

FOCUS AREA 4 ACTIVITY

Improving Processes with Curiosity

Sometimes things don't work the way we planned. Use this activity to figure out where process and systems break down and strategize a new approach.

BACKGROUND

"Never a failure. Always a lesson."

The origins of the common phrase are unknown, but the message isn't. When we see things as failure, they become fixed and unchangeable in our minds. If we want to improve systems, we need to create space to reflect and learn from what isn't working or didn't go the way we expected.

PREPARING FOR THE ACTIVITY

Estimated time for this activity:

45-90 minutes

You can tailor this activity to:

- Individuals
- Program teams
- Individual departments
- Management + leaders
- Whole organizations
- Community feedback groups
- Partner meetings

For small group discussion, aim for 3-5 people per group.

Activity objectives:

Team members will be able to:

- Map out how a process is actually working
- Identify where you can update, improve, or eliminate processes or steps
- Implement 1-2 changes to address the challenge you've identified

Items you may need:

- Sticky notes, ideally at least 2 different colors
- A virtual Whiteboard

ACTIVITY INSTRUCTIONS

1. Identify your problem

Before assembling your group, identify the problem or challenge you want address. This could be an event that didn't go as planned, a process that isn't working as you hoped, or a concern brought up through participant feedback.

2. Assemble your team

Who you invite to the conversation will depend on the problem you want to solve. Think about:

- Who has unique insight into this problem?
- Who is directly involved in the process?
- Who has power to change the process?

Before meeting, explain to the group what problem you want to discuss and why you've included these folks in the conversation.

3. Document and reflect the current process and challenges

You can take a few approaches to documenting and reflecting on how systems are currently working:

Option A. *In-person or virtual*

Before or during your meeting, have team members walk through the steps in the process as if they are the intended audience. Ask them to write down what happens, what feel easy or challenging, and what's unexpected.

In small groups, have each team member share their experience. Ask them to note any differences between their experiences and parts that felt challenging or unexpected. Have them to identify what they think are the top 1-2 things leading to the problem you want to address.

Bring everyone back together. As each group shares their top 1-2 issues, take notes on a whiteboard or shared document that everyone can see.

ACTIVITY INSTRUCTIONS CONTINUED

Option B. *In-person*

On a wall that everyone can see, use sticky notes to write out the process as it is currently happening. As a group, talk through the process and write one step on each sticky note. Place the sticky notes in order.

On different colored sticky notes, ask small groups or individuals to write down:

- Any steps that aren't happening the way you intended
- Suggested changes your organization can make to address the problem

They can place their sticky notes on the wall where they fit into the process.

Give team members time to individually read all the sticky notes. Before moving on, take a few minutes for team members to share anything they think is missing from the wall.

Tip: It can be helpful to have different colored sticky notes for:

1. Audience actions in the current process
2. Your organization's steps in the current process
3. Any steps that aren't happening the way you intended
4. Changes your organization can make to address the problem

Option C. *Virtual*

Before the meeting, create a virtual flow chart of the current process. You could use a tool like Miro or Zoom.

Break team members into small groups. Ask them to review the process flow chart you created. Have them make notes on the Whiteboard for anywhere the process isn't working as intended. Have them identify what they think are the top 1-2 things leading to the problem you want to address.

Bring everyone back together. As each group shares their top 1-2 issues, take notes on a whiteboard or shared document that everyone can see.

ACTIVITY INSTRUCTIONS CONTINUED

4. Identify 1-2 changes

Ask team members to share possible changes to address your problem. Write their ideas on a whiteboard or shared document that everyone can see.

In small groups, ask team members to talk through each idea:

- How will this address our problem?
- What unintended consequences could this lead to?
- Do you have the capacity to make this change?

After discussing, ask each group to choose their favorite idea.

Bring the whole group back together. Keep a count of each group's favorite idea on the whiteboard or shared document. At this point you may have 1-2 ideas that are clear favorites. If not, ask the group to vote on the top 4-5 ideas to select the 1-2 changes you're going to try.

5. Plan to reassess

Before your group disassembles:

- **Identify what signs will indicate the new system is working:** When it's time to reassess, what are you going to look for to know if the process is working better?
- **Decide how you will measure the impact:** How will you document the information you need to know if the issue is resolved?
- **Choose a time to meet again:** Make sure you give yourselves enough time to try the new process and observe the results.

When you meet again, you can repeat step 3 to map out the process and identify any additional growth areas.

Improving Processes with Curiosity

Use this worksheet to map out how a process is currently working. Use your map to reflect on opportunities for improvement. Then, identify 1-2 changes you can try.

1. What challenge or problem are you trying to address?

Tip: It might be helpful to state what you hoped would happen and what did happen.

2. Use the space below to create a flow chart showing how the process is currently working, even if it's not ideal. Alternatively, you can also use an online tool like Canva or Miro to visualize the process.

3. Look at your flow chart on the previous page, and identify where you see issues in the process. You might write notes on the page, circle problematic steps, or cross out things that shouldn't be happening. If you can, use a different color ink so your notes contrast with the flow chart.

4. Identify possible ways to improve the process. Don't attach judgement to your ideas yet or say things like "that will never work!" until you've taken some time to brainstorm.

5. In the chart below, write down that changes you're going to make, how will document or measure the impact and a date to reassess.

Tip: Only make 1-2 changes at a time. More than that and it can be difficult to manage. You also may find it difficult to identify which changes are leading to which results. Or if you get too overwhelmed, you might stop before you start.

Describe the change you're going to make	Decide how you will document or measure the impact	Set a date to reassess
<i>Example: Update the web content about community events to be more clear and less overwhelming</i>	<i>Example: Review how many people sign up for events compared to previous quarter and same time last year</i>	<i>Example: Revisit end of the quarter</i>