AFFINITY PROTOCOL

This protocol is designed to guide teams when seeking to define, synthesize and/or summarize elements of a larger task or investigation. This tool can be used to support the identification of key themes and can support consensus finding.

Participants

Roles: Facilitator, Timekeeper

Group Size: 2-10

Time: 30+ minutes (depending on group size)

Materials

In-person:

- Shared notetaking: large poster paper (posted prior to engaging in the protocol) and markers
- Individual notetaking: post its or paper, and pen or pencils

Virtual: virtual affinity workspace.

Instructions for Use

1. **Introduce the topic or question.** Invite a silent reflection.
2. Invite participants to **silently write their ideas** on a piece of paper, to then transfer to post-it notes, or directly on post-it notes. Utilize one post-it per idea. Set a timer for 2-4 minutes.
3. Instruct the participants to **bring their post-it notes to the chart paper**, continuing in silence, and randomly place them on the Affinity Map.
4. **Facilitate.** Ask participants which ideas go together. Have a portion of or all participants silently group "like ideas". Remind participants that their ideas may be moved, and that's ok. Once most post-its are grouped end this phase of the activity.
5. **Label the groups of post-its.** Ask volunteers to read aloud an affinity group of post-its at a time. Ask them to share whether they believe all of the post-its belong in the groups and invite them to move any that don't. Then, ask them to give the affinity group a title and label it. Do this for each group of post-its. Note: It's ok to have a group of outliers at the end.
6. **Facilitate a group discussion.** Invite participants to reflect on; themes, surprises, and things that may be missing.
7. **Optional: Planning for next steps**. In small groups or whole group, identify high leverage categories to focus on, additional questions that need to be answered, and additional next steps based on the goals of the group.