Step 3 of the ToP Workshop Process: "Organizing."

THE BIG PICTURE	
Title	Organizing Data
Overview	Combining brainstorm data into coherent categories that relate to the focus question of the workshop
Metaphor	It's like a funnel. A mass of data from differing perspectives runs through a process that sorts it into useful categories.
Graphic	
Type	This requires the ability to see relationships among different ideas. It is convergent thinking
Role	This is the third step in the workshop process. It allows the brainstorm data to be consolidated into a memorable and sensible whole that embodies the group consensus.
Best Uses	This step allows a group to see and appreciate different viewpoints, and to include the insights of all participants in the whole. It displays the convergence of viewpoints and sets up the naming process in which the consensus is identified.
Do Not Use	This process would not be effective if the group is too large to see the data.
Group Size	This process can be used with f2f groups ranging from 8 to 50. In a virtual setting, it might be possible to use it with larger groups.
Time Frame	This part of the workshop process should be done in 15-20 minutes.
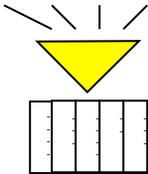
OBJECTIVES	
Rational Aim	To create clusters of similar information from the brainstormed data grouped according to the intent of the workshop.
Experiential Aim	Participants will sense a "belonging" to the group as they see that their ideas fit into the whole.
Product	Clusters or columns of similar items from the brainstorm
SCRIPT	
Context	"Now that you have your ideas, we want to pull them together and see where there is convergence in our thinking."
Instructions	1. "Each team give me the two ideas that _____. (are most important, are most long-range, are simplest…" The precise question will vary according to the topic.) "I will place the similar ones together, so help me identify those that go together." Facilitator takes the two cards (ideas) from each team and places them in a category (bucket – it could be a column or a cluster) on the whiteboard, placing obviously similar ones together and obviously different ones in separate categories. 2. "Now let me have one per team that _____ (are short range, most difficult…" Use a different question for this. The purpose is to get the teams talking with each other to select the cards to be plotted in categories. Eventually all will be included, but this step keeps people engaged in the organizing process.) If it is unclear where to place the idea, ask the group. DO NOT ask the group to place every idea. This is tedious and unnecessary. If the idea is obviously similar to something in one category, place it there; if it's not, ask the group or start a new category. Keep it moving. The point is to get the ideas organized quickly so that time can be spent on the next step – naming the categories. 3. Repeat step 2 with a different question until you have about one-third of the cards placed. Then ask "Give me any that are completely different from what's here." Place them either in existing categories or in new ones. The purpose of this is to be as sure as possible that you have all the categories identified. Others may emerge, but this is a

	quick way to ensure you have a comprehensive set of "buckets."
	4. Invite the group to place the rest of their ideas into categories where they belong.
	5. Invite the group to reflect briefly on what has emerged: "What do you notice?" This is quick, not a depth reflection. It's a transition into the next step of naming, and can be followed by a statement like, "Well, since we seem to have the most ideas in this bucket, why don't we give it a proper name to see what it means." .
Groundrules	1. Keep the group actively involved in doing significant tasks, like deciding on the placement of ambiguous ideas.
	2. Do not make them labor through placement of every idea when the location is obvious; the facilitator can do it.

USING THIS DESIGN PATTERN	
Materials	The participant screen needs a tablet to record team ideas, and a visual of the "whiteboard" with at least 7 columns visible. The facilitator screen needs a "holding place" to drop the team ideas just prior to plotting them in the categories. Participant teams will drop their ideas into the holding place in response to the facilitator's questions. The facilitator will quickly move them into the appropriate category.
	There also needs to be the capacity of team members to confer among themselves to select the ideas to submit in response to the facilitator's questions.
	Of course each participant needs a computer with Internet access and the appropriate software.
Preparation	Participant teams will have done their brainstorm and selection of the assigned number of ideas.
	The facilitator has become familiar enough with the topic to develop appropriate questions in calling for data and will have some tentative ideas about categories that may emerge. These are mainly for confidence-building and should not overtly intrude into the workshop.
Challenges	Inexperienced facilitators often try to get the whole group to plot every idea into a category. This is slow and boring. The challenge is to move

	quickly in plotting ideas and invite participants to question and/or move ideas into other "buckets" if they don't agree.
Tips	Before beginning. Be sure teams have selected the number of ideas assigned by the facilitator. Try to get some view of their ideas before you begin to organize, even if it's just the number they generated in the brainstorm. Once you get an idea plotted, trust your plot – don't ask the group to review and move things around! They will tell you if something needs changing! Asking the question invites unnecessary quibbling, and you want to spend the time on the next step – naming the ideas. If there is disagreement over placement of an idea, let the team that generated it have the last say. If there is still disagreement, put it in both places (make a duplicate).
Modifications	It is possible to get all the ideas together, then invite the whole group to find pairs of similar ideas and develop clusters in that way. This may be possible for small groups, but for a group of more than 10, it becomes awkward and in danger of a few people dominating the process.