Facilitator's Tool Kit

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Office of Quality Management
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Glossary

Facilitator's Role: The role the facilitator plays during meetings or focus sessions.

Focus Session: There are different styles of these. These sessions are held with participants to obtain information on specific issues.

Customer Window: A tool used during customer focus sessions that assists in looking at all aspects of customer satisfaction.

Brainstorming: A technique used in a focus session to gather input by triggering thoughts at a fast pace from the participants on specific issues.

Multi-voting: A voting technique used to prioritize items/ideas.

Nominal Group Technique: A method used to validate the importance of specific ideas.

Consensus: A decision that is not a unanimous vote but rather a fundamental agreement.

Flow Charting: A diagram that provides a picture of how a process flows.

Affinity Diagram: A technique used to identify major themes out of large number of ideas.

Cause & Effect: A diagram used to illustrate the various causes effecting a process.

Introduction

As the work place changes and individuals are required to take on different roles within their working environment it is important that they have the tools needed to perform these new tasks.

Are you being asked to facilitate a working session? What is a Focus Session and what tools are used to facilitate such a session? Do you know how to flow chart a process? What is Consensus Decision Making and Nominal Group Technique? How do you Brainstorm? These are some of the questions and tasks that individuals are being faced with daily. If you don't know the answers to these questions then this ToolKit will be very helpful to you.

Facilitator's Role

The facilitator is responsible for the process of the meeting — how the participants work together. The facilitator should be neutral and non-evaluating. The facilitator should encourage the participants to use the most effective methods for accomplishing their task in the shortest amount of time.

TIP:

Remember, know your audience.

Not every audience is the same.

Don't use the same set-up, style, or session for every audience.

Facilitators:

- Set a positive tone for discussion
- Remain neutral to the issues
- Keep the group focused
- Keep track of time
- Suggest methods and procedures that can help the group work better
- Encourage participation by everyone
- Educate/Inform participants about activities and steps
- Protect ideas from challenge
- Coordinate administrative details
- Record information or supervise its recording

Set the Climate:

Your opening remarks will set the tone of the session. Will the session be structured and formal or will it be friendly and informal? As the facilitator remember to:

- Clarify the purpose and what the expected outcomes of the meeting
- Introduce yourself and the role you will play
- Explain the agenda, ground rules and any handouts
- If comfortable, use an icebreaker or introduction type of activity

Facilitator Intervention

There are different types of facilitator interventions.

Conceptual: Provide an organizing concept, specific technique, series of steps, set of ground rules, or exercise that helps the group accomplish its task.

Prompting: Help prompt, reinforce or clarify already agreed-upon standards or processes.

Process Observations: Heighten a group's awareness of what is happening and point out the implications and consequences of the group's actions.

Evaluative: Use the power of your role as facilitator to reinforce effective behaviors and discourage ineffective ones. These interventions are judgmental and are most useful for establishing norms within the group.

Silence: Not intervening is sometimes useful to build tension or frustration in the group. This might spur the group into redirecting its own actions without the facilitator's help. Best with mature or highly effective groups.

Focus Sessions

There are different styles of focus sessions. Some examples are: the classic session, the round table discussion, and the strategic planning session.

The classic session traditionally involves a large group of individuals who are brought together to discuss a specific topic or issue and provide their ideas. The participants are not given information or questions prior to the session. (However, in some instances preparatory information is preferred.) The participants come to the session fresh with no preconceived concepts. During this session it is hoped that consensus will be reached and that the sponsor/process owner will be able to walk away with an idea of what they need to do from the participants perspective. These sessions can run from 2-4 hours. The following is an agenda of what a classic session might look like.

- Opening remarks (usually sponsor or process owner)
- Overview (what is the session about)
- Session begins usually with introductions (facilitator)
- Brainstorming in groups (give some brief instruction)
- Multi-voting of issues brainstormed in groups
- Report out
- Nominal Group Technique (whole room)
- Closing Remarks and Evaluation

The roundtable discussion traditionally involves a group of 8-16 individuals. They are usually brought together to talk about a specific issue. In most instances the participants are provided with information before the session so that they can be prepared to discuss particular aspects/ questions. These sessions are facilitated, but usually chaired by the process owner or sponsor. Rather than or in addition to using flip charts to record the information note takers (usually 2-3) are in attendance to record information. These sessions can run from 2-4 hours. During this type of session:

- Introduce note takers and explain their role (that they are capturing major items of interest).
- Restate the purpose of this roundtable discussion
- Ensure that participants understand that consensus is not required or needed during this type of session.
- Facilitators role is to guide the discussion and act as “air traffic manager” during the session.
- Facilitator should encourage everyone to talk. It should be explained that if one person has taken over the session the facilitator will intercede and bring the session back to a group discussion.

At the end of the session a summarization of the major points recorded during the discussion should be reviewed. A prepared copy of the information captured during the session should be provided within one week after the session.

Ground rules:

One person speaks at a time; no side-bar discussions
Avoid evaluation or judgment
Be specific
Keep discussion focused
Disagree openly with any member of the group

Focus Session Checklist

The following checklist has just about everything you would need to hold a successful focus session. Not all the items on the list will be needed for every focus session. Many items listed would be used only for a focus session held with external customers outside of the immediate work area.

1. Define purpose/objective of session
What information are we looking for?
What do we plan to do with it?

2. Identify customer type/grouping

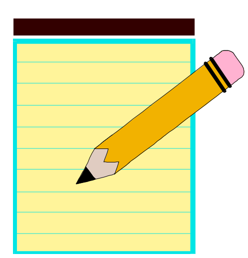
3. Identify customer locations
Generate report from customer database
Analyze report to Identify concentrated areas

4. Determine dates of session(s) and where to hold them

5. Obtain management approval

6. Identify individuals who will place calls to participants
Selection criteria:
- Good speaking skills
- Understands the process
- Understands purpose of session

7. Draft agenda for session(s)
Develop questions
Design session format
Identify time requirements



Focus Session Checklist

(Continued)

8. Logistics (when applicable)

- Hotel Reservations
  - Conference room rental and layout
  - Break refreshments
  - Overnight accommodations at government rate
  - Equipment rental (e.g., easels, overhead projector)
- Travel arrangements
  - Airfare
  - Shuttle service/rental car

9. Call randomly selected customersl

10. Train individuals on telephone technique (if necessary)

- Design script to follow

11. Begin placing calls to customers

12. Prepare documentation to fax participants

- Finalize agenda
- Develop confirmation letter
- Directions to session site with parking instructions

13. Clearly define roles/responsibilities for workers

14. Enter expenses into system

- Travel order
- Purchase order or credit card for rental of room and/or equipment

Focus Session Checklist

(Continued)

15. **Fax documentation (agenda, confirmation letter) to participants**
16. **Develop confirmed participation list**
17. **Assemble session materials**
    Agenda
    Handouts
    Feedback sheets
18. **Pack supplies for session(s)**
    Markers, pencils, dots, name plates, papers, folders
19. **Ship box of supplies to session site (if necessary)**
    Call shipping company
    Call site to verify arrival
20. **Reminder calls to participants one week before session**
21. **Conduct focus session(s)**
22. **Compile and analyze session(s) results**
23. **Create report which summarizes results**
24. **Create thank you letters and send to participants**

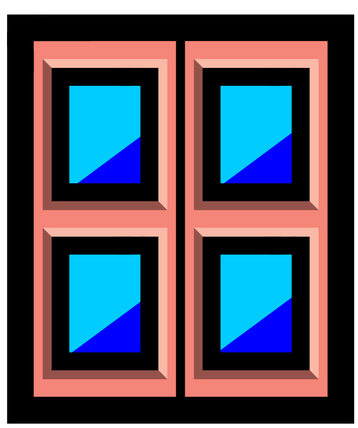
Customer Window

The Customer Window is a method that has been used for many years. We at the USPTO used it when we first started facilitating focus sessions in the early 90's. By using this methodology and tool the facilitator and participant is forced to look at all aspects of customer satisfaction by walking through each quadrant during the focus session. The customer window quadrants ask:

1. What does the customer want and doesn't get,
2. What does the customer want and gets,
3. What doesn't the customer want and gets anyway,
4. What doesn't the customer want and doesn't get.

This whole methodology can illustrate very quickly and clearly why your customer is satisfied or not satisfied depending on the answers received for each quadrant.

The following page illustrates the Customer Window for you.



Customer Window

Want

Don't Get	Customer wants and does not get A	Customer wants and gets B	**Get**
	Customer does not want and does not get D	Customer does not want and gets anyway C	

Don't Want

Brainstorming

Innovative ideas generated by customers and employees are the lifeline of continuous improvement. While ideas can come to us at any moment, we can stimulate them in what are called “brainstorming” sessions. When you start a brainstorming session clearly state the objectives of the session to all participants. Allow everyone time to write down some ideas (silent brainstorming) before beginning the process. Allow each person to express an idea or thought and ensure that a scribe or recorder is capturing the information on a flipchart. The discussion on each idea should be minimized, but try to encourage others to build on stated ideas.

When using the technique of brainstorming set a time limit, have participants offer ideas when it’s their turn, any idea is acceptable, have participants say “pass” if they don’t have an idea, and never criticize, question, or even praise other’s ideas. **Remember:**

- Any idea is acceptable. There are no silly ideas. All ideas should be written down, they are all important.
- Do not criticize or question someone else's ideas.
- Go around the table and provide each participant (including the recorder) the opportunity to present an idea.
- Move quickly - no anecdotes or elaboration.
- After each participant has had a turn, accept ideas from anyone at the table. If a participant cannot think of an idea, he/she should pass.
- Continue this process until the participants feel that they have exhausted all ideas or the allotted time is over.
- Discuss and clarify.

Brainstorming

(continued)

Brainstorming can be done in several ways:

Freewheeling.....a method where everyone contributes ideas spontaneously. The advantage of this method is that it encourages creativity as people build on each other's ideas. The disadvantage is that quiet members of the group may not speak up.

Round Robin.....a method where people take turns presenting their ideas one at a time. The advantage of this method is that all participants get equal chances to speak up and quiet people are more likely to contribute. The disadvantage is that it stifles spontaneity and sometimes members forget their idea by the time their turn arrives.

Slip Method.....a method where everyone puts ideas on a slip of paper and passes it in to the facilitator. The advantage to this method is that some people may be more candid and creative with anonymity preserved. The disadvantage is not hearing other member's ideas which often triggers add-on creativity.

Multivoting

Multivoting is a technique for narrowing down a list of ideas or options. It is usually used during focus sessions in conjunction with brainstorming. When participants perceive significant merit in more than one item this technique can be used to quickly identify the most important items on the list. This technique is best suited for use in large groups. It is a valuable technique when there is difficulty in reaching consensus. (Note: It should not be used when trying to reach consensus on a single issue.) Multivoting allows for each participant to participate equally in the decision making process. This is particularly important in gaining acceptance and buy-in for future actions based on the decision.

Guidelines

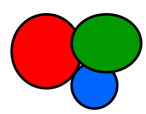
- Display the items under consideration on a flipchart, making sure to eliminate duplicates.
- Number the items on the list to facilitate record keeping.
- Give each team member a number of votes equal to approximately one half of the number of items on the list or the number agreed upon by the facilitation staff.
- Have each team member vote for the items he or she believes are most important. Team members may cast all votes for one item, split the votes among several items, or vote for individual items until they use their allotted number of votes. (Some people believe only one vote should be allowed.)
- Tally the votes.
- Select the four to six items that received the highest number of votes. Discuss and rank order the items. If the team cannot establish the top four to six, remove the items having the fewest votes and then conduct another vote.

Multivoting

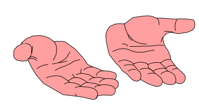
(Continued)

Explaining Types of Voting

Dots..... participants are each given adhesive dots. One dot is provided for each vote the participant is allocated. If desired, each member can be given different colored dots. Participants stick their dots next to the items on the flip-chart that they are voting for.



Show of Hands..... the facilitator asks for a show of hands on each item on the list. Participants track how many times they have voted and are on the honor system to raise their hands only the pre-determined number of times.



Ballots..... The list of items is reproduced on a paper ballot, and team members identify their preferences. This method is the most confidential, and ensures that each member votes the allowed number of times.

Nominal Group Technique

This technique is effective when trying to decide on highly controversial issues or when a team is stuck or in disagreement. Also this is a good tool to use when group members are unfamiliar with each other. This technique provides a way for everyone in the group to be heard, not just the one with the loudest voice or most aggressive personality.

In most instances you will have finished some type of multi-voting and have selected a group of issues. Now follow these steps.

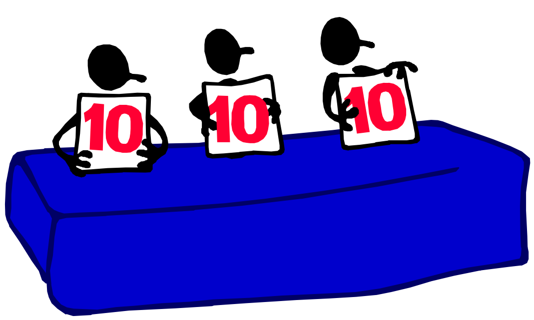
1 Provide each member with index cards (enough for all the issues). Example: 10 issues, 10 index cards.
2 Have each member write one issue (or correlating number) on an index card (continue until all issues have been recorded). Example: all members will have 10 index cards with an issue or number on each.
3 Now have each member review the cards and select the one issue that is most important to them. On the back of the index card write the number one.
4 Now have each member review the remaining cards and select the one issue that is least important to them. On the back of the index card write the number ten.
5 Continue this process until all ten index cards have numbers on the back.
6 Collect the index cards, group them by number and then categorize the issues by the number of votes received. Example: If issue 3 received the highest number of votes it is your number one issue and so forth until you have categorized all ten issues.

Consensus

A consensus decision is not a unanimous vote for an idea, majority vote, or achieving total satisfaction of all team members. Rather, it is an idea every team member:

- substantially agrees represents a common reality;
- sees as a fusion of the information, logic, and feelings expressed;
- is willing to accept; and
- believes is a workable approach that is in the best interest of the team.

In short, a team has reached consensus when each member can say "Even though the decision may not be exactly what I want, I can live with and support it." This does not mean that the entire team must completely agree with the decision but, rather, that everyone is in fundamental agreement. A consensus decision forces a team to consider all aspects of a proposition and hear all opinions as to possible courses of action. Differences of opinion are welcomed in order to obtain additional information, clarify issues, and to enable the team to see better alternatives.



Consensus

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Guidelines

A team leader facilitates consensus using the following steps:

1 Have team members clearly state their positions on an issue and, in good faith, attempt to persuade others to accept their point of few.
2 Conduct discussion and negotiation until all members have expressed their points of view.
3 Call for consensus. All members must say they are at least 80 percent in agreement with the proposition.
4 When the team reaches this level of agreement, all (100 percent of the team) must then commit to support the decision.
5 When this occurs, consensus has been reached.

How to Reach Consensus

A team leader can facilitate the process by:

- stressing the possible;
- defining underlying assumptions so they can be discussed;
- encouraging all members to offer ideas and question the ideas of others;
- avoiding early, quick, and easy agreements or compromises;
- encouraging creative discontent, channeling it toward the issue rather than group members; and
- being careful that meaningful differences are not smoothed over prematurely.

Briefing Checklist

Getting ready for a briefing could be time consuming and stressful. The following checklist should assist in making this process easier, organized, and better.

Before Briefing:

Step 1. Get briefing details (number of participants, time and place for briefing; arrange for room and/or equipment set-up.)

Step 2. Prepare and obtain approval of briefing materials.

Step 3. Verify that briefing contents are current, if necessary update.

Step 4. Make copies.

Step 5. Prepare briefing packets for participants.

Step 6. Prepare agenda

Step 6. Prepare name tags

Briefing Checklist

(Continued)

Day of Briefing:

Step 1. Set up computer equipment, if necessary.

Step 2. Test equipment.

Step 3. Set-up tables with briefing packets, notepads, pencils, and water.

Step 4. Prepare marquee board and position by elevators

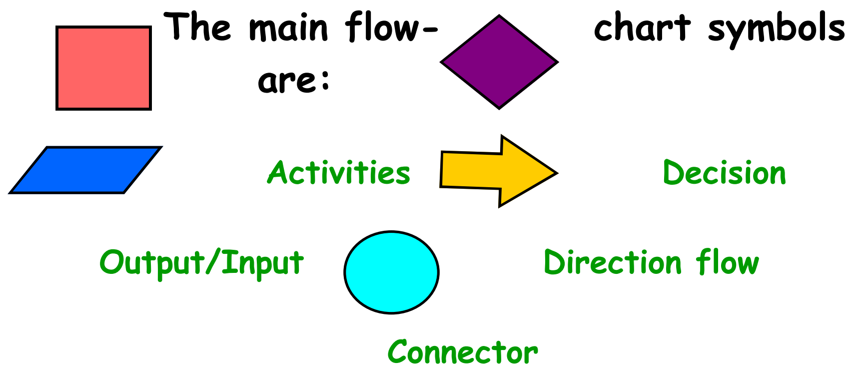
Step 5. Greet participants

Step 6. Convene briefing session

Flow Charting

Flowcharts and work-flow diagrams provide a picture of how a process flows. A top-down flowchart breaks the process into major steps, then shows the detailed flow within each major step. A flowchart can lead to process improvements by eliminating decision steps and activities. A work-flow diagram can be used to help organize a process into a smoother flow. A flowchart and/or work-flow diagram can also assist in looking at a process to identify non-value added steps that should be eliminated. The flow chart should identify what is actually needed within the process flow.

The main flow-chart symbols are:



The main steps to follow are:

1 Identify the major steps in the process.
2 Identify the substeps for each major step.
3 Identify the flowchart symbols for each step.
4 Complete the flowchart.
5 Test the flowchart.
6 Revise the flowchart as needed.

The Affinity Diagram

The Affinity Diagram combines Individual/Collective Group Brainstorming with a structured approach to displaying the ideas/products of the brainstorming according to common themes. These themes are then used by the Group as a basis for determining the avenues of investigation into the problem. The name of the process, Affinity Diagram, arises from the fact that all of the ideas/products within a theme have an "affinity" (or a relationship) to one another.

The Affinity Diagram is used when you need to identify the major themes out of a large number of ideas, opinions or issues. It groups those items that are naturally related and then identifies the one concept that ties each grouping together. It is a creative, rather than logical process, that produces consensus by sorting cards rather than by discussion.

Use When:

- Chaos exists.
- The team is drowning in a large volume of ideas.
- Breakthrough thinking is required.
- Broad issues/themes must be identified.

See next page for steps in developing an Affinity Diagram

Construction Steps

for the Affinity Diagram

1 **Assemble the Right Team**
Four to Six people - varied perspectives
Creative, open-minded members

2 **Phrase Issue to be Considered**
Broad, neutral statement - Clearly stated, well understood

3 **Generate and Record Ideas**
Follow guidelines for brainstorming
Record each idea on cards and flip chart
No cards with one word

4 **Randomly Lay Out Completed Cards**
On wall, table, flip chart, etc.

5 **Sort the Cards into Related Groupings**
In silence - No reaction - Quick process
If disagree - move cards, don't discuss

6 **Create the Header Cards**
Concise, no one word headers, make sense standing alone - Captures essential link in all ideas beneath it - Place at top of each grouping
Turn subthemes into subheaders

7 **Draw the Finished Affinity Diagram**
Draw lines connecting headers, subheaders with all the cards beneath them - Bring together related groupings - Review by the team - Review by important "non-team members"

Tips

for the Affinity Diagram

- Keep the team small.
- Make sure that ideas are clarified, NOT criticized during brainstorming
- Avoid one word cards; they are often ambiguous and cliches.
- Write clearly; large letters, using felt tip pens, if possible.
- Use flip chart to keep ideas visible as recorded on cards.
- Whenever possible, the statement should have a noun and verb in it.
- Don't agonize over sorting.
- Enforce the silence rule in sorting, discuss during creation of headers.
- Look within the grouping first for an appropriate header card.
- When one grouping is overwhelmingly larger than the rest, it needs to be reanalyzed. It likely contains a number of subheaders.
- Keep the number of headers between 5-10 in total.
- Keep the process moving.
- The "final" product should be reviewed by others and modified.

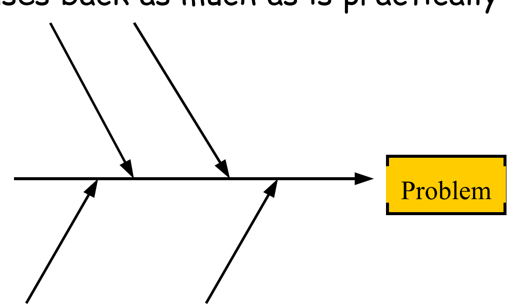
Cause & Effect

When you need to identify and explore and display the possible causes of a specific problem or condition, the Cause & Effect Diagram is used.

This diagram was developed to represent the relationship between some "effect" and all the possible "causes" influencing it. The effect or problem is stated on the right side of the diagram and the major influences or "causes" are listed to the left.

The Cause & Effect Diagram is used to illustrate the various causes effecting a process by sorting out and relating the causes. For every effect there are likely to be several major categories of causes. This approach often uncovers the root causes of a problem.

A well detailed Cause & Effect Diagram will take on the shape of fishbones and hence the alternate name Fishbone Diagram. From this well defined list of possible causes, the most likely are identified and selected for further analysis. When examining each cause look for things that have changed, deviations from the norm or patterns. Remember, look to cure the cause and not the symptoms of the problem. Push the causes back as much as is practically possible.



Cause & Effect

(continued)

The following steps are used to construct a cause and effect diagram.

1. Develop a statement of the problem. Write it down on the right side of a piece of paper (the fish head). Draw a central arrow across the middle of the page that points to the problem.

2. Brainstorm a list of possible causes of the problem. Write each of these down on another sheet of paper.

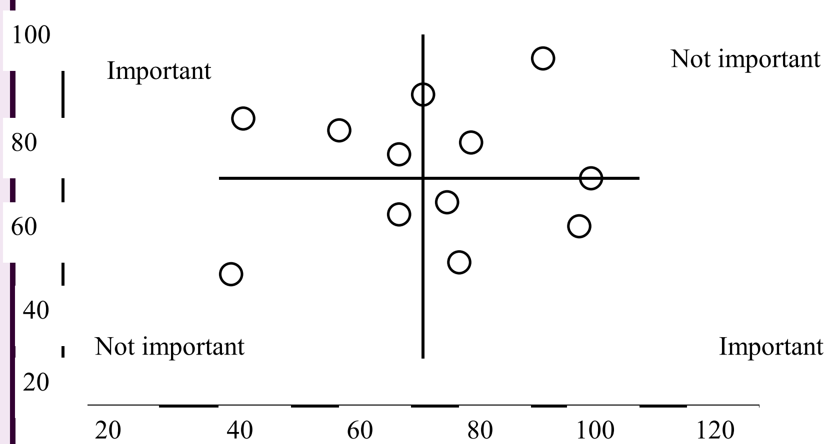
3. Review the list of causes and identify the major categories. Write down the names of the categories as main branches (fish bones) off the central arrow.

4. Review the causes and list each under the appropriate category. If necessary, revise or expand the list of categories.

5. Write down each cause as a small branch drawn off the main category branch for the category under which it falls.

Scatter Diagram

Scatter diagrams are useful when trying to determine how one variable relates to another. By plotting data on a scatter diagram, you can see if there is a relationship between variables. What kind of data do you use in a scatter diagram? It should be variable data which can be measured (i.e., time, length, temperature, etc.)



A scatter diagram is a graph where each plotted point represents two variables. The shape of the resulting scatter of points tells you if the two factors are related. If they are unrelated, the points will be randomly scattered around the graph. If larger values of one occur with larger values of the other, the points will group towards a line running from lower left to upper right; if larger values of one are associated with smaller values of the other, the points will cluster on a line running from upper left to lower right.

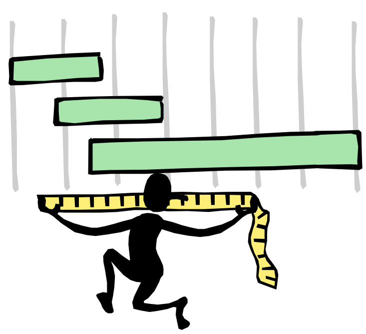
Strategic Planning

The purpose of a Strategic Plan is to provide a blueprint for success. The Strategic Plan sets basic strategic decisions derived from a comprehensive assessment of the current environment. It provides a high level view of the current environment and serves as a long-range guide while providing recommendations specific enough to support detailed planning.

A Strategic Planning Process may look like the following:

1. **Inform stakeholders of the strategic planning effort – create a process to involve managers and employees in developing goals and performance measures.**

a. Obtain staff cooperation and commitment
b. Obtain cooperation, commitment and top organization priorities from the agency Director
c. Explore external resources for access to high performing organizations – adopt successful strategies for defining structure and processes
d. Ensure link between strategic planning activities and any legislation activities
e. Identify participants for the "Leadership Team"



Strategic Planning

(Continued)

2. Conduct environmental scan – what does the future hold.

a. What will the organization look like 5 yrs from now?
b. What will the organizational structure be?
c. How will the process work?
d. How will the organization measure and reward performance?
e. What will the organization's budget situation be?
f. What do the customer's need/want?
g. What do the employee's need/want?
h. What legislative issues will the organization be facing?
i. What types of global issues will the organization be facing?
j What barriers should be anticipated?

3. Obtain input on mission, vision, goals from all members of the Leadership Team.

a. Develop questionnaire
b. Conduct one on one interviews
c. Compile results – determine common themes
d. Develop report outlining findings

Strategic Planning

(Continued)

4. Obtain input on mission, vision, goals from our customers point of view.

a. Review customer survey results and document high level findings
b. Develop a list of strategic focused questions
c. Develop a list of customer contacts (e.g., Advisory Committee)
d. Post questions on list-serves and web site to survey external customers
e. Use planned speaking engagements to conduct interviews/focus sessions with customers and stakeholders (Note: OMB clearance may be required.)
f. Analyze all input and document high level findings

5. Hold off-site with members of the Leadership Team to share findings in steps 2 – 4. Develop mission, vision, goals, objectives and measures based on internal employee surveys and external feedback.

a. Determine participants and speakers
b. Determine dates and times
c. Determine location
d. Finalize agenda
e. Hold facilitated session
f. Document results of session
g. Discuss results at next staff meeting
h. Draft all components of the strategic plan

Strategic Planning

(Continued)

6. Hold one day off-site with the Director and the Leadership Team to roll out plans to date, obtain input and commitment, finalize strategic plan components, brainstorm a list of strategies and initiatives.

a. Pre-brief the agency Director
b. Determine participants and speakers
c. Determine date and time
d. Determine location
e. Finalize agenda
f. Hold facilitated session
g. Document results of session

7. Present draft strategic plan components to employees for feedback

a. Brief and notify unions
b. Develop agenda (to include customer/employee survey results roll out)
c. Determine date, time, and location
d. Create e-mail address for comments by employees
e. Hold session
f. Document results of session
g. Collect all electronic input
h. Finalize input
i. Post findings on-line and share at staff meetings

Strategic Planning

(Continued)

8. Finalize plans and initiatives

a. Prepare final strategic plan
b. Evaluate list of initiatives – brainstorm
c. Identify top initiatives for action, ability to achieve goals and measures
d. Develop specific action plans for each initiative
e. Share initiatives and action plans with employees

9. Implementation

a. Begin implementation of all initiatives
b. Establish process for monitoring progress
c. Monitor and report results
d. Celebrate successes

The Leadership Team is generally composed of administrators, managers, supervisors, and union representatives.

Knowledge Cafe Activity

Set Up

Facilitator provides the instructions listed below to the participants. The participants will be seated in a cafe type setting, with four persons to each small bistro type table, or just seated in a small/tight circle of 4 chairs. The table will be covered with white newsprint type paper or paper napkins. this is for the participants to write ideas on. Markers will be provided at each table for each participant.

Guidelines

- Each room will have a thematic topic area;
- One facilitator per room;
- All participants in each room will be addressing the same theme, but may be discussing different questions;
- Facilitators will provide the instructions to the participants;
- Participants will work in groups of 4 (or 1 or 2 more participants, if there is an odd number in the room);
- All group members can record what is discussed. Each small group will answer assigned questions (possibly more than one group per questions);

Knowledge Cafe Activity

(continued)

- After 15 minutes 3 participants ate each Cafe table go to join another group. One participant remains to brief the new participants;
- No participant stays in one group more than twice;
- Only the host/hostess will remain behind at the same table for 2 rounds. The participant who stays has to brief the next group on what the last group has discussed;
- Participants are told that they have to go to a table with people that they haven't sat with before;
- The final recorder summarizes the work of all participants at that table.

Facilitator Directions for Knowledge Cafe

Round 1 Seek the Questions That Matter

- Have participants at each table briefly introduce themselves to other table mates and tell why they came to this cafe;
- Everyone at the table records - One of the participants will be chosen as the host/hostess of the table;
- Participants will talk about the questions that are assigned to this table. The questions will be written on a name tent in the center of the table;

Knowledge Cafe Activity

(continued)

- After 15 minutes the participants will conclude the discussion and choose a host/hostess to remain at the table;
- Everyone else (the other 3) travels to another table.

Round 2 Cross Pollinate and Link

- Have participants at each table briefly introduce themselves to other table mates;
- Everyone at the table records - You may be the host/ hostess of the table for the next round;
- Talk about the essence of the prior conversation at this table; give insights and deeper questions; link to other themes; develop solutions and examples for this question/theme;
- After 15 minutes the participants
- Choose a different host/hostess to remain at the table;
- Everyone else travels to another table.

Knowledge Cafe Activity

(continued)

Round 3 Probe for Deeper Context and Tangible Examples

- Have participants at each table briefly introduce themselves to other table mates;
- Continue to probe deeper into the questions, looking ways to make it actionable;
- Ask for more solutions and examples of possibilities; including insights, links to other themes, broader ideas;
- The host/hostess stays at this table;
- Everyone else returns to his or her Round 1 Table.

Round 4 Weave and Surface

- Everyone records ideas;
- Discuss everything that has been learned about the table theme from your tablemates as well as in your travels and from the visitors to your table. Gather the collective intelligence of the entire cafe around this question;
- Bring to the surface and describe the deepest shared meanings you have coroboratively developed around the theme/questions; what is most important to you and those with whom you interacted about it;
- Identify top three messages about this theme

Knowledge Cafe Activity

(continued)

Round 4 Weave and Surface (continued)

- Identify top three messages about this theme;
- Choose a spokesperson for your table;
- Cafe leaders facilitate sharing of table findings and weaving together the individual table threads into a tapestry of collective intelligence and shared meaning around the theme of the cafe; ensure that each table has a chance to report on its thoughts and ideas. Recorders will list all ideas for each question on flip charts.

Bibliography

Information in this ToolKit has been taken from different sources.

Elizabeth Rasmussen (Consultant)
NITSA Tools for Continuous Improvement
Office of Quality Management
Center for Quality Services