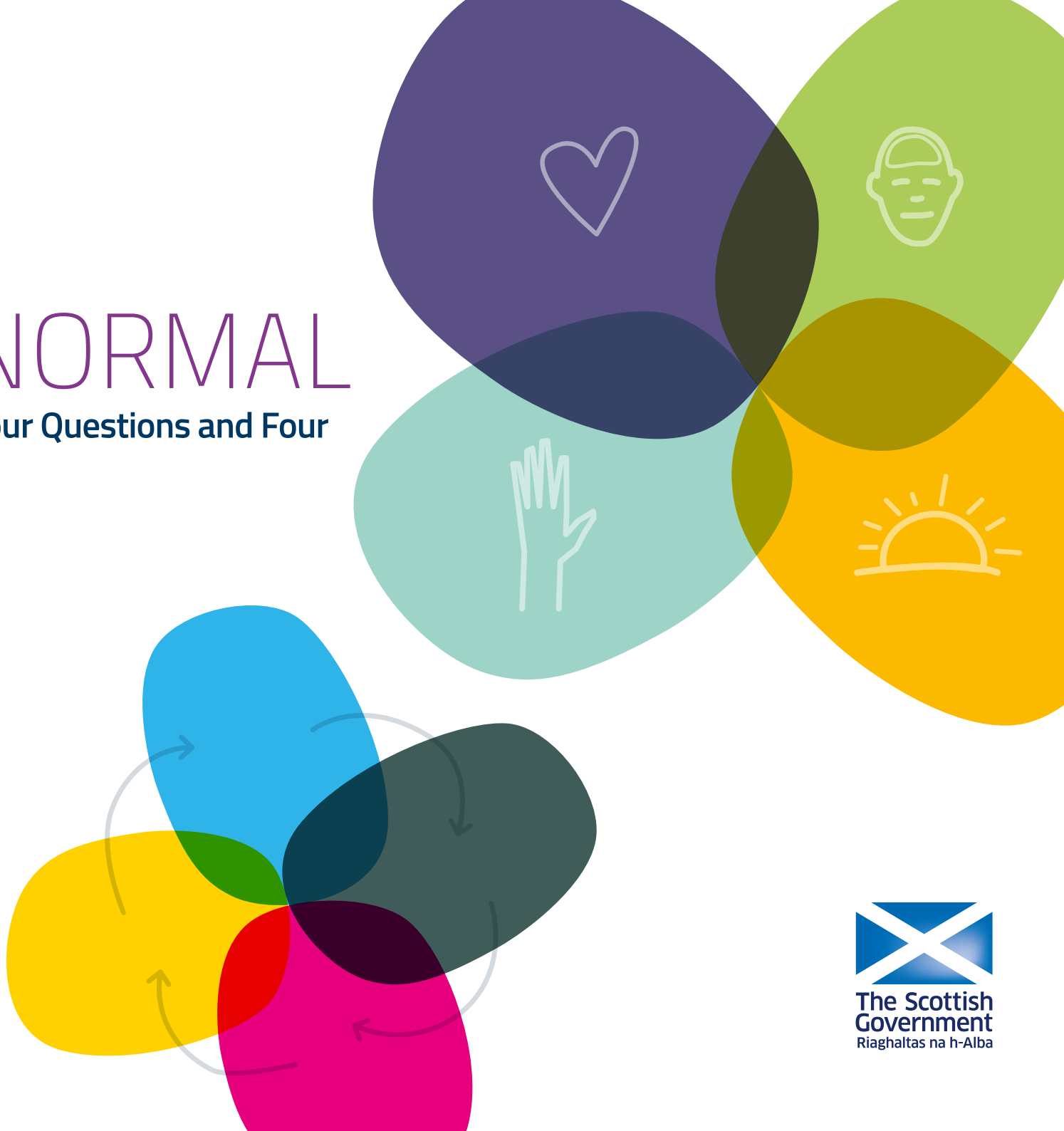
SHIFTING NORMAL

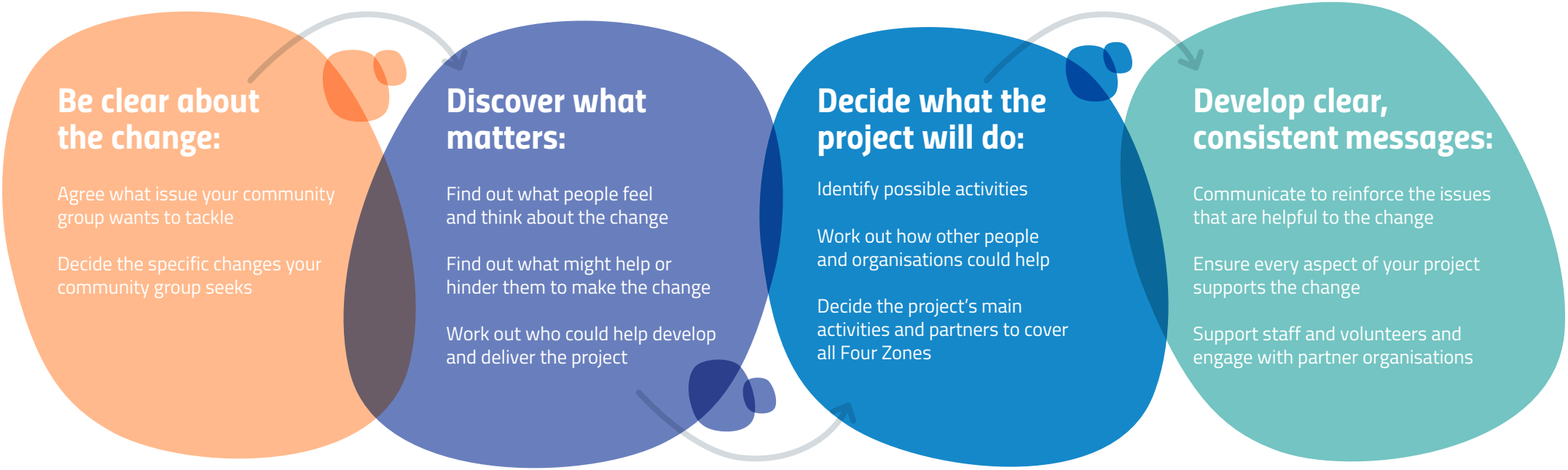
Workshop outlines: **Using the Four Questions and Four Zones for project design**



The Scottish Government
Riaghaltas na h-Alba

Workshops to *discover what matters and decide what the project will do*

The outlines below show how the Four Questions and Four Zones framework can be used with a group to develop your project. They take a group of people through the stages ***Discover what matters*** *and* ***Decide what the project will do:***



Feel free to adapt these suggestions or to integrate the Four Questions and Four Zones framework into your own approach. The workshops could be adapted for different circumstances, perhaps for a session with partner organisations. Each workshop can be run in two hours.

Tips for running a workshop

Welcome

Make people feel welcome with tea, coffee and cake on arrival!

Layout

A good layout for 8-12 people is sit around a large table so everyone can see each other clearly. Try and arrange things so the workshop leader(s) can also sit at the table when they don't need to be standing up to write on the flip chart. This helps the workshop feel more like a conversation where everyone can speak freely.

With more than 12 people, arranging the room 'cabaret style' with 4-5 people around a number of smaller tables works well. Here the workshop leaders will normally have to stand separately from the people at the tables in order for everyone to hear them. In this case, you may need to adapt the structure below slightly.

Materials

You will need:

- Either one copy of Shifting Normal between two people, or you print out the same number of copies of the relevant diagrams – see notes for each workshop overleaf. (Copies of the diagram for printing are included at the end of this document.)
- Flip chart, marker pens, Blutack or masking tape, PostIt notes (2 colours) and pens (for 'Decide what the project will do' workshop).
- Spare paper and pens for participants.
- Wall space to display flipcharts.

Workshop leader(s)

The workshop leader should be familiar with this guide and the structure of the workshop. It can be useful to have two people: one to lead the workshop and one to write up the flip charts, hand out materials etc, keep an eye on the time and remind the other if anything has been missed.

The purpose of the workshop is to gather the views of the participants, so it's important that the workshop leader doesn't influence people or only 'hear what they want to hear'. When writing what people say on the flip chart, take care to use their own words as much as possible; ask them to summarise their point if necessary. If you alter their words to make them clearer, make sure they are happy with what you have done.

Some people may be quiet during the workshop, they may feel they don't have anything to add to what has already been said, or they may feel shy about speaking up. It's important to make sure everyone who wants to contribute can do so; the discussions in pairs or threes below make this easier. When the whole group is invited to contribute a good way to give quieter people an opening is to ask, "Does anyone who hasn't spoken about [this topic] have anything they'd like to add?" This avoids putting anyone on the spot by asking them by name to contribute which can feel uncomfortable.

‘Discover what matters’ Workshop

Who should be involved?

It’s helpful to have people with a range of experience and interests at the workshop, as this makes it more likely that new ideas and insights will be generated. These might include the committee of the community group, any staff and volunteers, other members of the group, interested members of the wider community and perhaps members of organisations who might be involved in the project. Between 8-12 people is a good number. If there are more people you will probably need to allow more time and perhaps have a second person to help run the workshop.

Preparation

Ideally attendees will have been involved in the previous stage where the change(s) the project will aim to bring about were agreed. If they haven’t, it may be important to meet with them in advance to explain what is happening and to be sure they are supportive of the change proposed. In the invitation make clear that this workshop is about developing the project, not deciding what change the project will be working on.

Time	Activity	*Notes*
10m	**Welcome and Introductions**	
	Introduce yourself; Welcome people to the event; Briefly remind them of the purpose of the workshop.	*A clear statement of the purpose at the start will help keep the workshop focused.*
	Invite everyone to turn to the person next to them and introduce themselves and why they are interested in the project. After a minute or so, remind people to swap over if they haven’t already.	*This gives everyone a chance to speak without feeling awkward.*
	Invite everyone to speak to the whole group, and say: ▪ their name; ▪ where they are from (this may be the area they live or the organisation they represent); *and/or* ▪ a *couple* of words on why the change sought is important to them. Start off yourself, keep your ‘couple of words’ really short to set a good example.	*It’s good for everyone to know who is in the room very early on.* *The last option helps everyone get an impression of the other people’s interests and motivation – it can be an eye opener.*
10m	**Be Clear about the Change**	
	Briefly describe how the change the project aims to bring about was agreed, and what the specific change is that this workshop will focus on. Answer any questions.	*Having a prepared flip chart with this written on it, and stuck on the wall can be a useful reminder for the whole workshop.*

Continued on next page.

15m	**Introduce the Four Questions and Four Zones**	
	Explain that the workshop will be using this model.	*Pass round Handout 1: the diagram with the Four Questions or ask people to turn to page 4 of Shifting Normal.*
	Explain how people ask themselves these Four Questions when deciding to do something and talk people through the diagram with a couple of examples.	*Adapt the text on p3, just talk about the main points. Use examples from the text and/or the case studies.*
	Explain how the answers to the Four Questions are influenced by the Four Zones. Talk them through the Four Zones with a couple of examples.	*Pass round Handout 2: the diagram with the Four Zones or ask people to turn to page 8 of Shifting Normal.* *Adapt the text on p7, just talk about the main points. Use examples from the text and/or the case studies.*
	Explain how the Questions and Zones can be put together by talking through the diagram with the solar panel case study.	*Pass round Handout 3: the table with the solar panel example or ask people to turn to page 14 of Shifting Normal.*
	Ask if anyone has questions? Explain that it will become clearer when we start using it for our project.	*If asked, emphasise that it's not very important which issues are put in which box – the point is to use the table to try to cover all the important issues.*
	Discover what matters for the change your community group wants.	
30m	***What do people think and feel about the change?***	
	Explain that we will now be using this framework to understand what people might think and feel about the change we want. Explain that these questions will help us dig deeper in the situation.	*Pass round Handout 4: the Questions and Zones table or ask people to turn to page 12 of Shifting Normal.*
	Ask people to look at the Questions and Zones table (working down each column) and to answer the questions from the point of view of the people that the change is relevant to. If the whole group is discussing the questions, make a note of the most important issues on a flip chart as the discussion goes along.	*In a group of six or more, or if some people are quiet, ask people to do this in pairs or threes. In a small group do it with everyone.*
	▪ If people are discussing the questions in pairs or threes, after 5-10 minutes ask each pair or three to tell the whole group what issues they think are the most important, and note these on a flip chart; or ▪ If people are doing this as a whole group, make a note on flip chart of the issues that come up as the discussion goes along. When they have been written up ask people which are the most important and mark these with a star.	
15m	***What might help or hinder the change?***	
	Working from the list on the flip chart, ask the group which issues could help the change and which could hinder. Mark those that help with a plus sign or smiley face; those that hinder with a minus sign or sad face. If it's not obvious, ask people to explain why they believe the issue would help or hinder.	*Avoid discussion about what to do – focus on what the issues are and whether they will help or hinder.*

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15m	*Who could help develop or deliver the project?*	
	Ask the group to consider what people, groups and organisations might be able to help develop or deliver the project. Emphasise that these are just ideas at this stage. If it's not obvious, ask people to explain their suggestion. Make a list of the suggestions on a separate flip chart	*In a small group this can be done as a discussion around the table. With a larger group it may help if people discuss this is threes or fours and then tell the whole group their suggestions.*
15m	*What research might be needed?*	
	Explain that the issues that have been identified in this workshop have been based on a mixture of the experiences and knowledge of the people in the room, but we may not have had all the information we need. We may need to do some research. Ask people to consider all the items on the list and to mentally score how confident they are that the issues is correct, where 3 is very confident, 2 is fairly confident and 1 is not at all confident. Give people a moment to do this. Ask everyone what issues they have scored 1; write '1' against the relevant issues on the flip chart. Repeat with 2 and 3. Summarise and highlight the items with the most 1s and 2s. Discuss each of these issues in turn: ▪ What do we need to know? ▪ How might we find that out? Record this information onto new flipchart sheets.	*Take care not to imply the people in the room are the wrong people or that they don't have the right expertise.* *With a large group the final discussion of issues could be split between different tables: each table considering different issues.*
10m	*Summarise and close*	
	Remind people that the aim of the workshop was to discover what matters: to understand as much as possible about the situation before starting to design the project. Explain that the next stage will be to take the work this group has done and use to design the project. If a number of issues needing research have been identified, explain this will need to be done first. Ask everyone to think about something interesting they have discovered during the workshop or something they have enjoyed about the workshop. Ask everyone in turn to say what that is in just a few words. Start with yourself, make sure you really do say just a few words to set the example and go around the group. Thank everyone for their time and help.	*Make sure everyone feels appreciated and that they understand how the time they have spent will help develop the project to bring about the change the group wants to see.* *The final 'go round' is a good way to close a workshop: it gives the leader some immediate feedback about what people got out of the event, and it lets everyone feel their contribution is listened to.* *In a larger group or where time is short, ask people to think back over the workshop: what word comes to mind? Ask people to share this one word in the 'go round'.*

Follow up

Using the notes from the flip chart record the main outcomes of the workshop:

- A list of issues that help the change.
- A list of issues that hinder the change.
- A list of people and organisations that could help the organisation.

The list of issues that help and hinder could be summarised in a table (see example on page 18 of Shifting Normal).

‘Decide what the project will do’ Workshop

Who should be involved?

It’s helpful to have people with a range of experience and interests at the workshop, this makes it more likely that new ideas and insights will be generated. These might include the committee of the community group, any staff and volunteers, other members of the group, interested members of the wider community and perhaps members of organisations who might be involved in the project. Between 8-12 people is a good number. If there are more people you will probably need to allow more time and perhaps have a second person to help run the workshop.

Preparation

Ideally attendees will have been taken part in the ‘Discover what matters’ workshop. If they haven’t it will be helpful to meet with them in advance to explain what happened, show them the main results and encourage them to read a copy of this guide. In the invitation make clear that this workshop is about developing the project, not deciding what change the project will be working on.

If research has been carried out since the previous workshop it may be useful to circulate this in advance.

Time	Activity	*Notes*
10m	**Welcome and Introductions**	
	Introduce yourself; Welcome people to the event; Briefly remind them of the purpose of the workshop.	*A clear statement of the purpose at the start will help keep the workshop focused.*
	Invite everyone to turn to the person next to them and introduce themselves and say why they are interested in the project. After a minute or so, remind people to swap over if they haven’t already.	*This gives everyone a chance to speak without feeling awkward.*
	Invite everyone to speak to the whole group, and say: ▪ their name; ▪ where they are from (this may be the area they live or the organisation they represent); *and/or* ▪ a *couple* of words on why the change sought is important to them. Start off yourself, keep your ‘couple of words’ really short to set a good example.	*It’s good for everyone to know who is in the room very early on.* *The last option helps everyone get an impression of the other people’s interests and motivation – it can be an eye opener.*
10m	**Summarise results of previous workshop**	*The level of detail and time spent on this will depend on whether most people were at the previous workshop and how long ago it was.*
	Remind everyone of the Four Questions and Four Zones	*Pass round Handout 4, the Four Questions and Four Zones table, or ask people to turn to page 12 of Shifting Normal.*

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	Show everyone the list of: ▪ issues that help the change; ▪ issues that hinder the change; and ▪ people and organisations that could help the organisation.	*Use copies of the report of the previous workshop and/or have these written up on flip charts.*
	Invite any questions	
20m	***Activities to build on the issues that help the change***	
	Explain that the project will need to build on the issues that help and try to overcome those that hinder the change. We need to work out what the project will actually do to achieve this.	
	Ask people to consider each 'help' issue in turn: how might the project build on these? Use examples from case studies to stimulate ideas. Write down the suggestions for activities on PostIts – one idea per PostIt. Stick the PostIts onto the flip chart next to the relevant issue – if one activity addresses more than one issue use a marker pen to link them with lines or use numbers.	*Use one of the colours of PostIt for this stage.* *With a group of 6 or less, do this as a discussion of the whole group around the table.* *With a larger group ask people to work in groups of 3-4. They can write the PostIts themselves.*
20m	***Activities to tackle the issues that hinder the change***	
	As above.	
15m	***How other people and organisations could help***	
	Ask people to consider the list of people and organisations that could help. In some cases it will be obvious, in other cases it will need thinking about. For each of the activities from the previous sections, discuss which person or organisation could contribute and what their roles might be. Write this on PostIts and stick each PostIt next to the relevant activity.	*Use the other colour of PostIt for this stage.* *With a group of 6 or less, do this as a discussion of the whole group around the table.* *With a larger group ask people to work in groups of 3-4. They can write the PostIts themselves.*
	Decide the project's main activities and partners.	

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5m	*Summarise results so far*	
	Summarise where the workshop has got to: at this stage there should be a number of possible activities and for some of these there may be people and organisations that could help. These should be on flip charts and posters on the wall. Explain these are all just suggestions at the moment, and it may not be possible or sensible to try and do all of them: ▪ Some activities may overlap or duplicate. ▪ The people and organisations identified may not be willing or able to help. ▪ It may make sense to start with a small project and learn from that before doing something on a larger scale. ▪ Especially if the activities rely on volunteers it will depend on whether enough people are willing and able to volunteer, and how keen they are. ▪ There might not be enough funding to do all of them.	*This section of the workshop will need to be flexible depending on the number of activities etc and the complexity of the project.* *It may not be possible to decide everything now:* ▪ *more research may be needed; and* ▪ *the decisions may need to be made by a formal committee etc.* *However, you should aim at least to have an idea of the most important activities and how they will fit together.*

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30m	*Developing a draft plan*	
	Explain that next we need to develop a clear plan to bring about the change we want. Remind people that: ▪ for the change to happen, it must feel right for the people involved, make sense, be do-able and fit into their day; and ▪ projects which support change across all four zones: I, We, They and It tend to be more successful. Referring to the table on the handouts or wall, explain that: ▪ for each of the issues that hinder the change it must be clear how the activity(ies) will do this; ▪ for each of the issues that help the change it must be clear how the activity(ies) build on this; and ▪ it must be clear how the people and organisation we want to be involved will contribute to the activities. Referring to the list of activities from the previous session, ask: ▪ Which are the most important? ▪ Why? For each of the most important activities discuss how effectively it addresses the issues that help and hinder. It may become clear some of the activities need to change or could be merged. Ask people which of the activities are required to bring about the change we want. Summarise these on flip charts (one activity per sheet): ▪ including any people or organisations that would be involved; and ▪ which of the issues that help or hinder it addresses. Ask people to double check whether these activities: ▪ cover all the issues; ▪ mean that people will be able to answer all the Four Questions; and ▪ have actions in all the Four Zones. Discuss and revise as necessary.	*Hand out copies of the table produced after previous workshop – or have this on a flip chart on the wall.*

Continued on next page.

10m	*Summarise and close*	
	Remind people that the purpose of the workshop was to agree the main activities for the project. Point to the final flip charts to show they have achieved this. Explain that this draft plan will be developed further and let them know what will be happening next and how they might be involved. Ask everyone to think about what has been discussed in the workshop and remind them that we started by telling each other why the change is important to us. Ask them to think about what makes them most hopeful that the project will be successful. Ask everyone in turn to say what that is in just a few words. Start with yourself, make sure you really do say just a few words to set the example and go around the group. Thanks everyone for their time and help.	What happens with the draft plan will depend on the situation – eg costings, discussion with people and organisations that could help, etc – so adapt this as necessary. In a larger group or where time is short, ask people to share one word that expresses their hopes for the project.

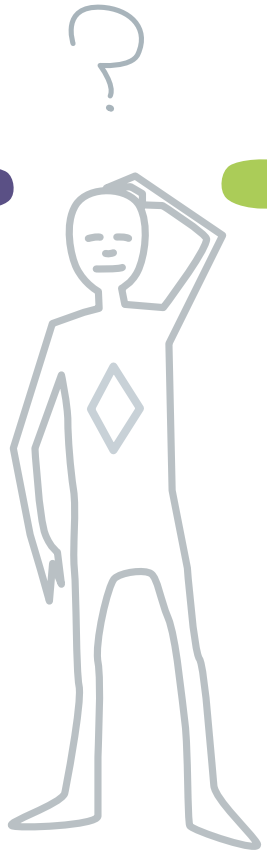
Handout 1

Does it feel right?

The way we feel is often an immediate, instinctive reaction and that initial impression can be hard to overcome later. However strong other more logical reasons might be, if something feels wrong or makes us uncomfortable, we will resist doing it.

Does it make sense?

We like to think we are rational beings, but we often use rules of thumb and over – or under – estimate costs and benefits, financial and otherwise. We also 'rationalise' decisions we've actually made for other reasons.



Does it fit into my day?

Most of the things we do, we do from habit, often prompted by our household and workplace routines. Changes are easier if they fit into our existing habits and routines. External schedules for transport, work and school can also influence our choices.

Can I do it?

We may want to do it but may be prevented from doing so by our lack of skills and confidence. We may also need particular tools, equipment and infrastructure to do things.

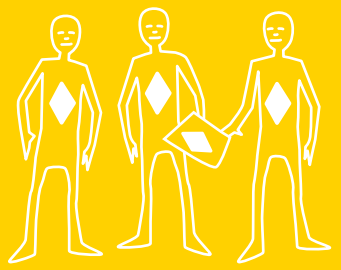
To do or not to do? These are the Four Questions people ask themselves – nearly always unconsciously – as they make choices and decisions.
For something to be easy to do, the answer to every question must be 'yes'.

Handout 2

The 'I' Zone

Factors that are personal and internal to each **individual**.

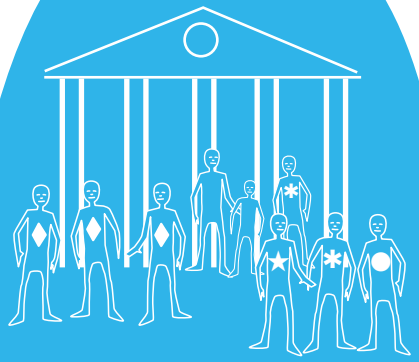
These include an individual's values, attitudes and skills, and their assessment of the costs and benefits of any decision.



The 'We' Zone

Factors related to the **social groups** that we are part of, such as our family, friends, colleagues and neighbours.

These include the different roles we have in particular circumstances, what's considered normal in our group, and who we know and trust.



The 'They' Zone

Factors related to **wider society**, beyond our immediate social group.

You might think "they should change the law about...".

These include rules, regulations, policies and procedures, and the economy.

The 'IT' Zone

Physical factors that we use directly or are part of the world around us.

These include tools, equipment, technology and infrastucture.

The world influences us

The decisions and choices we make are influenced and not just by our individual attitudes, skills etc, but also by the social groups we are part of; by the wider society; and by physical factors.

Handout 3

How the Four Zones influenced the Four Questions in Transition Linlithgow's solar power project

The Four Questions	'I'	'We'	'They'	'It'
	The Four Zones			
Does it feel right? EMOTION	Generating clean energy locally feels good.	As more panels are installed they become part of the norm in the town, people feel more comfortable with the idea of installing their own. Reducing carbon emissions also feels more normal.		People may be reluctant to install solar if they have recently upgraded their boiler etc.
Does it make sense? RATIONAL	Project explains the costs, benefits, and carbon savings for each particular household. For people without savings, does it make sense to borrow to install solar?	People see others installing solar and reducing emissions: this gives them confidence that it will make sense for them too.	Government's Feed In Tariff makes installation more financially attractive. Imminent changes to the scheme provided an incentive to install before the deadline. Financial returns from investing the cost of installation in financial products may influence decisions.	Using solar PV while connected to the grid means excess power can be sold and you still have electricity when the panels aren't generating.
Is it do-able? ABILITY	No skills or knowledge required for installation. Supplier explains how to use equipment after installation.	Transition Linlithgow is trusted locally: they and their expert can help residents with the decision and carry out the installation.	Planning regulations may be an issue, especially in conservation areas. The solar market is crowded and complex. The project made it easier for people to make the decision to go ahead.	Showcase event helps people understand the equipment available. Supplier advises whether each property is suitable for particular equipment.
Does it fit into my day? TIME AND SCHEDULES	Some disruption during installation. Perhaps showering in the evening, using timers on washing machine etc.	Some disruption during installation. Whole family may need to change routines to make the most of the system.		Solar thermal provides more hot water later in the day which may affect routines. Making the most of solar PV means using energy when the sun is shining. Project explains how to make best use of system.

Handout 4

Use these detailed questions to understand how the Four Questions and the Four Zones relate to your project.

The Four Questions	'I'	'We'	'They'	'It'
	The Four Zones			
Does it feel right? EMOTION	How pleasant or unpleasant will this be? How does this help or support people and places that are important to me? What are my feelings about this activity?	Might this seem strange to colleagues, friends, neighbours and others in my social groups? How comfortable might I feel doing this? Is this more or less relevant to me in my different roles eg mother, manager, sports player?	What do people I admire in society say and do about this? What festivals, celebrations or events may influence whether I do this? What traditional, cultural or religious norms, expectations or rules help or hinder me to do this?	How do the equipment, infrastructure and technologies around me influence how I feel doing this? How might using the tools and technologies I would need to do this make me feel?
Does it make sense? RATIONAL	How do the benefits compare with the effort, costs and time involved? How does this fit with how I think the world works (or should work)?	How much are others in my social group doing this? Does it make sense for me to do it too? What do people I respect in my social group say and do about this?	What laws and regulations are relevant to my decision about this? What is happening in the economy that might be relevant to my decision? What future changes in policies and regulations might make it sensible to do this now or later?	How does the equipment I've already got, and spent money on, influence what makes sense to me?
Is it do-able? ABILITY	What knowledge and practical skills are needed to do this? Do I have these? Even if I have the knowledge and skills, do I have the confidence to do this?	Who do I know and trust who could help me do this? What local groups and organisations that I trust could help me do this?	What national/regional organisations that I trust could help me do this? What government, local authority and other schemes and initiatives could help me do this?	How accessible are tools, equipment or resources needed to do this? How easily available or usable are the services, infrastructure and technologies needed to do this?
Does it fit into my day? TIME AND SCHEDULES	How might my existing habits make doing this difficult or easy?	How might this fit in with my routines with family, friends and colleagues?	How might the timetables for work, school, shopping, travel etc, help or hinder me doing this?	How might tools, equipment and technologies related to this influence my routines and how I spend my time?

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