Co-creating the Future: Working with Groups to Assess, Plan, and Innovate

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Co-creating the Future: Working with Groups to Assess, Plan, and Innovate

Gregory A Smith
Chances are, having chosen to take part in the Computers in Libraries virtual conference, you’re interested in the application of information technology to libraries and related organizations. In my presentation, however, I want to draw your attention to a different kind of technology—social technology—that’s quite critical to the future of libraries and information organizations. Specifically, I’m referring to the kinds of social techniques that enable us to facilitate effective group work.

In this presentation I’ll be sharing five group facilitation techniques based on my personal experience and formal study in fields such as marketing research, design thinking, and organization development. I’ve used them with groups ranging in size from five to 20 or more.
In many cases, a well-led group can produce much better work than an individual. Such situations might include leading a focus group to understand community members’ perspectives; conducting a strategic planning process that will guide decisions for years to come; engaging in a design process to develop new or improved services, interfaces, or facilities; or leading a task force charged with finding ways to respond to thorny problems. In each case people are leading a process that will help to make the future of an organization or community a reality.
If groups are to function well, they need to observe norms—rules of engagement, if you will. Sometimes it can take some time for groups to figure out the rules by which they’ll function. I like to accelerate the development of group norms by suggesting rules of engagement up front.
Here are three basic rules that I’ve found helpful in group work, especially when the task at hand involves ideation. First, when a group is doing brainstorming, it’s important to separate the generation of ideas from their evaluation. If group members are allowed to critique others’ ideas prematurely, they’ll likely shut down creativity, so it’s best to let participants know that judgment will be withheld until a specific phase in the process. This relates to the second rule: achieving quality through quantity. A good ideation process may generate dozens of ideas. Even if only a few are good, that’s OK. If we aim for perfection, our creativity will be stifled, so we have to accept that bad ideas will emerge and will have to be weeded out at some point. Third, a group may include participants who vary widely in their experience, education, role, or status. I find it helpful to state up front that everyone will be on a level playing field during the group’s work. Good ideas can come from anyone and anywhere. Of course, once the rules are established, they have to be upheld.
Questions are extremely powerful. They may not tell participants what to think, but they suggest what to think about. They elicit thinking, so the better designed they are, they better. There may be a use for a generic, macro-level question in some cases, but I find it helpful to ask multiple questions that are chosen intentionally and focus on specific aspects of the issue(s) of concern.
Within the past month, did you and/or others ...

1. Learn something that will make you more effective at work?
2. Try something new, even if it wasn’t fully successful?
3. Stop doing something that was ineffective?
4. Improve a work process?
5. Solve a problem?
6. Complete a project (or reach a significant milestone in one)?
7. Create or produce something that you’re proud of?

Here’s an example of a reflection exercise that I used with 20-plus staff a year or so ago. I designed it based on Appreciative Inquiry principles to draw attention to successes that were happening in my organization—some of which were unknown to me and maybe to most others. By asking people to share their what they had learned, experiments they had conducted, improvements they had made, projects they had completed, et cetera, I was able to get people to talk about their successes and hopefully cultivate the emergence of more successes around the organization.
The third technique may seem counterintuitive. How can putting people in a box make them more creative? Allow me to illustrate.
Here’s a series of prompts that I put before a group that I had convened to work on optimizing their operations. You can see that the lead-in question is the same in all three cases. What’s different is the assumption. Notice that I’ve asked people to consider and response to three different scenarios. Some of these, such as relaxing standards, might have been controversial for group members to suggest. By putting that constraint on everyone for a portion of the exercise, I’ve given it some legitimacy. As a result, people may be more likely to discuss things that would have been considered “out of the box.” The fact that we repeat the prompt using different assumptions is significant; I’m not suggesting that we must improve performance in any particular way.
Groups respond well when you bring concrete resources to their attention as a basis for reflection and discussion. Here are a few examples.
This slide shows a portion of an anonymous survey that I administered to a group of 10 employees during a session where we debriefed our organization’s performance in the previous fiscal year. We were able to review the survey results immediately and identify the areas where we thought we needed to improve. Survey data—frankly, any kind of assessment or performance data—can be a powerful discussion enabler.
Here’s another example of using concrete resources to facilitate group work. When I was leading a team to develop a new core values statement, I showed them examples of other organizations’ core values. We didn’t aim to copy others, but to understand the range of possibilities available to us.
Finally, here are some signage prototypes that my library’s graphic designer produced. Having these in hand allowed another facilitator in my library to solicit specific feedback from others before having the final design produced and posted around our stacks.
By now you’ve seen a variety of activities that I and others have led groups to perform: a personal reflection exercise, a discussion of ways to improve performance, collection and discussion of survey data, et cetera. The point is that when you’re convening a group to work on some issue, it’s often helpful to plan a sequence of activities that lead naturally toward a desired outcome.
This slide shows a sequence of six activities that I led a group through, leading to the final stage, where we identified the most promising ideas that had surfaced during our discussion. Remember that rule about withholding judgment? Late in the process, it no longer applies. At some point you have to critique ideas and retain the best ones.
Here’s an illustration of a low-tech, low-stakes technique for retaining the most promising ideas that a group generates. I had each participant write a couple of post-it notes stating what they thought were the most promising ideas that had surfaced in the discussion. We read these aloud and made sure that group members understood them; we also collapsed any ideas that were essentially the same. Then I asked people to post their suggestions to the wall and we used stickers to vote for the ideas that we favored. We were able to identify some priorities quickly.
Facilitation is used in a variety of contexts. Market researchers conduct focus group interviews. Design teams engage in group sessions where they ideate, prototype, evaluate, refine, et cetera. Organizational development specialists assemble groups to conduct activities, including Appreciative Inquiry, intended to shape the culture. The list could go on. I’ve prepared a bibliography that suggests some good resources on group facilitation from several different professional and disciplinary specializations. Some of these sources are specific to libraries, while others are not.
I hope the techniques that I’ve shared have given you some ideas of how to lead better group work. You don’t have to be a manager to use them. If you are in management, you’ll probably find a variety of situations where you can put them to use.