



Generating and Organizing Ideas

Development of Self, Teams and Workgroups

LC Notebook Tab IV

Agenda

10 AM or 1 PM	Welcome & Introductions
	<i>Guidelines for Teams Review</i>
	Generating Bigger and Better Ideas
	Affinity Diagrams
	----- B R E A K (5 min.) -----
	Visual Explorer
	Flipcharting Basics Reviewed
12 PM or 3 PM	Additional Tools, Wrapup and Adjournment

Objectives. By the end of this session, participants will:

- Understand when you need to generate and organize ideas
- Understand how brainstorming and affinity diagrams can be used to generate and organize ideas
- Understand how visual images can be used as a technique to generate ideas
- Be aware of techniques for effective use of flipcharts
- Be aware of other tools available for organizing and generating ideas

Handout Quick Table of Contents:

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Development of Self and Teams

Generating and Organizing Ideas

Guidelines for Teams

As a way of assisting the Libraries' teams and workgroups in improving their efficiency and effectiveness, in Fall 2004 the Facilitators Team developed a resource for meetings and for working in groups entitled *Guidelines for Teams*.

The guide summarizes the fundamentals of good teamwork. It is composed of an introduction and 16 short sections. Each section is usually less than 500 words long and explains a central idea behind working in groups. Individual sections also include a brief list of resources for further reading – with a complete bibliography appearing at the end of the guide.

The guideline sections include:

- | | |
|---------------------------------------|---------------------------|
| 1. Introduction and Table of Contents | 10. Prioritizing |
| 2. Different Kinds of Teams | 11. Solving Problems |
| 3. Ground Rules | 12. Making Decisions |
| 4. Warm-ups | 13. Running Meetings |
| 5. Charge | 14. Meeting Evaluations |
| 6. Values | 15. Team Work Evaluations |
| 7. Vision | 16. Conflict Management |
| 8. Mission | 17. Request a Facilitator |
| 9. Creating a work plan | 18. Bibliography |

Of particular relevance to today's workshop are sections **10** (Prioritizing), **11** (Solving Problems) and **12** (Making Decisions). While not limited to these settings, the processes introduced today are designed to be particularly applicable in these instances.

The guide is available on the Facilitators' Team website (<http://www.lib.umd.edu/groups/facteam/>).

To access the full guide - go to <http://www.lib.umd.edu/groups/facteam/GuidelinesFinal050928.pdf>

Brainstorming Basics

Brainstorming allows:

- ↵ Exploration of new ideas and challenges to traditional thinking.
- ↵ Participants to place ideas on the table without fear of criticism.
 - Everyone can be part of the solution.
- ↵ Group members to separate the creation of ideas from any evaluation activity.

The goal of brainstorming: A long list of “bigger and better ideas” from which people can work.

Brainstorming Ground Rules

- ↵ Encourage everyone to contribute
- ↵ No judgment of ideas as they are expressed
- ↵ Develop a free flow of ideas
- ↵ Include enough words to convey a complete thought
 - Helpful tip: Use a verb
- ↵ Don't set limits on the number of ideas
- ↵ Remember: there are no bad ideas
- ↵ Debating is not allowed
- ↵ Encourage creativity
- ↵ Avoid “killer phrases” (see below)

The Basic Brainstorming Process

1. Select a topic for brainstorming
2. Clarify the topic with the group and reword in the form of a question
3. Explain the brainstorming process
4. Initiate the process
5. Record ideas as they are generated
6. Encourage broad contribution
7. Keep going after the first “natural pause”
8. When the group is truly out of ideas – go back and clarify each idea
9. Use another tool to sort or prioritize the data

“Killer Phrases” to Avoid in Brainstorming

- | | |
|--------------------------------|----------------------------------|
| ☒ That's dumb | ☒ They won't let us |
| ☒ It won't work | ☒ It will never fly |
| ☒ Are you serious? | ☒ It will cost too much |
| ☒ You're kidding | ☒ It's not practical |
| ☒ No one will go along with it | ☒ We don't have enough |
| ☒ It's good, BUT... | people/time/resources to do that |
| ☒ We've tried that before | |

Using Affinity Diagrams to Organize Ideas

What is it? Affinity diagrams help organize ideas, statements, and other language data.

Why use it? Affinity diagrams allow a group to creatively organize a large number of ideas/issues by natural groupings to understand the essence of a problem and possible solutions.

To create an affinity diagram:

1. Gather statements from the group

- ↵ Sources of statements: brainstorming, interviews, discussions within the group, etc.
- ↵ Read through the statements to make sure everyone understands each one.
- ↵ Eliminate duplication.

2. If not already in this format, transfer statements onto index cards or self-stick notes

- ↵ Write one idea per card.
 - **Helpful hint:** write legibly – so that cards can be viewed 4-6 feet away.

3. Group the cards to find an “affinity” or theme

- ↵ Shuffle the cards and lay them out, or randomly place self-stick notes on a flipchart, wall or table.
 - **Helpful hint:** tape blank flipchart paper to the wall first – and attach notes to the paper, rather than directly to the wall.
- ↵ Have group members read each card or note slowly to ensure they are understood.
- ↵ Silently group cards/notes together that intuitively seem to work together
 - Let the cards “sort themselves”.
- ↵ If someone disagrees with a placement – they can move the card to another group without discussion. If another group member disagrees with the move – the card can be moved back.
 - If a card/note is moved three times – make a duplicate and place one copy in each grouping.
 - **Helpful hint:** It is o.k. for some notes to sit alone – these can still be important concepts.

4. Label the groups of cards

- ↵ Examine one group of cards/notes and discuss what they have in common.
- ↵ Determine the common theme (in 3-5 words) and create a header card for the grouping.
- ↵ Continue creating labels for all groupings.

5. Group clusters into “superclusters” (optional)

- ↵ If several clusters seem to go together, group them as a “supercluster”.

6. Draw the diagram

- ↵ Place related groupings close to each other.
- ↵ **Helpful hint:** In a typical affinity diagram – there are 5-10 groupings of ideas.

Adapted from: Peter R. Scholtes, Brian L. Joiner, and Barbara J. Streibel. *The Team Handbook*. 3rd edition. Madison, WI: Oriel. Pp. 3-17-3-19.

Brainstorming Options and Alternatives

- ↵ **Flipchart with free-for-all** -- (a.k.a. “Popcorn” method). A scribe writes down ideas as group members shout them out.
- ↵ **Flipchart with turn-taking** -- Group members take turns offering ideas which are scribed on the flipchart. Begin with some silent time for members to develop ideas.
- ↵ **Silent brainstorming** -- Group members write down ideas on post-its or sheets of paper and then share ideas.
- ↵ **Visual brainstorming** -- Group members are asked to draw a picture of something. [E.g. – How would the ideal organization chart for PASD look?]
- ↵ **Analogies/free association** -- Ask the group to compare to another entity. For example, “If our problem was an animal – what kind would it be?”

- ↵ **Brainwriting**
 - **Using forms** -- Groups of five or six participants write three ideas on a form. Participants add ideas as they pass the forms among themselves. In the first round – the group members have 5 minutes to write three ideas on a form, they then pass the form to the group member on their right – who adds 3 more ideas. Repeat until forms return to originators. Together as a group, review ideas, clarify, and remove duplicates.

 - **Using notecards or self-stick notes** -- (a.k.a. anonymous brainstorming). Members silently write ideas on notecards or self-stick notes and place them, folded, in the center of the table. Each member takes the same number of cards or notes from the center as they contributed and adds to them. Together as a group, review ideas, clarify, and remove duplicates.

Helpful Hints for Anonymous Brainstorming and Brainwriting

- ↵ Write clearly so others can read your ideas
- ↵ Write in full sentences so others can understand your ideas
- ↵ It is o.k. to build on other’s ideas
- ↵ It is o.k. to leave a blank if you are out of ideas

Using the Visual Explorer

Applications

The Visual Explorer is a tool for sense-making--for exploring, appreciating, and reconstructing the assumptions, emotions, and various perspectives underneath a complex issue. Sense-making is a prerequisite for effective decision-making in ambiguous situations. Visual Explorer is not intended to be used when the task is to make a purely analytical decision.

Examples of situations for which the Visual Explorer may be appropriate are:

- Exploring strategic challenges
- Knowledge mapping and building
- Making sense of survey feedback or other data
- Exploring perspectives and values, and creating shared vision
- Dialogue
- Concept development
- Exploring and achieving consensus
- Performance dialogue (leading into performance appraisal)
- Imagining the past, present and future

Benefits

Some of the ways Visual Explorer can contribute to making shared sense of complex situations are:

- Generating metaphors and fresh language
- Making the tacit explicit
- Supporting appreciation of ideas and empathy for emotions
- Surfacing and synthesizing diverse perspectives, opinions and assumptions
- Eliciting stories
- Seeing patterns and connections
- Tapping into personal passions
- Asking powerful questions
- Exploring identity (group and individual)
- Exploring emotions
- Sparking humor and levity
- Crossing functional and cultural boundaries
- Asking "What are we missing? What's been left out?"
- Building on others' ideas
- Seeing details
- Seeing the big picture
- Imagining alternatives

Sample Framing Questions for Initiating a Visual Explorer Session

- How do you understand this challenge we face? What do you know about it? What is confusing? How does it feel? What are you (or we) avoiding or overlooking?
- What is your passion? In what part of your life are you most creative? What is your art? What gets you out of bed in the morning?
- Who are you? Who are we? What is your / our mission?
- What is your / our greatest strength?
- What are your hopes for ____? What are your fears about ____? What keeps you awake at night? What would help you sleep?
- What do you wish to be your legacy to the community? What will you / we leave behind when your / our work is finished? How would you / we like to be remembered?
- Pick three images: One representing your past, one for the present, and one for the future.
- [As part of a performance appraisal:] Choose a picture that captures your best work this year. What have you accomplished? What frustrated you? What would you do differently?

Adapted from the Visual Explorer User's Guide - ©1999, Center for Creative Leadership

Flip Chart Tips

General Tips

- Print clearly and legibly
- Use the “6 X 6 Rule” - six words per line, 6 lines per page
- Don't worry about spelling and punctuation
- Take your time when writing
- Use water-based markers, rather than dry erase markers. This will result in better saturation, darker colors and less odor!
- Use different colors to highlight and separate points
 - Use no more than three colors per page
- Use bold colors - blue, green, black - for writing
 - Use red for emphasis, avoid yellow, pink and orange which cannot be seen clearly
 - NOTE: Red may be difficult for people with color blindness to read

For Meetings

- Avoid sentences - focus on key words and phrases
- Summarize and abbreviate - use participants' own words
- Ask people to repeat and clarify as needed
- Use symbols - arrows, circles, asterisks, underlines - to link points and show emphasis
- Number each sheet and post pages when filled
- When writing on the flip chart, try to stand to one side so people can see what you have written
- Write, then turn and talk to avoid talking to the flip chart with your back to the audience

For Presentations

Use flip charts to:

- ✓ Focus an audience's attention
 - ✓ Give visual expression to ideas and concepts
 - ✓ Communicate what words cannot
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- Whenever possible – prepare your flipcharts in advance
 - Confine flip chart use to groups of 25 people or less
 - Use letters one inch in height for each 15 feet the audience is away from the chart
 - Use top $\frac{2}{3}$ of page so audience can see all of page
 - Write lightly in pencil next to your key points
 - Write out the information for the flip chart pages on regular paper first
 - Leave a blank sheet between each page so information won't peek through
 - Use clear tape or post-it tabs to mark pages you might want to refer to
 - For mistakes, use white out or cover it with white paper

Adapted from “Flip Chart Tool Training” – Sue Baughman – May 2004

Additional Resources for Generating and Organizing Ideas

Bens, Ingrid. *Facilitation at a Glance!* [N.p.]: A joint publication of Goal QPC and AQP, 1999.

Brassard, Michael, and Diane Ritter. *The Memory Jogger II*. [N.p.]: Goal/QPC, 1999.

“Flip Chart Tips” - <http://www.lib.umd.edu/groups/facteam/Flipcharttips.doc>

Scholtes, Peter R., Brian L. Joiner, and Barbara J. Streibel. *The Team Handbook*. 3rd ed. Madison, WI: Oriel, 2003.

The Visual Explorer. Center for Creative Leadership, ©1999.

Techniques (& where to find them)	Use When You Want To:
Brainstorming, Brainwriting <ul style="list-style-type: none"> ○ <i>Facilitation at a Glance</i> – pp. 134-137 ○ <i>Memory Jogger</i> – pp. 19-22 ○ <i>The Team Handbook</i> – pp. 3-13–3-14; 8-2–8-4. 	Generate a high volume of ideas on any topic. The process is free of criticism and judgment.
Affinity Diagram <ul style="list-style-type: none"> ○ <i>Memory Jogger</i> – p. 12-18 ○ <i>The Team Handbook</i> – pp. 3-17–3-19 	Generate a large number of ideas or issues, then organize and summarize them to understand the essence of a problem.
Nominal Group Technique/Multivoting <ul style="list-style-type: none"> ○ <i>Memory Jogger</i> – pp. 91-94 ○ <i>The Team Handbook</i> – pp. 3-14–3-17 	Rank ideas or issues for consensus.
Interrelationship Digraph <ul style="list-style-type: none"> ○ <i>Memory Jogger</i> – pp. 76-84 	Identify, analyze, and classify the cause and effect relationships among issues.