmaking, their internal operations, their relationships with communities, and so on. It is important to take some time to determine the desired areas of focus for the conversation.

It is also important to have a conference line and link to the web-based document (e.g., Google Doc) available so everyone can dial in at the beginning of the conversation.

In order to be successful, ensure that everyone has access to a computer and wi-fi on the day of the activity, or provide accommodations to those who don't.

The Day of the Activity

To start, a facilitator asks participants to share overall reflections from the pre-reads with the group. A round robin style gives everyone an opportunity to answer the questions posed with the pre-reads. The facilitator or a designated note taker captures the main reflections in the web-based document, so that everyone sees what is being said.

Next, participants are divided into small groups of 3 to 5 people and asked to take 20 to 30 minutes to provide ideas for specific topics identified during the preparation period. Multiple conference lines may be needed for small group conversations if there are not clusters of people in the same location. One member of each small group is designated to take notes from the conversation in the web-based document.

In the final part of the activity, the full group comes back together and the facilitator asks each of the small groups to present their main ideas. After each group shares, participants are asked to make additions either directly to the document or on the phone. The facilitator can help the group refine each group's primary insights and make changes in real time. This part of the activity can take from 30 minutes to an hour depending on how many people are involved and how generative the group is.

After the meeting has concluded, the facilitator can go back to the document, clean up the information, and determine next steps based on the ideas provided by the group.

SOURCE

- Activity designed by FSG.

9. Conversational Moves

WHAT IS IT?

This activity provides participants with an opportunity to engage in meaningful conversation about an issue, challenge, opportunity, or set of data by asking questions and listening with intent. When done successfully, this activity increases the group's energy and provides structure for deeper conversations.

HOW MANY CAN PARTICIPATE?

This activity works best with groups of 6 to 12 participants and can be adapted to include participants who may not be physically present.

HOW MUCH TIME IS NEEDED?

This activity requires approximately 30 to 60 minutes.

HOW DOES IT WORK?

The facilitator writes a number of "conversational moves" on pieces of paper or index cards. Conversational moves are specific behaviors or actions that someone will be asked to enact. The following are examples of conversational moves.[12]

- Ask a question or make a comment that shows you are interested in what another person has said.
- Ask a question or make a comment that encourages someone else to elaborate on something he or she has said.
- Make a comment that underscores the link between two people's contributions. Make this link explicit in your comment.
- Use body language to show interest in what different speakers are saying.
- Make a comment indicating that you found another person's ideas interesting or useful. Be specific about why this was the case.
- Pose a problem or a dilemma.

12 Brookfield, S. & Preskill, S. (2016). *The Discussion Book*. San Francisco: Jossey-Bass, pp. 54-55.

- Play the devil's advocate: Listen carefully for any emerging consensus and then express a contrary viewpoint, whether you believe it personally or not.
- Contribute something that builds on or springs from what someone else has said. Be explicit about the way you are building on the other person's thoughts.
- Make a comment that at least partly paraphrases a point someone has already made.
- Make a summary observation that takes into account several people's contributions and that touches on a recurring theme in the discussion.
- Disagree with someone in a respectful and constructive way.
- Point to a specific passage in the assigned text that is particularly helpful either to illuminate or to problematize the current direction of the discussion.
- Create a space for someone who has not yet spoken to make a contribution.

The facilitator places these cards face down on a table or passes them to the group. Group members randomly choose a card, read and think about it, and are asked not to disclose their move to anyone else. Participants then engage in a discussion about the chosen topic (determined prior to the meeting). The topic may be about an issue, challenge, opportunity, or a set of data. The facilitator explains that they can participate in any way they wish, but they should use their move when it feels appropriate and helpful. Since the move should never be forced, participants may be told that they might not use their move and that's okay. When the discussion is over, participants are asked to share their moves and to talk about how well it worked, what they experienced, what was learned, and what impact their experiences might have on future conversations.

SOURCES

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- Brookfield, S. & Preskill, S. (2005). *Discussion as a Way of Teaching: Tools and Techniques for Democratic Classrooms*. 2nd Edition. Jossey-Bass.
- http://charemliteracy.weebly.com/uploads/1/6/5/0/16504920/discussionstrategies.pdf

10. Gradients of Agreement

WHAT IS IT?

This activity provides a means for determining how aligned participants are in their thinking, especially when it comes to making a decision. It provides an opportunity to gauge the entire group's perspective quickly, and it provides the means for the group to discuss why there are differences in perspectives (that is, it helps participants explore assumptions and previous understandings). It is best to use when input into a decision is desired (and that input will be considered).

HOW MANY CAN PARTICIPATE?

This activity works best with a group of 6 to 50. This activity can be used with those not physically present if they are provided with the rating scale in real time or in advance of the conversation.

HOW MUCH TIME IS NEEDED?

This activity can be implemented in 5 to 45 minutes.

HOW DOES IT WORK?

At the appropriate time, the facilitator explains that a decision needs to be made concerning a strategy, an action, or a path forward. But before making a final decision that will be acted upon, the facilitator should determine individual people's level of agreement with the decision. Participants will be asked to rate how they are thinking or feeling based on a rating scale that is projected or provided in a handout.

The rating scale should be between 3 and 8 points, and each point on the scale should describe a point of view along a gradation. The following are two sample scales, though any scale can be developed based on the purpose of the exercise.

This type of activity has also been called the *Fist of Five.*[13] It is a quick and simple way to gauge the group's perspective on the decision to be made. Participants raise their hand and indicate with 1 to 5 fingers what they think about the decision. Facilitators can be mindful of accommodation needs and can offer numbered index cards as an alternative.

13 http://sparkpolicy.com/tools/wp-content/uploads/2015/04/Gradients-of-Agreement.pdf

1. I cannot accept this decision.
2. I need revisions before I can accept this decision.
3. I can accept this decision, but I have some reservations.
4. I am mostly satisfied with this decision—I can support it.
5. I am very pleased with this decision and fully support it.

Another example, this one with 8 points on the scale, also defines the kinds of support people have for the decision. With this scale, participants can write down their rating and share it in pairs, small groups, or the larger group. The facilitator may note on a flipchart how many people indicated each rating.

FIGURE 3. 8-POINT SCALE

Enthusiastic Support	1. Fully support—"*I like it.*" 2. Endorsement with minor concerns—"*Basically I like it.*"
Lukewarm Support	3. Agree with reservations—"*I can live with it.*" 4. Abstain—"*I have no opinion.*" 5. Stand aside—"*I don't like this, but I don't want to hold up the group.*"
Meager Support	6. Disagreement, but willing to go with majority—"*I want my disagreement noted, but I'll support the decision.*" 7. Disagreement, with request not to be involved in implementation—"*I don't want to stop anyone else, but I don't want to be involved in implementing it.*"
Strong Objection	8. Can't support the proposal.

If time is available and there is a diversity of opinions, the facilitator can engage the group in a dialogue about why there are differences of opinion, what concerns participants have about the decision, and how differences might be reconciled before a final decision is made.

SOURCE

- http://www.teamstarproject.org/pdf/Team%20Decision%20Making.pdf

11. What's On Your Mind?

WHAT IS IT?

This activity helps those who tend to be quieter or uncertain about how others will receive their thoughts to share their ideas and experiences with one other person before sharing them with a larger group. The activity provides participants with support and possibly confidence to share their thinking with others.

HOW MANY CAN PARTICIPATE?

This activity works best with a group of 8 to 30, mid-way through or near the end of a lengthier conversation. This activity also works best when participants can be physically present.

HOW MUCH TIME IS NEEDED?

This activity can be implemented in 20 to 40 minutes.

HOW DOES IT WORK?

After a conversation has been underway for a while, the facilitator explains that many participants have offered interesting questions, insights, concerns, and hopes. At the same time, they are certain that there are some things that have not been shared but are on people's minds. Because it's so important to hear things that haven't yet been said, the facilitator asks participants to get into pairs.

In their pair, each partner is asked to answer the following question: "During this discussion, have I had any thoughts I haven't said aloud?" The facilitator assures participants that they don't have to answer the question if they don't have anything they wish to share.

Each person takes 3 to 5 minutes to answer the question. Next, the facilitator asks participants, still in their pairings, to answer the following question: "Would the group benefit from hearing your partner's thinking?" Participants discuss their response to this question for another 3 to 5 minutes.

The facilitator then asks everyone to come back to the large group, and invites volunteers to share any aspects of the conversation that would be helpful for others to hear. It is a good idea to reserve 10 to 15 minutes for the large group debrief.

SOURCE

- Kaner, S. (1996). *Facilitator's guide to participatory decision-making*. Gabriola Island, BC, Canada, New Society Publishers, p. 165.

Sharing in pairs initially may help quieter participants feel more comfortable sharing later in the larger group.

12. What? So What? Now What?

WHAT IS IT?

This activity provides participants with an opportunity to share understandings and new insights, and to plan for next steps. It is particularly useful for generating new ideas and solutions, engaging multiple perspectives, addressing complex challenges, and potentially making decisions.

HOW MANY CAN PARTICIPATE?

This activity works best with 8 to 100 people, as long as they can be organized into groups of 5 to 7. The activity can be adapted for those who are not physically in the same space if they can form a group over the phone.

HOW MUCH TIME IS NEEDED?

This activity requires about 45 to 60 minutes.

HOW DOES IT WORK?

After a shared experience, participants are asked to join a conversation that will ask them to consider what happened, why it was important, and what actions are now warranted. The facilitator begins the activity by asking individuals to reflect silently for one minute on the question "WHAT?"—"What happened?" "What did you notice?" "What facts or observations stood out?" Participants then discuss their reflections with others in their small groups for 2 to 7 minutes. The facilitator then invites the small groups to report out salient facts with the larger group for 2 to 5 minutes per group. The facilitator captures the main themes from the small group report-outs on this and the subsequent questions.

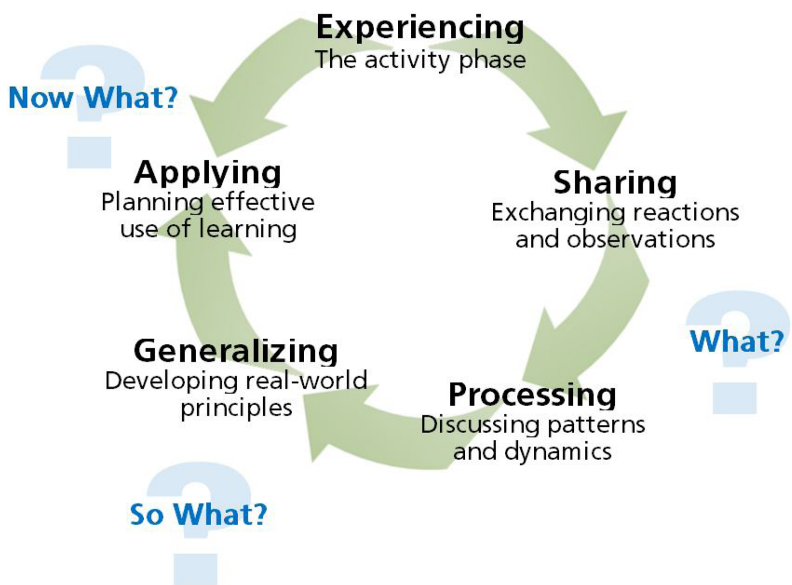
The facilitator asks everyone to reflect on "SO WHAT?" for one minute. Individually, participants consider: "Why is this important?" "What patterns or conclusions are emerging?" "What hypotheses can I/we make?" Participants in their small groups then share their reflections with each other for 2 to 7 minutes, and for another 2 to 5 minutes per group in the larger group.

In the third phase of the activity, the facilitator asks participants to reflect on "NOW WHAT?"—"What actions make sense?" for 1 minute. Again, they take 2 to 7 minutes to share their thoughts with those in their small group, followed by a 2 to 5 minute large group report-out. If desired, a fourth question can be posed to the group—"WHAT IF?"—to develop ideas for experimenting with a new approach or solution.

To conclude, the facilitator reviews the actions shared with the whole group and engages participants in a conversation about how these can be implemented.

SOURCE

- Lipmanowicz, H. & McCandless, K. (2013). *The Surprising Power of Liberating Structures*. Seattle, WA: Liberating Structures Press, pp. 197–201.



The Experiential Learning Cycle: An example of What? So What? Now What?

13. Collective Story Harvest

WHAT IS IT?

Through this collaborative meaning-making activity, participants act as thinking partners for a selected group of storytellers who share a story of a project or experience. The activity allows groups to deeply connect with each other through dialogue; it also helps them to practice listening skills, allowing them to learn from the stories and from each other. The activity is ideal for groups looking to bring different perspectives to a situation or learn collectively from a past experience.

HOW MANY CAN PARTICIPATE?

This activity is appropriate for small groups of 5 to 10 people, and it can be adapted for larger groups of up to 50 by dividing participants into small groups of 5 to 10. The following description is based on the group's size being 5 to 10, though modifications for a larger group are presented at the end.

HOW MUCH TIME IS NEEDED?

This activity requires from 60 to 120 minutes.

HOW DOES IT WORK?

The description below assumes a small group of 5 to 10 people and only one storyteller.

Preparing for the Harvest

The facilitator should identify a specific experience the group wants to learn more about or a particular situation the team wants to reflect on. For example, colleagues may wonder how a coworker has established productive relationships with funders or how the organization has improved relationships with community members after numerous unsuccessful attempts. Next, the facilitator identifies a storyteller within the group whose story is relevant to the specific situation to share their experience with the rest. The storyteller must have a few days to prepare the story in advance of the activity; the story should be about 15 to 30 minutes long.

It's important to provide support to the storyteller to ensure that the story is told in chronological order, that it has a clear protagonist, and that the storyteller highlights the main challenges and other important critical parts of the story. The story does not need to be told in a specific or polished way, as long as the storyteller highlights the most important elements and tells the story in an authentic voice and style.

The Day of the Harvest

To deepen the learning experience, the audience can engage with the story through a set of lenses, or themes, that the group believes would be most beneficial. The facilitator begins the activity by presenting the suggested list of potential lenses (see list below). The group can add additional lenses based on what members want to learn from the story.[14]

- Narrative—people, events, and stages
- Process—interventions, processes, applications, and discoveries
- Critical moments—learning moments, breakthrough moments
- Leadership—leader's role, leadership practices
- Assumptions—unspoken assumptions made by participants
- Unexpected consequences—events and results that were not intended
- Moments of joy—moments that make you feel hopeful
- Questions—questions the story raises for you

Once the most relevant lenses have been chosen, the facilitator asks each participant to choose the specific lens they would find most useful in guiding their listening of the story. If possible, each lens should have at least one listener to ensure that all relevant lenses will be used.

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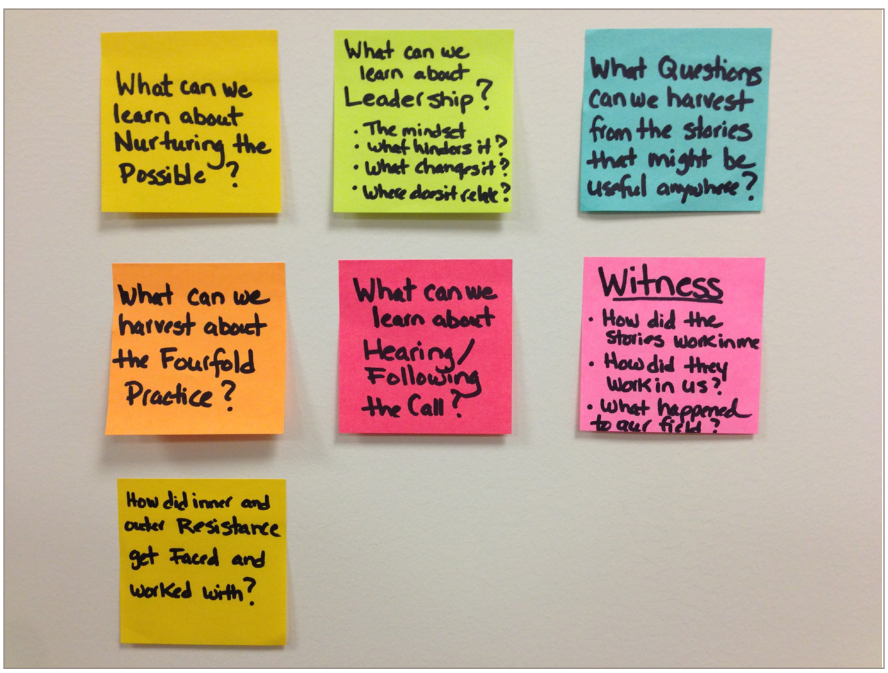
14 Adapted from A. Fenton (2013) *Collective Story Harvest: A Quick Reference Guide to Hosting a Collective Story Harvest*. Retrieved on August 15, 2016 from: http://amandafenton.com/wp-content/uploads/2013/01/Collective-Story-Harvest-To-Go.pdf.

Next, the facilitator introduces the storyteller and invites them to share their story. While actively listening, each participant relates the story to their chosen lens to capture, or "harvest," reflections that will be shared with the group. The facilitator can provide pens and paper if participants want to take notes.

Once the storyteller finishes, participants can spend 20 to 40 minutes sharing reflections from the story based on their chosen lens. The facilitator can take notes on flipchart paper to capture the main points from the reflections. After all the participants have shared, the storyteller is then invited to talk about what they learned from the reflections.

For the final 15 to 30 minutes, the facilitator can engage participants in a group discussion guided by one or two questions that can help them articulate the main takeaways and lessons learned from the story and their reflections. Questions might include: What did you learn from the story? What insights are you taking away to apply to future work situations? The facilitator may write the group's common reflections and synthesis of the activity on the flipchart.



Collective Story Harvest questions

Possible Modifications to the Activity

Have more than one story. If it is relevant to present different stories related to the same topic, either to contrast experiences or to include different perspectives, the facilitator can include more than one storyteller and can ask them to prepare shorter stories.

For groups larger than 10. If there are more than 10 people, the facilitator can divide participants into small groups of 5 to 10 and carry out similar instructions. Once the large group identifies the lenses that will be used during the activity, small group participants choose their lens, making sure that all relevant lenses are used in each small group. After the storyteller shares the story with the full group, participants can engage in small group reflection. Finally, if possible, each small group reports back on main lessons learned, and the facilitator engages the full group in a final reflection session to capture the main takeaways.

SOURCES

- Fenton, A. "What is the Collective Story Harvest?" Retrieved on August 15, 2016 from http://amandafenton.com/core-methods/what-is-the-collective-story-harvest.
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- Plays-In-Business.com "Collective Story Harvesting." Retrieved on August 30, 2016 from http://www.plays-in-business.com/collective-story-harvesting/.

14. Four Corners Perspective Change

WHAT IS IT?

This activity helps participants see alternative perspectives on an issue, with the goal of helping them broaden the way they think about an issue. It works best when there are various opinions, attitudes, and points of view about an issue, and when there is a need to find common ground in order to move forward.

HOW MANY CAN PARTICIPATE?

This activity works best with groups of 10 to 50 people who can be physically in the same space.

HOW MUCH TIME IS NEEDED?

This activity requires approximately 45 to 90 minutes.

HOW DOES IT WORK?

The facilitator starts by posing 3 to 5 different points of view on a particular issue or topic that may have emerged from observations and previous conversations. Each point of view is written on flipchart paper and posted in a corner or part of the room.

Participants are asked to go to the flipchart page that reflects their own *current* point of view. They are asked to spend 5 minutes discussing why they have this perspective with others who have a similar point of view.

The facilitator then asks participants to go to a different flipchart page (perspective)—for example, to move to the flipchart page to the right. The facilitator should be mindful to leave space for people with wheelchairs or other mobility needs. The group now talks about the issue from this new perspective. Group members are asked to spend 5 to 10 minutes seriously considering what holding this new perspective would look like, as if they were to adopt this perspective. The question for them to answer is: "What is your new point of view?"

From here, a person from each group volunteers to be part of a four-corners discussion panel; the panel would include one person from each perspective. Panelists must talk from the perspective they ended up at when asked to move beyond their original perspective. This experience usually results in the group having a broadened understanding and point of view on the topic. It's a way of opening up other ways of seeing an issue, which often translates into more informed and effective decisions or paths forward.

SOURCE

- Taylor, K. & Marienau, C. (2016). *Facilitating Learning with the Adult Brain in Mind*. San Francisco: Jossey-Bass.

15. Data Gallery

WHAT IS IT?

Also known as Data Walks, this activity provides participants with an opportunity to interactively and collaboratively review data generated from research and evaluation studies and/or publicly available data. In so doing, participants may develop a shared understanding of what the data mean and the resulting implications pertaining to improved policies, programs, or other organization and community change factors. Data galleries can be used with organization members as well as with community stakeholders. They have the potential to spur both individual and collective action among participants.

HOW MANY CAN PARTICIPATE?

This activity works best with groups of 10 to 100 participants; more participants will require more flipchart pages with data. A good estimate is eight people per group so that everyone can absorb and discuss the data. For 100 people, a data gallery activity would therefore need about 12 flipchart pages with data. This activity requires participants to be physically in the same space.

HOW MUCH TIME IS NEEDED?

This activity requires approximately 45 to 120 minutes.

HOW DOES IT WORK?

A topic of conversation, for which data are available, is determined by the facilitator and/or group invited to the data gallery. The goal is for participants to reflect on and discuss the data in support of collaborative sense-making, increased understanding, and ideas for action. The analyzed or aggregated data may be from an evaluation or research study or from data available from public documents and databases. The data shared should be carefully chosen (less is sometimes more) and aligned with the meeting's objectives and desired outcomes.

To prepare for the data gallery, the facilitator writes one to three data points on each page (these may be drawn or printed from a computer and made into posters or handouts). Remember that the more data you show on a flipchart page, the more time it will take for participants to process what is there. The data should be shown in tables, charts, drawings, photographs, and quotes. As each flipchart page is developed, it's important to consider the ease of reading and meaning making by participants.

Just prior to starting the data gallery activity, the facilitator should hang each of the data-filled flipchart pages on the wall around a room. Make sure the room is large enough for several flipchart pages and that participants can move freely around the room, and that the pages are not placed too high if there are participants using wheelchairs. When ready to start, the facilitator asks participants to get into small groups and explains that they will have 6 to 10 minutes to reflect on and discuss the data on one of the flipchart pages. It can often be useful to create small groups of people who have a different perspective or role (e.g., mix of sectors, organizations, ages, tenure). They may be asked to respond to a few questions in their small groups. For example: 1) What are some ways to interpret these data? 2) What questions do these data bring to mind? 3) What surprises you about these data? At the end of 10 minutes, participants are asked to move to their right to another flipchart page. Here again, they are to review the data and discuss it with their group. Depending on how much time is available for this activity, participants could visit several data pages.

Participants review information interactively in Data Galleries.

To debrief this activity, the facilitator may ask the following reflection questions.

- What patterns did you see in the data? What gaps?
- What do you find interesting in these data?
- What assumptions might these data help to test?
- What other data would you want to have a fuller picture of the current context?
- Whose perspective is reflected in these data? Whose is missing?

SOURCES

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- Pettit, Kathy. (2014). "Using Data to Spur Community Problem Solving: Case Study of Austin's Community Summits." Presented at Neighborhood Revitalization Conference, Washington, DC, July 2014. http://www.neighborhoodindicators.org/library/catalog/using-data-spur-community-problem-solving-case-study-austin%25E2%2580%2599s-community-su.

SYSTEMS-THINKING LEARNING ACTIVITIES

Additional details for facilitating these activities can be found on FSG's website. Use the links below to learn more.

16. Timeline Mapping

Timeline mapping is the process of arranging important investments, events, actions, activities, achievements, and other milestone markers in chronological order so that they can be seen in temporal relationship to one another and to key contextual factors (e.g., social, economic, political, demographic, and cultural events and trends). Click **here** to learn more about this tool.

17. Trend Mapping

A trend map is a visual depiction of relevant developments that have been or are currently influencing the system on a given topic. It is illustrated by using the collective knowledge and experience of a group of people familiar within a given system and its context. Click **here** to learn more about this tool.

18. Ecocycle Mapping

The ecocycle framework is a visual depiction of where on the long-term process of development, conservation, destruction, and renewal (terms drawn from biological research) different initiatives, programs, or even parts of an organization are currently operating. Click **here** to learn more about this tool.

19. Actor Mapping

An actor map is a visual depiction of the key organizations and/or individuals that make up a system, including those directly affected by the system as well as those whose actions influence the system. Click **here** to learn more about this tool.

20. World Café

The World Café method is designed to create a safe, welcoming environment in which participants connect multiple ideas and perspectives on a topic in several rounds of small-group conversations. Click **here** to learn more about this tool.

21. Appreciative Inquiry

Appreciative Inquiry is the study and exploration of what gives life to human systems when they function at their best. This approach to personal and organizational change is based on the assumption that questions and dialogue about strengths, successes, values, hopes, and dreams are themselves transformational. Click **here** to learn more about this tool.

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