Facilitating a Working Group with Your Organization

The human insights process is collaborative and requires a team of diverse players. It operates best in an inclusive environment where staff can contribute, learn from one another and challenge one another. It’s also a lot of work: having multiple people involved can help spread out the workload while ensuring that you leverage the diversity of your team’s experiences and perspectives to interpret what you find and build solutions.

Steps in This Activity

Step 1. Identify Your Leads
Step 2. Secure Buy In from Organizational Leadership
Step 3. Assemble Your Team
Step 4. Host a Kickoff Team Meeting

Expected Time: 2 hours

Expected Results: By the end of this activity, you’ll have identified the project leads, secured the necessary buy-in from leadership and developed a team of collaborators.

HOW TO

Step 1. Identify Your Leads

Designate one to two individuals to lead this project. Leads are responsible for driving the process forward (e.g. setting up a timeline, scheduling meetings and delegating key tasks to other team members). Ideally, leads should include:

- A manager within your organization who holds key decision-making authority over components of the program you seek to design or improve.
- A frontline staff person who has frequent interactions with clients.

These two roles complement one another. While a manager plays a critical role in ensuring that the innovations you design are not created in vain, the frontline staff person serves as a conduit for the client perspective at all times and helps to ground the process in the reality of their experiences interacting with clients on a daily basis.

Leads

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<th>Manager:</th>
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<td>Frontline Staff:</td>
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Helpful Hint: Outside Facilitators
If you’re concerned about staying on track or motivated throughout this process, it may be worth seeking an outside facilitator. External facilitators can’t replace your internal leads, but they can be a helpful force when momentum slows down or your plate fills up with other significant priorities. Outside voices can also offer a fresh, insightful perspective without the baggage of being involved in your day-to-day work.

Step 2. Secure Buy In from Organizational Leadership

We recommend getting leadership on board with your project early in the process. They don’t need to be involved in every meeting you have or even every step of the process, but they should be engaged at the very beginning and at key decision points to ensure that you have the support you need to carry out each step of the process.

This step ensures that you get the support of the necessary leaders in your organization before moving forward. Depending on the size of your organization and the scope of your project, however, the leaders you need to engage may differ. For example, if you’re embarking on this process to refine a specific aspect of an existing credit counseling program offered by a large agency, you may only need to involve the department head. However, if you’re seeking to wholly reinvent an DMP within a small agency with 15 staff, you may need to engage the President of the organization.

Having trouble identifying the right leaders to engage? Ask yourself the following questions:
1. Who is your supervisor? Your supervisor’s supervisor?
2. Who is responsible for securing funding to support this program?
3. Who has ultimate ownership for your organization’s progress toward its long-term outcomes?
4. Who might prevent you from achieving your ultimate goal?
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Once you’ve identified the appropriate leaders, schedule a brief meeting with them to:

- Explain your initial thoughts about the problem you want to solve.
- Offer them a description of the human insights process and a summary of why you think it’s a valuable approach for your organization to undertake.
- Secure their approval to move forward and commitment to your goals.

**Step 3. Assemble Your Team**

While the leads hold greater responsibility for driving the process forward, additional team members can help develop solutions or assist with various activities. We recommend building a team of no fewer than 3 but no more than 6 members.

Having trouble identifying the right team? Ask yourself the following questions:

1. Whose buy-in do you need in order to ultimately move forward with a solution generated through this process? Who still needs some convincing? You may want to include:
   a. Frontline staff who will play a critical role in piloting or ultimately implementing any potential solution
   b. Operational staff who will play a critical role in piloting or ultimately implementing any potential solution
   c. Leadership, especially if they are skeptical about the value of the process, are unconvinced that a problem exists in the first place, or simply haven’t prioritized the problem you’re seeking to address
2. Who else has decision-making authority over key components of your program? For instance, is there an operational component of your program that would require permission of your IT specialist before making significant changes?
3. Who else has specific skills you might need to move your innovation forward?
4. Who else interacts with clients in a different way? If your organization has multiple touch-points with clients, consider staff who interact with them at different points along that continuum.
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Step 4. Host a Kickoff Team Meeting

Use your first team meeting to set common expectations, establish the ways you’ll interact with one another and communicate throughout the project, and get feedback on your problem.

Example: AIM CCCS

**Team Meeting Agenda**

1. Explain the human insights process.
2. Share your challenge and explain your reasoning. Discuss your team’s reactions:
   a. What do you think of this design challenge? Why?
   b. Do you think solving this problem is a priority? Why?
   c. Is there anything else about the program that you’d like to change? How would you prioritize that in comparison to the challenge? Why?
3. Determine the length of the project and how you will structure your work (i.e., setting aside 2 to 3 hours a week over 12 weeks or an intensive 3- to 4-day workshop).
4. Set a regular meeting time.