

SAMPLE

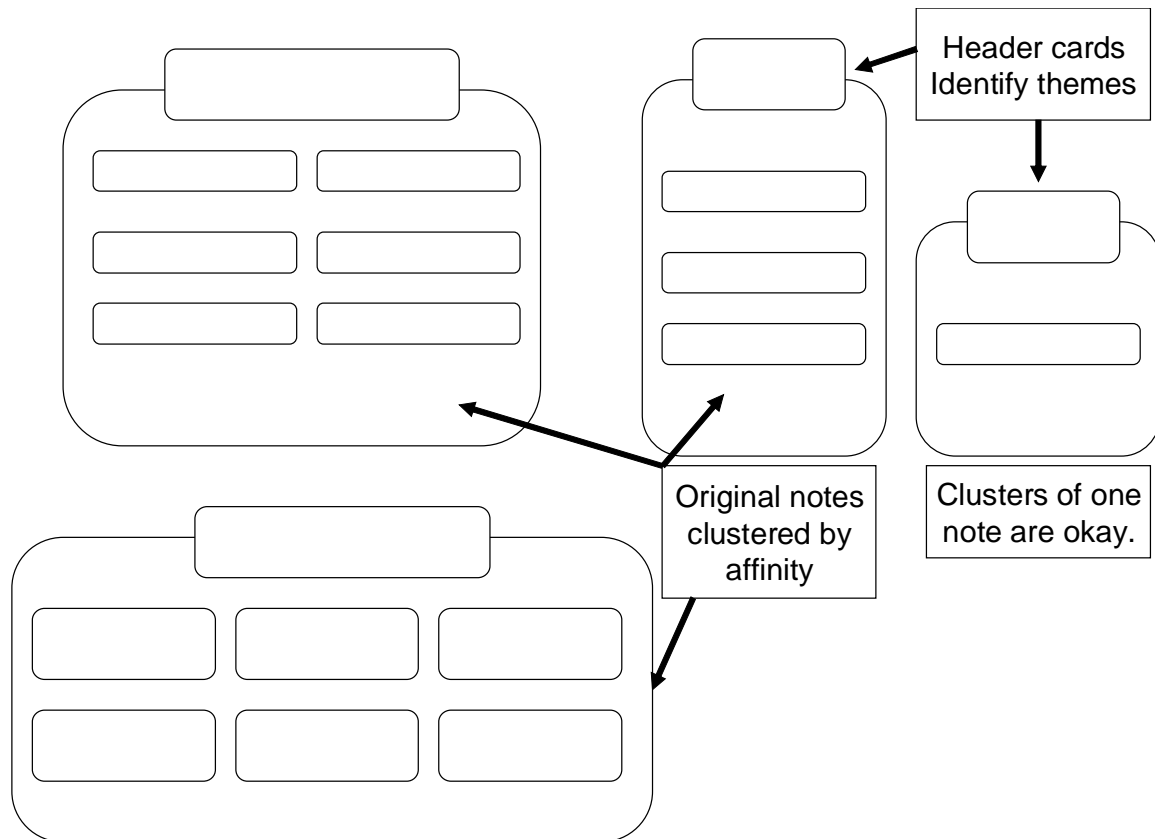
TOOL #3:

AFFINITY

INTRODUCTION:

This is a collaborative planning and problem-solving tool that helps teams categorize many ideas in a way that minimizes conflict and creates a structure for organizing and prioritizing their work..

Affinity Diagram Template



DESCRIPTION:

The affinity process is a great tool for making sure that all members of a team have input into the resolution of a problem or the development of a solution. It's particularly useful in situations where potential conflicts may occur or if there are one or two members of a group that either tend to dominate a conversation or who tend not to participate in conversational situations. Because the early stages of the process are done independently and then silently, the organizational structure that emerges is a compilation of all team members' thinking as opposed to a preconceived notion about the way it should be or always has been done. What the team eventually ends up with is a more creative, atypical approach to solving the problem.

CHECKLIST OF SUPPLIES:

You'll need the following supplies on hand to conduct your affinity process.



- 3 X 3 PostIt™ Notes
- 3 X 5 PostIt™ Notes
- Chart paper
- Pens or Pencils
- Markers

You'll also need enough open wall or table space for posting the team's responses and enough physical space for people to view and work with the ideas in groups.

HERE'S HOW IT WORKS:

STEP 1: Make sure everyone knows and agrees on the “presenting question” about which they will be generating ideas. This question should have a single focus.

STEP 2: Review guidelines for the process...

- Everyone participates
- Write clearly and legibly
- Keep idea statements short and focused on a single point
- No talking during the silent grouping exercise
- It's okay to move ideas around from one category to another during the silent grouping exercise
- Once talking is allowed, it's okay to reorganize or add ideas into existing categories.

STEP 3: Individually, team members brainstorm as many ideas as they can think of in response to the presenting question (refer to the brainstorming guidelines). During this time, each person records their ideas by writing one idea per 3 X 3 PostIt™ note. After about 5 minutes, individuals randomly distribute their ideas in a common area. (E.g. On chart paper or white board)

STEP 4: All team members then *silently* group ideas into like categories.

STEP 5: Once the whole group appears to have settled on a common schema for categorizing the ideas, participants discuss and name the categories, using 3 X 5 PostIt™ notes as header cards. There may be ideas that don't fit neatly into any category. These are “outliers” and are placed in a “miscellaneous” grouping for later consideration.

STEP 6: Use a multi-voting technique to prioritize the categories. Refer to page 92 in *The Handbook for SMART School Teams* or visit your ToolKit on Decision-Making for how to conduct a multi-vote.



VIEW THE DVD

This clip explains and illustrates the basic elements of the affinity process. View it as a team, then give it a try!

CREATE A GREAT PRESENTING QUESTION:

If the presenting question is not precise or clear, the responses generated in the affinity process will be vague and too broad to be useful. The trick to creating a great presenting question is to make sure that there is balance between precision and opportunity. The question must leave room for multiple answers, solutions or ideas yet, be precise enough so that everyone is answering the same question.

Example #1: *What issues do we face as a team?*

This question is too wide open. It might be interpreted as interpersonal issues among team members, or as external barriers facing the team or it could even mean issues surrounding the academic performance of team members' students. If the question is meant to assess a team's functionality, a better question might be, "What interferes with our team's effectiveness in achieving our objectives?"

Example #2: *What do our students struggle with most?*

This question narrows the field of possible answers because it focuses on the students but it also leaves lots of room for interpretation. The team may want to talk first about whether to include only academic and behavioral issues as opposed to social, emotional or family concerns over which they have little control. If, however, it's early in the year and the team is just starting to get to know the students in their classes, they may want their first affinity process to be this broad. Decide how you'll use the information you gather. That should help determine whether you remain open-ended or narrow your options as you refine your presenting question.

ACTIVITY:

To test your presenting question, have your team members individually complete the worksheet provided in the packet. This can be done in preparation for your meeting or during the meeting. Then compare responses and discuss the similarities and differences. Select one question to use in your Affinity process or combine features of several questions to create a new, team question.



ALTERNATIVE APPLICATIONS:

- If you have a large number of people, conduct the affinity process in smaller groups simultaneously, focusing on the same presenting question. Chart the categories that emerge from each group, looking for and noting duplications and patterns. This will indicate a broad-based concern across the larger population of participants.

- If you have more than 6 but less than 12 people, have all people participate in one round of brainstorming. After all the notes are posted, split the participants into two smaller teams to conduct the silent grouping exercise. One team of 5 or 6 starts the grouping process while the other either takes a break or observes. After 5 minutes, the second team continues the process until they are satisfied with their results. Have the entire team name the categories.

Participant Worksheet

Affinity

Evaluating your presenting question for the Affinity Process.

1. What is the primary focus of your question / concern? (E.g. Student achievement, school culture, student behavior, etc.)
2. What do you want to find out about your primary focus? (E.g. Why does this issue or problem exist? What is the impact of this problem on the school? What might be contributing to this problem or issue?)
3. Who are the people who can help you? Who has information, knowledge, shared concerns and how can they be included in the process?
4. Write a DRAFT “presenting question” here and then compare / discuss it with those written by others on the team.

Checklist:

- The question posed has multiple potential answers.
- The question is specific enough so that it will be interpreted in the same way by each of the respondents.
- The question is singular in focus (i.e. there are not multiple questions embedded in one sentence.)
- Each person who will be responding to the question has enough information to fully participate in generating ideas about this topic.