Introducing ICA’s Technology of Participation
Istanbul, Wednesday 17 July 2019
About me

CPF, Hall of Fame
England & Wales Chair
past Chair

CTF
past President

ToP Trainer
former Chief Executive
Session agenda

Introducing ICA’s Technology of Participation

• **Opening** reflection – Reviewing the past to prepare for the future & Building our Shared Vision

• **Presentation** – ICA, ToP values, methods & tools, practical examples, Q&A

• **Closing reflection** – your insights & applications

*Slides & further resources – martingilbraith.com #ToPfacilitation*
Opening reflection
Session agenda

Introducing ICA’s Technology of Participation

- **Opening** reflection – **Reviewing the past to prepare for the future** & **Building our Shared Vision**
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- **Closing reflection** – your insights & applications

Slides & further resources – [martingilbraith.com](http://martingilbraith.com) #ToPfacilitation
The Institute of Cultural Affairs

A global community of non-profit organisations ‘advancing human development worldwide’.
ICA’s ToP facilitation

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1. Rational & Experiential aims

Rational aim
• What does the group need to know, understand or decide?

Experiential aim
• What experience do we want our participants to have?
1. Rational & Experiential aims

This session

Rational aim

• To share & learn on the development of participation in our organisations

Experiential aim

• To inspire & enthuse to connect with each other & IAF, to promote the power of facilitation
2. Focused conversation - ORID
2. Focused conversation - ORID

**OBJECTIVE**
- **O**
  - SENSES
  - The Facts.
  - See, hear, taste, feel and smell.

**REFLECTIVE**
- **R**
  - HEART
  - Emotions and feelings stir, associations are made, memories rise to the surface.

**INTERPRETIVE**
- **I**
  - HEAD
  - Make conscious connections, thoughts and ideas form.

**DECISIONAL**
- **D**
  - ACTION
  - Consider actions, decisions, choices, what to do, how to respond, how to relate.
2. Focused conversation - ORID

**TOP: The focus or subject of the conversation**

**OPENING**
Welcome.
Context.
“Contracting” (setting up the norms of participation).

**RATIONAL AIM**
The intent or practical goal of the conversation. It guides the collective thinking process and determines the direction of the conversation.

**EXPERIENTIAL AIM**
The inner impact and overall experience of the conversation on the group. Affecting the mood of the group and the tone of the communication.

**CLOSING**
Thankyou.
Discuss next steps.
Agree any documentation.

**OBJECTIVE**
Objective level questions
- To engage the five senses (sight, sound, taste, smell and touch)
- Invites inclusive participation and focuses attention
- Gets out the facts and objective data

**REFLECTIVE**
Reflective level questions
- To elicit and acknowledge imaginative, intuitive and emotional responses
- Acknowledges emotions, memories and initial associations
- Invites participants to use their imaginations

**INTERPRETIVE**
Interpretive level questions
- To elicit ideas, relationships and logical connections
- Builds collective consciousness and shared awareness within the group
- Identifies available options within the group

**DECISIONAL**
Decisional level questions
- To develop depth level collective opinions or resolve that may lead to future action
- Draws out the deeper meaning
- Makes conversation meaningful and relevant to the future
- Exposes individual and group choice
2. Focused conversation - ORID

**Opening reflection**

- **What did we do** - what steps did we take in each workshop?

- **What surprised you?** What was easy or difficult? Enjoyable or less so?

- **What was different** to other workshops in your experience? What was effective, or less so?

- **What questions** were raised for you about facilitation?
3. Historical Scan (ORID)
3. Historical Scan (ORID)

**Participation in our organisations**

- **What events** did you write or read? What questions of clarity do you have?
- **What intrigued you** to know more? What stories would you like to hear, or share?
- **What trends** can you discern over time?  
  **What impacts** can you discern between levels?  
  **What can we learn** about the development of participation in our organisations
- **What outstanding questions** do you have?
4. Consensus Workshop
4. Consensus Workshop
4. Consensus Workshop

**FOCUS QUESTION:** The question to which the workshop content and product are a response.

**CONTEXT**
Set the Stage
1. State the purpose or aim of the workshop.
2. Clarify the Focus Question.
3. Briefly outline the process and time frame.
4. Lead the group in talking about the topic for a few minutes using a short Focused Conversation.

**RATIONAL AIM**
What the group needs to KNOW - the product or decision (See page 40).

**EXPERIENTIAL AIM**
How the group needs to BE by the end of the workshop (See page 40).

**RESOLVE**
Confirm the Resolve
16. Focus the group on this consensus by reading all the title cards.
17. Discuss the significance of the consensus.
18. Create a chart or visual image to hold the consensus (optional).
19. Discuss next steps and implications.

**BRAINSTORM**
Generate new ideas
5. Individually list answers to the Focus Question.
6. Select best ideas and write on cards individually or in teams.
7. Pass up first round of cards. Ask for the clearest cards.
8. Ask for questions of clarity.

**CLUSTER**
Form New Relationships
9. Have the group form 4-6 pairs that clearly go together.
10. Ask for 2nd round of cards. Ask for cards that are different, then develop clusters.
11. Quickly give each cluster a symbol/tag.
12. Mark remaining cards with symbol/tag and pass up.

**NAME**
Discern the Consensus
13. Talk through the largest cluster first.
14. Give the cluster a 3-7 word name or title which answers the focus question.
15. Repeat for the remaining clusters.

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<td>7-20 mins</td>
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5. Participatory Strategic Planning (PSP)
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Six practical examples

1. 15 minute conversation of 6-18
2. One hour twitter chat of 40
3. 90 minute World Café of 60
4. Half-day consultations of 20-25
5. One day team Away-Day of 12
6. Five day team planning for 36
1. 15-minute conversation of 6-18

What do facilitators do?
Facilitation training in Brussels

- What do you recall from the clip - words or phrases, images, characters, music, etc.?
- How did you react - surprised or intrigued, familiar, reminded of experience?
- So what - how relevant are the metaphors, what insights could you apply, what would you add, learn or practice?
- What next – what will you do differently as a result of this conversation?

http://martingilbraith.wordpress.com/2013/12/18/three-dimensions-of-the-facilitator-role-a-focused-conversation/
2. One-hour twitter chat of 40

Facilitating a Diverse Group of People twitter chat

3. 90-minute World Café of 60

Exploring our research experience and interests

Science in Culture
Exploring the reciprocal relationship between the sciences and the arts and humanities and encouraging cross-disciplinary innovation

- What are some highlights of our own research relevant to Science in Culture?
- What are some exciting emerging themes and questions?
- What are some new opportunities for mutual support & collaboration
- What are implications for researchers and for the Research Council?
4. Half-day consultations of 20-25

Clinical Leadership Evaluation & Development with South Manchester Primary Care Trust

- **Opening & introductions**, overview, ‘prouds & sorries’ & expectations
- **Historical Scan** to map together the development of clinical leadership in the PCT
- **Analysis of factors affecting** clinical leadership development – what’s worked and what’s not
- **Brainstorming of actions**, dot voting recommendations, next steps & close.

5. One-day team Away-Day of 12

Staff team Away Day with George House Trust

- **Opening**: aims & process, expectations & ground rules, introductions
- **‘Wall of Wonder’**: historical scan – our shared journey
- **World Café**: how we would like to be able to describe the culture of GHT
- **Team-building exercise & next steps**

http://martingilbraith.wordpress.com/2014/01/16/facilitation-case-study-staff-away-day-with-george-house-trust/
6. Five-day team planning for 36

Annual planning week of an international humanitarian agency in Geneva

- **Opening & overview**, historical scan, strategic context, mission & values
- **‘Practical Vision’** of the desired future in 3 years time
- **Obstacles & resources**, 3-year strategic directions & policy implications
- **Year 1** SMART Objectives & **Quarter 1** operational plans

http://martingilbraith.com/2014/04/04/transformational-strategy-from-trepidation-to-unlocked/
Example 6 in-depth - PSP

- established 1998 by NRC with UN General Assembly mandate
- evolved into conflict & natural disaster, monitoring & advocacy
- 35 staff in Geneva, Director & many new
Preparation & design

- Consultation visit, early September
- Contracting:
  - context & challenge
  - proposed approach
  - aims & design
- Regular skype calls with design team
- Venue & catering, equipment & supplies
The challenge

- IDMC annual staff ‘Planning week’, 14-18 October in Geneva
- to embed 2011 change & restructuring
- to respond to changing environment
- to capitalise on fresh opportunity for new start - ‘IDMC v.2’
Proposed approach

- **ToP approach & Participatory Strategic Planning method**
- **Not comprehensive but sufficient**
- **Inclusive & appreciative**
- **Forward-looking & intentional**
- **Transparent & accountable**
Rational & Experiential Aims

1. Clear and shared understanding of strategic environment & journey of change and implications
2. Clear and agreed institutional strategic framework - Mission, Values, Vision, Strategies, SMART Objectives and Operating Principles
3. Contribute to resolving ‘vital questions’ of IDMC strategy & policy
4. Departmental and inter-departmental operational plans for the first quarter, plus regular review
5. To build shared commitment, confidence and trust for a new way forward together.
# Design for the week

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<td>Mission &amp; Values and PSP Focus Question – ToP Focused Conversation</td>
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<td>Strengths and resources – carousel brainstorm</td>
<td>Implications: donor commitments – ToP Focused Conversation</td>
<td>Operational plans – ToP PSP workshop Close</td>
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SMART Objectives – ToP PSP workshop
IDMC’s Journey of Change

Historical Scan
Current Strategic Context

Wave exercise
PSP Focus Question

Focused Conversation

“How can IDMC strengthen its unique role as a global monitor and evidence-based advocate, to best contribute to prevention, protection during, and durable solutions for people affected by internal displacement?”
Practical Vision

“What do we want to see in place 3 years from now as a result of our work?”
Underlying Contradictions

“What is blocking us from moving towards our vision?”
Strengths & Resources

Carousel brainstorm

“What strengths and resources do we have to address the blocks to our vision?”
Strategic Directions

“What practical actions will address our blocks and move us toward our vision?”
Our implementation vehicles

Group creativity exercise

“If our implementation plan were a fantasy vehicle, how might it look?”
Focused Implementation

“What will be our ‘SMART’ accomplishments for the first year?”

“What implementation steps will be required in the first Quarter?”
First Quarter review

- Overview
- Strategic review – World Café
- Operational review
- Revise SMART Objectives
- Draft Quarter 2 Operational Plans
- Reflection & close.
Feedback

Alfredo Zamudio, Director

“Our planning week has always been faced with some trepidation, but this year IDMC was able to really ‘unlock’. We were amazed with what we managed to achieve by the end of the week.”

Clare Spurrell, Head of Communications

“From beginning to end Martin had a very clear methodology. The planning week was a learning experience, very inclusive of all participants. The extensive documentation has been essential for our work.”
If you don’t have 5 days...

edventure: Frome

• 3 workshops in 1 long day - vision, contradictions, strategic directions
• Brief review of context, mission & values first
• Implementation planning by staff team later

• 15 participants – three part-time staff, volunteer Board, local stakeholders
• Experienced ToP PSP facilitator on staff
• Lower stakes, less complex, less contentious
If you need 5 months...

Oxfam Lebanon ‘One Country Strategy’ process

- Complex and demanding change in a complex and demanding environment
- 150 diverse stakeholders: affiliates, teams, locations

Three phases:

- Orientation, consultation & design
- World Café consultation; Vision, Contradictions & Strategic Directions
- Implementation planning & capacity-building

If you need a whole year!

2017-18 planning process:

- **April** GA Members’ day – indicators of success workshop & World Café brainstorm
- **May-June** online survey - brainstorm
- **June** Secretariat & Board Away Days – 2-day ToP PSP process
- **Nov-Dec** consultation on first draft
- **March** comments on final draft
- **April** adoption at GA

Eurochild Strategic Planning

“How could Eurochild best mobilise and add value to the work of its members from 2019-21, to promote the rights & well-being of children & young people in Europe?”

ToP books from ICA Canada
ToP training, IAF-endorsed

‘ToP Facilitation Essentials’

2019 in Brussels & London
Closing reflection

Our session today

● What were any key insights for you?

● How do these relate to your own experience & practice?

● What can you take away and apply?

● What outstanding questions do you have?