

DIVISION OF ADMINISTRATION & FINANCE

Strategic Planning Task Force Training II

January 23, 2008

Objectives



- ❑ Review revised timeline for task force activities.
- ❑ Demonstrate select collaborative activities that have proven to be effective, in particular tools and techniques for gathering and prioritizing input.
- ❑ Discuss task force progress and specific questions or issues.

Task Force Timeline--Updated

Taskforces determine whether to participate in a combined survey with other taskforces January 25, 2008

Taskforces finalize questions for combined survey (if participating) February 13, 2008

Taskforce chairs present progress reports to Steering Committee Mid March 2008

Taskforces submit draft reports, including recommended goals, objectives, and actions plans, to VP Mid April 2008

Taskforces present draft reports to Extended Managers & Steering Committee End of April/Early May 2008



Collaborative Activities

Collaborative Activities



- Focus: The creative process of planning and facilitating a set of activities that move a group successfully towards conscious goals.
- Four key elements to consider:
 - ▣ Purpose
 - ▣ Stakeholders
 - ▣ Design
 - ▣ Logistics

Purpose



- Defining your purpose, or what you want to accomplish at a particular session, is the most important element.
- It is often the most difficult to define.
- Consistently ask, “What is our hoped for outcome?”
- Once you have defined your purpose clearly you can begin to think about the stakeholders to invite and the format of the design.
- Communicate your purpose to invited participants before they attend the session.

Stakeholders



- Once you have defined your purpose, ask who needs to be at a session or series of sessions to accomplish the purpose?
- Don't be afraid of large numbers. Well designed collaborative activities will allow you to manage input from both small and large groups.
- Choose the right people and then select the right design.

Stakeholders To Consider



- Who has the content expertise to help with this issue?
- Who has institutional memory and can give us a sense of history about the issue?
- Who has political power or savvy and can help us map out sensitive issues?
- Who has information that would be helpful to us?
- Who has insight and wisdom?
- Who might be impacted by recommendations we make?
- Who has creative ideas and approaches to problem solving?
- Are different levels represented so we are not looking at the issue from the same perspective?
- Who could hurt us if they aren't involved?

Design



- ❑ Format of the session needs to be open—no hidden agendas.
- ❑ Transparent decision-making.
- ❑ Participant-driven.
- ❑ Tap resources within the group.
- ❑ Organized for maximum participation & interaction.
- ❑ Embrace diversity.
- ❑ Build community & connection.

Logistics



- Show up early so you have time to fix last minute issues if anything goes wrong.
- Wall space is your friend.
- Make sure you have enough space: bigger is always better.

Facilitator Tips



- Remember to remain neutral on content. You are in charge of managing the process.
- Be confident. Direct the process to mobilize the group.
- Keep the group focused.
- Consider co-facilitation.
- Listen actively.
- “Protect” participants as necessary.

Sample Tools To Generate Input



- Carrousel Exercise
- Affinity Diagram

Carousel Exercise



- AKA: The Gallery Walk; The Walkabout
- Highly interactive and participative
- Time efficient
- Can be used to gather information about areas such as:
 - ▣ Organizational climate
 - ▣ Stakeholder concerns
 - ▣ SWOT
 - ▣ To get advice about organizational issues

Carousel Exercise (continued)



- Logistics
 - Flipcharts, easels, markers, tape, timer
 - Large comfortable room where participants can move around easily
 - 1 1/4 to 2 hours
 - Number of participants: 10 to 40

Carousel Exercise (continued)

- Need to do up front homework and be very clear about the purpose/intent.
- Ideal number of questions for this design is 4. Can use up to 6 questions for larger groups—this is the upper limit.
- Need to come up with the focus questions. For example:
 - ▣ What do we do well?
 - ▣ What are areas of weakness?
 - ▣ What are some opportunities we should be taking advantage of?
 - ▣ What are some threats?

Carousel Exercise (continued)



- Create four separate stations throughout the room with an easel and flip chart paper. Each station should have a focus question at the top of the flip chart.
- The facilitator should have the group break into groups of 4 by counting off. This will give you randomly selected groups.
- Make sure each participant has a marker and have them stand in front of their assigned easel with the question written on the flip chart.

Carousel Exercise (continued)

- The facilitator should let participants know that their goal is to read the focus question at the top of the flipchart and individually record their responses to the question.
- This is not about group agreement. You are looking for individual responses. This is why everyone has a marker.
- If participants agree with other people's ideas they can indicate their agreement by placing a check mark next to the idea.

Carousel Exercise (continued)



- Each group is given 5 to 6 minutes to read the focus question and individually record responses.
- At the end of 5 or 6 minutes the facilitator should indicate that each group should move clockwise to the next station.
- Each group then reviews the input from the previous group, individually checks off ideas with which they agree, and adds their own ideas to the list.

Carousel Exercise (continued)



- This process continues until all four groups have answered each question individually by rotating to all stations.
- Once all questions have been answered, have each group return to the question where they first started.
- There will be a lot of new information added to this station. Give the groups several minutes to read the new information and indicate agreement by checking off new responses to the question with which they agree.

Carousel Exercise (continued)



- The last step in the design is to have each original group report on the top four or five answers for their focus question.
- These will easily be recognized by their check marks.
- Keep this mini presentation to about 2 minutes.
- The goal is to indicate the most important ideas and gain closure.

Carousel Exercise (continued)



- Variations:
 - ▣ Have a facilitator at each station to assist in keeping groups focused
 - ▣ Use Multi-Voting/Las Vegas voting at the end of the exercise to further prioritize input

Carousel Exercise (continued)



Let's Give It A Try!

Affinity Diagram



- A design method used to elicit and organize thoughts from a group of individuals who may represent disparate points of view.
- Particularly helpful if “closing the gap” between different viewpoints.
- Provides a supportive environment in which potential “risks” connected with ideas are minimized.

Affinity Diagram (continued)



- Logistics
 - ▣ Post it notes, pens, flipchart paper
 - ▣ Comfortable room where participants can move around easily
 - ▣ 45 minutes to 1 hour
 - ▣ Number of participants: 10 to 40

Affinity Diagram (continued)



- Need to do up front homework and be very clear about the purpose/intent.
- Need to come up with a question or statement that clearly identifies the issue.
- Post this question or statement in visible location.

Affinity Diagram (continued)



- Following brainstorming guidelines, give a time limit of 6 to 8 minutes in which individuals work independently:
 - ▣ Ideas are recorded separately on post it notes
 - ▣ No one word post it notes are allowed
 - ▣ Each statement should contain a noun & a verb
 - ▣ Write clearly and large enough so everyone can see/read

Affinity Diagram (continued)



- Gather around a wall and ask everyone to place their post it notes on to flip chart paper posted on the wall.

- Ask the group to sort post it notes into related groupings:
 - ▣ Do it in silence
 - ▣ Follow first reaction
 - ▣ If disagree, don't discuss; simply move the post it notes

Affinity Diagram (continued)



- Create header cards:
 - Each statement needs to make sense independently
 - Look for header within the grouping
 - Place header at top

Affinity Diagram (continued)



- Variations:
 - ▣ Draw the finished diagram by connecting
 - ▣ Use multi-voting/Las Vegas voting at the end of the exercise to further prioritize input

Affinity Diagram (continued)



Let's Give It A Try!

**Question: How can we improve
internal and external divisional
communication?**

Sample Tools To Establish Priorities



- ❑ Multi-Voting or Las Vegas Voting
- ❑ Nominal Group Technique

Multi-Voting/Las Vegas Voting



- A simple method to winnow down lengthy lists into a manageable list.
- Open, democratic, and fair to all participants.
- Allows the group to see what people believe are the most important ideas.

Multi-Voting/Las Vegas Voting

(continued)

□ Logistics

- Flipchart paper, markers, sticky dots
- Comfortable room where participants can move around easily
- 10 to 15 minutes
- Number of participants: Almost any size group

Multi-Voting/Las Vegas Voting

(continued)

- Occurs after a group has generated a list of ideas & these ideas have been clarified. The purpose of this step is to ensure everyone understands the suggestions, not whether they are good or bad. There is no judgment or feedback involved with this step.
- The facilitator explains that each person will have a specific number of “votes” to distributed among the ideas generated on the list—typically participants receive 3 or 5 votes. It is highly unusual to allot more than 10 votes per person.

Multi-Voting/Las Vegas Voting

(continued)

- Participants use their colored dots to identify those ideas they believe are the best ones to consider and implement.
- Participants can weigh their votes any way they want (e.g., they can put all five votes on one idea, put two votes on one idea and three on another, or distribute one vote for five different ideas, etc).
- Let the participants come up to the flipchart and place their votes.

Multi-Voting/Las Vegas Voting

(continued)

- Variations:
 - ▣ It can be helpful for the group to agree up front on simple criterion for voting (e.g., it will really make a difference, or it's something we can do easily).
 - ▣ Can use fingers to vote if sticky dots or not available.
 - ▣ If there is a “tie”, can conduct a second round of voting with fewer number of votes if necessary.

Multi-Voting/Las Vegas Voting

(continued)



Let's Give It A Try!

Nominal Group Technique



- Assists in “leveling the playing field” among people of varying levels of position, seniority and participation.
- Useful when there are many good alternatives to an issue.
- Also useful when the topic being discussed is sensitive or controversial.

Nominal Group Technique (continued)



- Logistics
 - ▣ Flipchart paper, pens
 - ▣ 10 to 15 minutes
 - ▣ Number of participants: Best for groups of 10 or less

Nominal Group Technique (continued)



- Occurs after a group has generated a list of ideas & these ideas have been clarified. The purpose of this step is to ensure everyone understands the suggestions, not whether they are good or bad. There is no judgment or feedback involved with this step.
- The facilitator assigns a letter to each suggestion or idea on the flipchart.
- Have each group member write down the letters corresponding to those listed on the flipchart.

Nominal Group Technique (continued)

- Ask each member to vote silently for the ideas. They should assign the highest number to the very best idea and the lowest number to the least effective idea.
- Ask each member to call out their rankings and record them on the flipchart paper on full view.
- Add up the number of votes for each idea (letter). The items with the highest number of totals indicate the group's preferences.

Nominal Group Technique (continued)



- Variations:
 - ▣ If the trust level is low, when tallying the rankings the facilitator can collect the voting sheets and tally the results in full view (this way no one knows who voted for what).
 - ▣ Voting can also occur electronically, via email.

Nominal Group Technique (continued)



Let's Give It A Try!