

Tools We Can All Use

Learnings and Practices compiled by Anne E. Herman, Ph.D.

Integrating multiple resources and ingenious things came from *Super Smart People* such as Jeffrey Saltzman, Jeffrey Jolton, Sara Weiner, David Peterson, Karen May, Roni Reiter-Palmon and others

Learn from yesterday, live for today, hope for tomorrow. The important thing is not to stop questioning.

Albert Einstein



BECOMING A LEARNING ORGANIZATION

- Systematic problem solving
 - Rely on the scientific method - Plan, Do, Check, Act
 - Insist on data (and tools to organize data) – not assumptions – in order to make decisions
- Experimentation
 - Use small “experiments” in order to produce incremental gains in understanding and knowledge
- Learning from past experience
- Learning from others
- Transferring knowledge

TOOLS – FREE TO USE!

- Action Review
 - Before Action Review (BAR)
 - After Action Review (AAR)
- Adaptive Action Framework
- Focus Groups
 - Students
 - Staff
 - Parents
- Reflection Practice



ACTION REVIEWS

- Before Action Review (BAR)
 - Clarify intent, expectations, and assumptions about the “why” and anticipated impact of an activity
 - May identify anticipated issues
- After Action Review (AAR)
 - Provides a review of the phases of the work
 - Should occur as soon as possible to allow for the most “fresh” memories



ACTION REVIEWS

- Who?
 - People who are responsible for the activity or work
 - Approximately 3-8 people (no more than 10)
- How much time do you need?
 - At a minimum 30-60 minutes
- How does it happen?
 - A facilitator leads the group through a list of questions (mostly open-ended)



BEFORE ACTION REVIEWS – EXAMPLE QUESTIONS

- What are we wanting to accomplish?
- What insights do we have from previous practices?
- What will be our indicators of success?
- What challenges might we face?
- What things can help us be successful?
- How can we best avoid issues?



AFTER ACTION REVIEWS – EXAMPLE QUESTIONS

- What did we expect to happen?
- What actually happened?
- What could explain the differences?
- What worked well?
- What did not work well?
 - Why?
- What would we do differently in our next opportunity?



MODEL OF EVALUATIVE THINKING

- Adaptive Action Model
 - What?
 - So what?
 - Now what?



ADAPTIVE ACTION MODEL



GETTING STARTED: WHAT TO THINK ABOUT

- How to focus
- What questions to ask
- Who to include in dialogue
- How quickly or slowly to
 - Observe
 - Analyze data
 - Take decisive action



WHAT

- Depends on diverse points of view
- Purpose is to explore the widest possible range of reasonable interpretations
- To do:
 - Observe and collect data
 - Listen to stories
 - Use multiple information sources
 - Depend on wise practitioners
 - Explore different fields of study/practice
 - Listen to your intuition



LESSONS FROM “WHAT?”

- Start where you are
- Dump your assumptions
- Notice the patterns
- Reveal the complexity in the tale



SO WHAT

- Compare/contrast past, present, future
- Compare/contrast micro, meso, macro cycles
- Compare/contrast local, regional, national
- Analyze and synthesize
- Ask why, what if, how, when?
- Brainstorm options for action
- Play out scenarios
- Seek multiple points of view



LESSONS FROM “SO WHAT?”

- Share the exploration (include others)
 - Use inquiry and dialogue
 - Nurture generative relationships
 - Ask useful questions
 - Document, document, document
- Visit the extreme edges
 - Challenge general wisdom
 - Use multiple models
 - Look for exceptions
- Find what fits
 - Look for strategies that will increase fit in the system as a whole



NOW WHAT

- Consider many options for action
- Pick the best option (do no more than 3)
- Choose something less difficult, most likely to succeed
- Communicate
- Set expectations
- Plan to test expectations in next What?
- Determine when you'll "What?" again



LESSONS FROM “NOW WHAT?”

- Have a plan and hold it lightly
 - Plan for your situation
 - Set a timeline
 - Develop measures for success
 - Clarify roles and expectations
- Just do it
 - Start with what is easy
 - Do NO MORE than 3 things (try to pick 1)
 - Keep it simple
- Begin again
 - See where you are now
 - Learn from failure
 - Move to the next “What?”



“WHAT?” QUESTIONS FOR US TO USE

- What is the data and/or information stating?
- What pieces stand out to you?
- What data and/or information is missing?
- What other information do you know from other sources that is important to share?
- What is (are) something(s) that a client(s) has (have) shared about transportation in our area?



“SO WHAT?” QUESTIONS FOR US TO USE

- What is the “picture” of our current status?
- What does this mean for the work we do?
- How does this change our clients’ needs?
- What is the impact of XX on the systems that affect our clients?
 - What are those systems?
- What options do we have for action that can shift the patterns to make the system more adaptable, more sustainable, more fit?



“NOW WHAT?” QUESTIONS FOR US TO USE

- Who’s doing what?
- When?
- For how long?
- What resources do you need?
- Who needs to know about it?
- How are you going to know when you are finished?
- When will you plan to begin with your next “What?”



CONDUCTING FOCUS GROUPS

- Always provide a set of ground rules
- Suggested ground rules to consider
 - Participation is ALWAYS voluntary
 - It is completely ok not to discuss specific topics if you are not comfortable
 - There are NO right or wrong answers
 - Show respect to others even if you do not agree with their input
 - Share as much as you feel comfortable
 - Honor others' privacy by keeping what is shared in here confidential



CONDUCTING FOCUS GROUPS

- DO
 - Use a warm up
 - Notice participants' nonverbal signals
 - Ask open-ended questions
 - Ensure all participants contribute
 - Keep the discussion focused / on topic
 - Gather exact information shared
 - Confirm with participants to ensure you understand what they are saying



CONDUCTING FOCUS GROUPS

- AVOID
 - Using a script verbatim
 - Finishing participants' responses
 - Allowing a few participants to dominate the conversation
 - Taking sides or challenge what is being said; stay impartial
 - Letting others have side discussions
 - Sharing your own opinions
 - Paraphrasing participants' responses when gathering data
 - Favor one participant over the others
 - Using technical language or jargon



CONDUCTING FOCUS GROUPS

- Closing the session
 - End the discussion by summarizing the main points
 - Thank the participants for their time and contributions
 - Collect and save all notes and recordings
 - Advise when the aggregate summary will be available and how they can access it
- Analyzing and Leveraging the Results
 - Identify common themes across responses and respondents
 - Ensure confidentiality in every way – remove ALL identifying information
 - Use caution in using the insights; the input reflects those participants' thoughts, but likely does not provide a full representation of your entire stakeholders' perceptions



REFLECTION CHALLENGE

1. Daily (5 minutes)
 - What new thing did I do today?
 - What did I learn?
 - What one thing will I do differently tomorrow?
2. Weekly (10 minutes)
 - What progress did I make last week?
 - What do I need to focus on next week?
3. Monthly (15 minutes)
 - How am I doing on my learning objectives?
 - What do I need to do to keep growing?
 - How will I get meaningful feedback?



REFLECTION CHALLENGE

4. Quarterly (30 minutes)

- What do I need to manage my personal growth and/or professional development more effectively?
- What is most important for me to develop going forward?

5. Annually (1 hour)

- Am I on a path to become the person I really want to be?
- Where do I stand relative to what truly matters to me?
- Where do I want to be a year from now and how do I get there?
- How do I make sure I'm not missing something important?



QUESTIONS OR THOUGHTS?

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