



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. The affinity protocol can be used at any stage of the CIM process, but may be most useful during Step 2 when teams are investigating root cause and collecting various forms of data.

Participants

Roles: Facilitator, Timekeeper

Group Size: 2-10 people

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.