Affinity Diagram

Goals

A) To help gather and sort information in an organized manner and aid in the decision-making process, thereby shortening the time it takes to come to consensus.
B) To help identify the relationships/associations between similar threads of thought.
C) To help sort issues facing the group/organization.
D) An organized way for a group to brainstorm causes, effects, barriers, benefits, pros/cons, and/or solutions throughout the change process, or to discuss/review learning content.

Procedure

1. Divide the group into subgroups of 3-7 people. Ask a guiding question from the list at the end of the book or choose a question of your own. Ask the whole group one question or give each group a different question.
2. Hand each group a large sheet of paper.
3. Hand each participant three sticky notes™.
4. Have the participants silently brainstorm ideas related to their question.
5. Have each participant write three of their brainstorm ideas using different sticky notes for each response.
6. Have each participant place their sticky notes randomly on the corresponding chart papers.
7. Assign members of each group to silently organize the sticky notes™ by similar threads of information.
8. Ask group members to identify the main ideas and place all the sticky notes on a particular topic in a vertical column on the chart.
9. Repeat step 8 until all sticky notes™ are placed on the chart by similar threads of information.
10. Have group members label the main idea for each thread with a sticky note™.
11. Choose a speaker to share the information on the chart with the other groups.
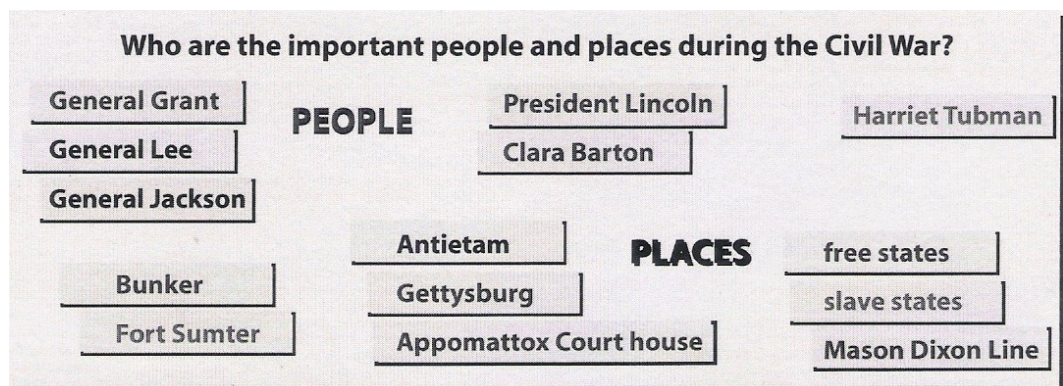
Group Size
3-50

Sample Stakeholder Use

A classroom teacher might use this process for students to review content learning. For instance a history teacher could ask students to identify important people and places during the Civil War. After the activity, the teacher could have the students explain why they were important.
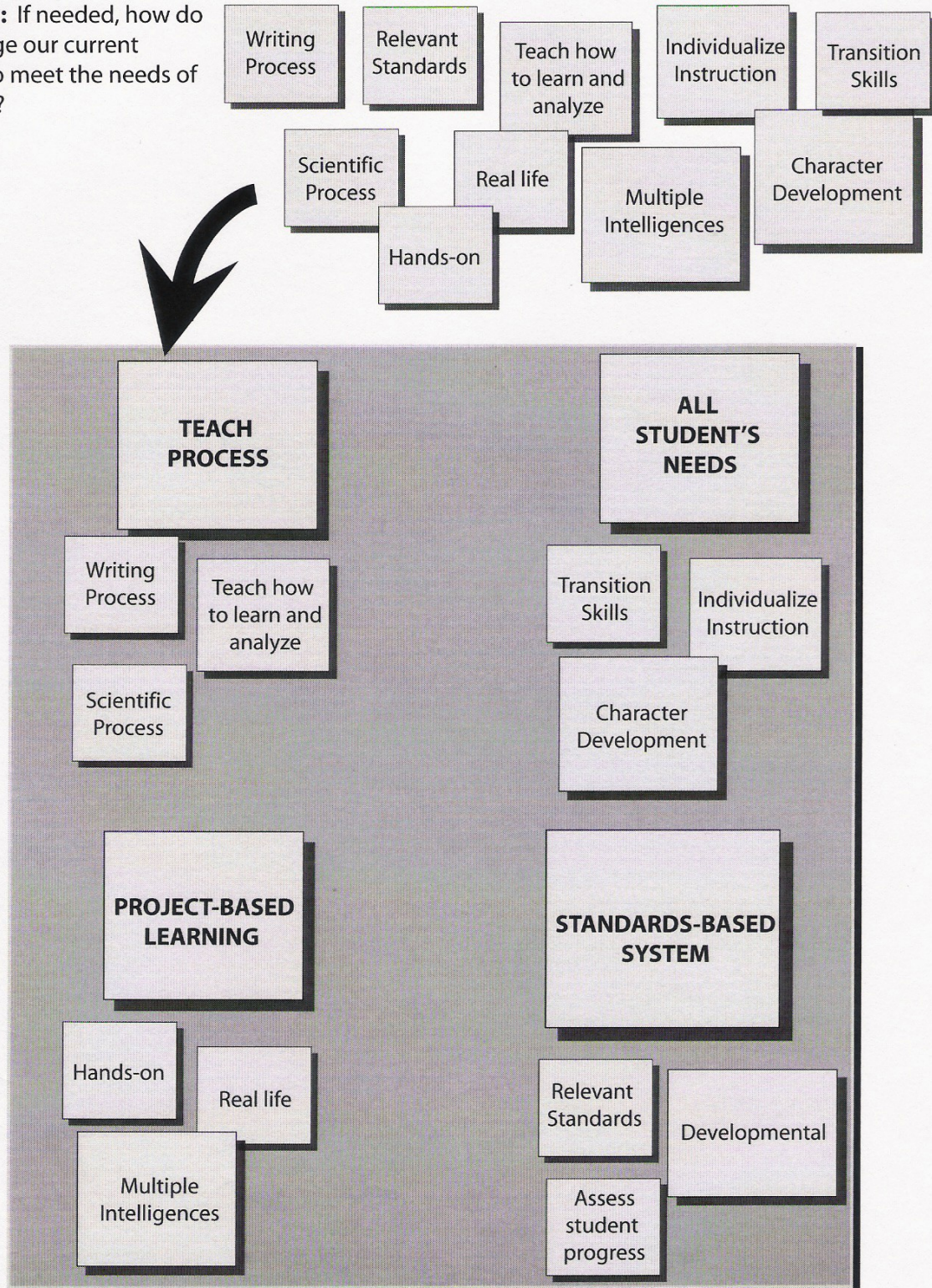
Example

Who are the important people and places during the Civil War?

PEOPLE		
General Grant	President Lincoln	Harriet Tubman
General Lee	Clara Barton	
General Jackson		

	PLACES	
	Antietam	free states
Bunker	Gettysburg	slave states
Fort Sumter	Appomattox Court house	Mason Dixon Line

Duration
20-45 Minutes

Affinity Diagram Example

Sample Stakeholder Use: Administrators may use the Affinity Process during planning sessions, teacher inservices, or parent/community meetings to discuss issues or concerns.

Example: If needed, how do we change our current system to meet the needs of students?

Writing Process

Relevant Standards

Teach how to learn and analyze

Individualize Instruction

Transition Skills

Scientific Process

Real life

Multiple Intelligences

Character Development

Hands-on

TEACH PROCESS

Writing Process

Teach how to learn and analyze

Scientific Process

ALL STUDENT'S NEEDS

Transition Skills

Individualize Instruction

Character Development

PROJECT-BASED LEARNING

Hands-on

Real life

Multiple Intelligences

STANDARDS-BASED SYSTEM

Relevant Standards

Developmental

Assess student progress

Consensogram

Goals

E) To anonymously determine a group's level of knowledge or commitment.
F) To quickly assess a group's knowledge or commitment.
G) To assess agreement/discord within group anonymously.
H) To discuss/review learning content.

Procedure

1. Choose a question from the stakeholder questions at the end of the book for develop a question of your own.
2. Hang a large chart on the wall with percentages in a column on the left hand side of the chart in increments of 10 to 100. A variation of this activity would be to use numbers 1-10.
3. Hand each participant one sticky note™.
4. Ask the question to the group. Give time for them to reflect on the question.
5. Give examples of what 90%,50%, or 30% commitment or knowledge would look like (Le., 90% means I'm very committed, but think I will need to fully commit. 30% means I'm have very little commitment and would like to consider more options.)
6. Instruct the participants to write a number from 10% to 100% (or numbers 1-10) that corresponds with the level of commitment/knowledge to the question on the sticky note™.
7. Have each participant turn their sticky note™ face-down so their score is not visible.
8. When all participants are ready, ask one or two people to gather the sticky notes and place them on the chart beside the percentage number in a row.
9. Discuss the spread of votes. Discuss where the majority of votes were placed as well as the ones at the bottom of the chart.
10. Have the group reflect on what the chart tells them and on what the group needs to consider in making a decision on this matter.

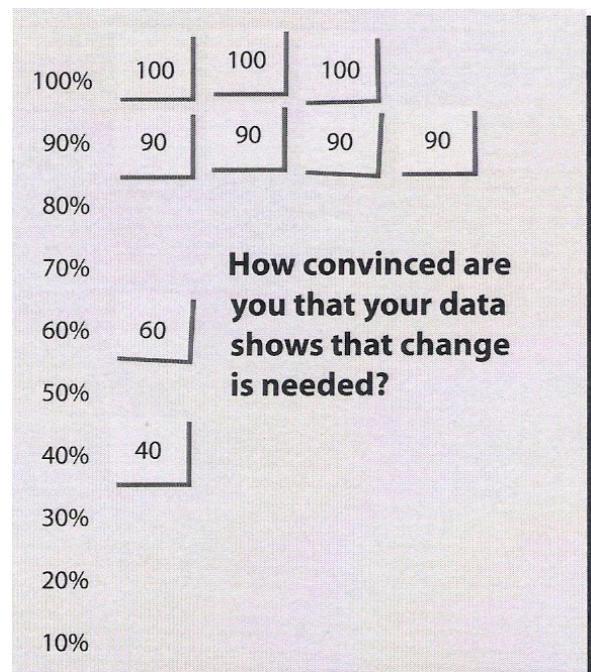**Group Size**
3-50

Sample Stakeholder Use

A teacher may use the Consensogram activity to get students' opinion on their comfort level when using the math problem solving steps process. They may ask a question like, "How comfortable are you with the problem solving steps?"

Example

At a staff meeting, the leadership team may use the Consensogram to determine the level of commitment to a proposed change.

Duration
5-10 Minutes

100%	100 100 100
90%	90 90 90 90
80%	
70%	**How convinced are you that your data shows that change is needed?**
60%	60
50%	
40%	40
30%	
20%	
10%	

Basic Flow Chart

Why

Rationale/Purpose/Goal - Flow charting is process students and teachers can use to graphically display a process, plan, complex concept or show relationship paths from part to the whole. Within the creation of a flow chart, students can incorporate other processes such as affinity diagrams, power voting and consensogram.

What

Description of the tool: They are easy to follow therefore we can use them for many purposes: to define the boundaries of a process, to form a common definition of a process, to provide insight into how a process could be improved, to capture the memory and prevent the process from having to be reinvented.

How

Procedure/ Materials

Steps
- o Name the process or concept to be charted and write it at the top of the chart paper.
- o Develop an intent or purpose statement for the process and write it under the title.

Who

When

Where

- o Define the boundaries and level of detail this particular flow chart will attempt to demonstrate.
    1. For example, the steps to follow in finding a GCF *OR* the steps to follow in order to solve an interpersonal conflict within the confines of a team or group activity.
- o Have the students either observe the process and write the steps on sticky notes or brainstorm the steps and teacher can facilitate the visualizing of the process.
- o Use simple symbols to construct the flow of the process or relationship by placing sticky notes in the process.
- o Connect the symbols with a line. Each line has an arrow pointing to the following step symbol in the process.
- o Check for accuracy, completeness, consistency and detail.
- o Study the flow chart and determine how where and when the process can be improved or the relationship could be strengthened and reinforced.

Comments:

Clock Appointments

Goals

I)   To quickly form partners to facilitate group discussion.
J)   To help members work with new partners in an anonymous way.

Procedure

1. Ask participants to draw a large clock on a sheet of paper or pass out blank clock sheets.
2. Participants walk around to other group members and "set appointments" exchanging names and filling in each other's names in corresponding hours on the clock.
3. In groups of less than 12 people, have the members set appointments for the even numbers on the clock or the quarter hours (3:00, 6:00, 9:00, and 12:00).
4. During discussion times in the work session, the facilitator names an hour.
5. Each member meets with the person set for that appointment time.
6. After the discussion, allow time for sharing with the whole group.
7. Choose a different appointment time for each discussion.

Group Size
2-24

Sample Stakeholder Use

During discussion times in an Educational Advisory Committee meeting, the group can use the clock activity to discuss various agenda items such as the school calendar. In the classroom, teachers may use the clock activity to encourage students to discuss topics with a variety of classmates.

Example

Staff can use this activity when discussing topics posed at a staff meeting such as:

- Problems facing the group/organization
- Causes and solutions
- Barriers to change
- Benefits to change Timelines

Sample: Setting an Appointment
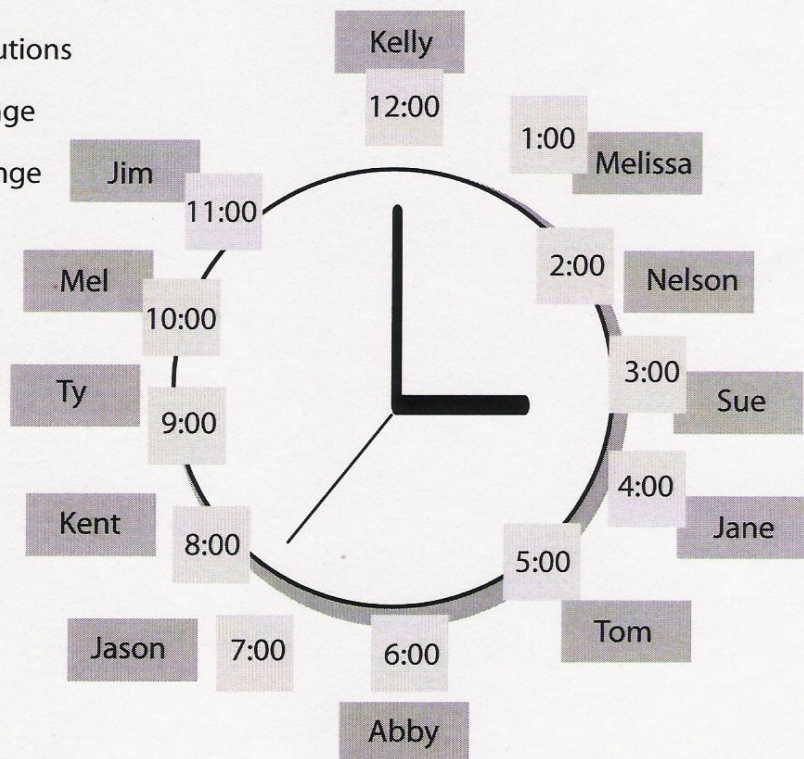
Duration
10-15 Minutes

Parking Lot

Goals

- o To help groups realize the change process has highs and lows.
- o To give members an opportunity to voice opinions in a positive way.
- o To identify constructive ways to improve or express lessons learned.
- o To give group members an opportunity to comment, ask questions, or request information that is off the current subject or task without interrupting what is presently going on.
- o To suggest ideas for improving the work session or activity.

Procedure

1. Hang a large sheet of paper divided into four boxes. Write the titles Plus (+), Delta (Δ), Questions (?), and Ideas ($\mathbb{Q}$) in the corresponding quadrant.
2. Hand out 5-8 sticky notes™ to each participant.
3. Explain the goals of the chart and review the meaning of each quadrant.
4. Encourage members to add to the chart at break times or as needed by writing their questions and comments on the sticky notes™ and adding them to the chart.
5. During the work session or during the break times, check the chart and remove the sticky notes™ that will be answered after the break or during the following activity. Find a time to answer/comment on each sticky note at some point. Relay the information to group as a whole, unless specific instructions on the sticky note™ are given. Allow of anonymity or individuality to better suit the needs of the group.

Group Size
3-50

Sample Stakeholder Use

Example

A classroom teacher could use the Parking Lot to help meet the academic needs of her students. Student understanding of content learning can be informally monitored to aid in individualizing instruction.

A class may use the Parking Lot during a cooperative learning activity.

Duration
Throughout the duration of the session, meeting, or activity.

Plus + What went well?	Delta △ What area(s) are opportunites for improvement or growth?
We learned to work together	We needed to establish roles
Questions (?) What questions do you have?	**Ideas (I)** What ideas do you have for improvement?
We were wondering about...?	I think that if we...

Capacity Matrix

Why   Using a capacity matrix allows students to self assess and monitor their own progress toward a learning goal.

What   A tool for students to self-monitor their progress to reach goals, standards, or benchmarks.

How

Capacity Matrix always starts with the learning target and unpacks the skills and knowledge needed to master the learning target. Create a graphic that allows students to graph their level of proficiency from lowest (1) to highest (4). Using data, let students fill in as they become more proficient. Sample capacity matrices will be included on the wiki for each learning target to use as a model.

Example

Example: **Capacity Matrix: Story Retell**

1 **Emerging** I can show what I learned with help.	2 **Partially Proficient** I learned the simple parts.	3 **Proficient** I learned the simple and complex parts and can demonstrate them.	4 **Advanced** I can use what I learned in a new way.
I can retell a story, including all of the parts found in the checklist.			

Five Whys

Goals

K) To find the moral purpose and bring a deeper understanding of why something is or is not important.
L) To help groups determine the root cause of a problem or an issue.
M) To cause people to challenge their current situation or problem.
N) To discuss classroom conflicts.
O) To discuss/review learning content.

Procedure

1. Choose a guiding question from the list at the end of the book or choose a question of your own.
2. Hand out a sheet of paper to each individual.
3. Ask "Why?" this particular condition exists. Allow time for the participants to reflect and write their answer.
4. After asking "Why?" and responding in writing five times, have volunteers share their responses with the group.
5. Have the group reflect on what the group needs to consider or what action may follow.
6. This activity may be done individually or in partners.

Group Size
3-50

Sample Stakeholder Use

A counselor or classroom teacher may ask students a question like, "Why is goal-setting a needed skill to possess?" Students reflect and then write five responses to the "why" questions. Students may volunteer to share with the class. A teacher may use the 5 Why Process to discuss a conflict between students by asking a question like, "Why did you mistreat Johnny?"

Example

At a community meeting, stakeholders are asked why having a Shared Vision is important.

Duration
10-15 Minutes

SAMPLE

1. Why is a Shared Vision important?
Answer: It is important so that everyone is working together on the same goals.

2. Why is everyone working together on the same goals important?
Answer: It is important so that we can accomplish more.

3. Why is accomplishing more important?
Answer: It is important so we can achieve quicker results.

4. Why is achieving quicker results important?
Answer: It is important so we can move on to other goals.

5. Why is moving on to other goals important?
Answer: It is important so that we can improve the quality of education for our students.

CRIS Process

Goals

P) To assess strengths and identify opportunities for improvement individually, within a group, and/or as an organization.
Q) To help a group articulate and assess the effect of a situation or task on individuals, a group, and/or on the organization.
R) To help a group clarify a current situation and determine if change is beneficial to the individuals, group, and/or the organization.
S) To help a group determine the effectiveness of continuing with the status quo.
T) To discuss/review learning content.

Procedure

This tool may be used for a variety of purposes.
1. Choose a challenge facing the group or a proposed change.
2. Write the problem or change at the top of the chart.
3. Have the group restate the task in their own words.
4. Ask a question like, "How does this affect you?"
5. Ask a question like, "How does it affect our school, our students, our community, etc.?"
6. Have the group share with a partner. Ask volunteers to share with the large group.
7. Discuss next steps.

Group Size
3-150

Sample Stakeholder Use

When teachers are considering changing to a Standards-Based System they may be considering the ramifications of changing from grades to levels to developmental levels Uses: so that students will receive appropriate instruction. They could use the CRIS Process to work through their concerns.

A staff may use the CRIS Process to consider adopting Standards-Based Assessments.

Example

the task	State what you are to do or consider. Should we begin using Standards-Based Assessments?
Individually	**How does this affect you?** I will need to use the Standards and Assessments to drive instruction.
on your system	**How does it effect your organization?** It may improve instruction and positively impact student learning opportunities. We will need to work through concerns our stakeholders have by including them in the decision making process.
with your partner	To be shared with the leadership team.

Duration
20-45 Minutes

CRIS Sheet

Clarify the task	State what you are to do or consider
Reflect individually	How does this affect you?
Impact on your system	How does it effect your organization?
Share with your partner	

QUAD RESPONSE or LACI

Name :_____

Learnings	Application
Challenges	Improvements

PDCA-Plan, Do, Check, Adjust

Goals

U) To help set goals, establish steps to achieve goals, assess the success of the steps, and reflect on how the plan could be made more effective.
V) To identify constructive ways to improve or express lessons learned.
W) To establish a formal Continuous Improvement Process that can be used with all stakeholder groups.

Procedure

1. Identify a goal the group or individual wants to accomplish. Ask the following questions regarding the goal:
   o Is my/our goal specific?
   o Is it measurable?
   o Is it aligned (i.e. to standards, action plan, teacher evaluation tool, etc.)?
   o Is it result oriented?
   o Is it time bound?

Group Size
3-50

2. Determine a comprehensive plan describing your action steps to achieve your goal.
3. Identify ways you will implement your plan. Ask yourself the following questions:
   o What is the timeline?
   o What roles are needed to accomplish this task?
   o What are the responsibilities of these roles?
   o How regularly will you need to work at your plan?
   o How will you motivate yourself to complete your plan?

Sample Stakeholder Use

4. Identify the evidence that will be reviewed to document progress towards the goal. Ask the following questions:
   o How is the plan you developed working?
   o How do you know if your plan has been successful or not?

Example

5. Determine what changes will help attain the goal and ensure a systematic implementation. Ask the following questions:
A) What worked well in your plan?
B) What do you see as an opportunity for improvement?
C) What can you do to make it more effective?

A school district may use the PIER Process as a professional development goal-setting process with all staff. Districts might request PIER Plans tied to teacher, principal, and paraprofessional evaluation tools. They might also use the PIER Process to develop an action plan as a systematic Continuous Improvement Process.

Duration
30-60 Minutes

Adapted from: Reinventing Schools Coalition

PDCA-Smart Template

Authors_____

School_____

Date goal was written_____

Smart Goals	Plan	Implement	Evaluate	Refine
Goal	Comprehensive plan overview with input from appropriate stakeholders	Timeline with concrete roles and responsibilities	What evidence will be reviewed to document progress toward goals?	What changes will help goal attainment & insure systematic implementation?
Is your goal SMART? Specific Y___N___ Measurable Y___N___ Aligned Y___N___ Results Oriented Y___N___ Time Bound Y___N___				