**Tactic: Aligning on key guiding elements (e.g. criteria)**

*Improve groups’ effectiveness in evaluating the merits of specific proposals or ideas, by first aligning on a shared set of criteria or guiding principles to help them evaluate ideas that emerge throughout the convening.*

**When to Use It:**

Use early in a convening when a group needs to align on criteria, principles, or values that will guide later decision‑making. It’s particularly useful just before participants begin generating or assessing specific recommendations, proposals, or strategies.

**How it Works:**

**Step 1 (2 minutes) | Introduce**

Introduce a starter list of 3-5 criteria (e.g. ease of implementation, market impact, political viability).

**Step 2 (10 min) | Refine**

Invite participants to refine the list by proposing revisions, additions, or substitutions. The facilitator synthesizes in real time, arriving at a shortlist of no more than 7 criteria.

**Step 3 (10 minutes) | Prioritize**

Invite participants to vote for the top 3 criteria using dot stickers (give them 5 dots that they can distribute however they’d like). Adopt the criteria with the most votes. If there are ties, repeat the process until you land on the desired total number of criteria you need.

**Step 4 (5 minutes) | Confirm the group’s alignment**

* Ask the group: “Are these criteria we can all live with for the rest of this convening?”
* Go around the room. Participants respond either “*safe to try*” or raise objections.
* If someone objects, invite them to propose a revision that would make the criteria safe to try. Once the revision is accepted, consider the list final.

### **Helpful Tips:**

* **Bring draft criteria.** Generating criteria from scratch can be time-consuming, so come prepared with a proposed set of criteria for the group to refine.
* **Display live edits**. Write criteria on flip charts or a shared document so everyone can see the evolving list in real time.
* **Keep it memorable.** Limit the final list to a small set of crisp, memorable criteria that participants can keep top‑of‑mind.