Facilitation Guide – In-person Workshops

Design Thinking for Student Projects

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Notes:

The guide accompanies the textbook **Design Thinking for Student Projects**

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The latest version of the guide is stored on our website:

https://study.sagepub.com/designthinking

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Introduction and Context

Who is the facilitation guide for?

This document accompanies the textbook **'Design Thinking for Student Projects'.** Whereas the book is aimed at students, many of the accompanying online resources are written for academics and others seeking to develop or improve modules, training courses and other activities focused on one or more of the following areas:

- Team-based projects
- Design Thinking and associated techniques
- Development of innovative solutions to address real-world challenges
- Development of key employability skills

The facilitation guide can also be used by students and others working independently who wish to facilitate physical in-person innovation workshops using Design Thinking and related techniques.

What does the guide contain?

The guide contains the following:

- Advice on workshop rooms, logistics and materials

- Advice and instructions for planning and running physical in-person workshops using Design Thinking and related techniques, including management of multiple parallel workshops

- A worked example based upon an Idea Generation workshop

- Hints and tips for facilitators

- Hints and tips for workshop attendees

Workshop Room Logistics and Materials

Get a (suitable) room

One of the key enablers for running successful Design Thinking and similar workshops is to provide a suitable space for collaborative working.

Sufficient space is required to carry out divergent and convergent exercises. This should ideally include:

- A table – for each team.

- A comfortable seating space – for each team member at their team's table, providing the ability to work alone (diverge) at times and collaborate (converge) with their teammates at other times, as directed by the workshop facilitator.

- Clear standing space – ideally next to or near to the team's table, adjacent to an area of blank wall space dedicated to the team's use.

- Wall space – a suitably sized wall surface for attaching flip charts, without damaging the wall's surface (see additional details under Workshop Materials below).

- Power supply – If making heavy use of laptops, the room will need availability and access to power supply and power sockets.

- If running multiple parallel workshops, the room should be configured to give all teams sufficient table and wall space to work in, and the ability for attendees to see and hear the workshop facilitators or teaching staff and any materials displayed on screen.

- The room we personally use in our own module is a rectangular-shaped collaborative teaching space.
    - It has a teaching position in the centre of the room, with tables spread around all four of the room's walls.
    - Each table has its own screen, which can be configured to show facilitation and teaching materials or be used by the team sitting at the table.
    - We assign teams to use the tables alongside one of the longer walls and down each of the two shorter walls at either end of the room. This leaves a set of tables behind along the wall behind us unoccupied. This configuration means we never have to turn our backs on our students and can give all teams equal attention.

We understand some traditional classroom and lecture theatre-based environments are not conducive to providing all of the above.

- Some classroom environments do not provide a suitable wall space and/or sufficient wall space for multiple teams.
    - If this is this case, self-standing table-top flip chart packs can be used as an appropriate alternative. Although perhaps not 1,000% ideal, the authors have used these successfully with students and companies.
    - Another alternative is to use an online visual collaboration tool, such as MURAL or Miro, as a platform for creating and storing workshop artefacts, even when working in a physical room. If you take this approach, all workshop attendees will need access to their own laptop, tablet or similar device. The book's authors have successfully used this approach for teaching and facilitating workshops. Additional details for using these tools are available in the accompanying 'Facilitation Guide – Online Workshops' document.

- Some classroom environments do not provide suitable collaborative table spaces. Traditional tiered lecture theatres, for example, often don't provide a suitable environment for team-based working.
  - This can be a major issue. Thankfully, in recent years many institutions have invested in specialist collaborative teaching, innovation and/or design spaces. However, access to these rooms is often in high demand.
  - Our strong recommendation is to agree your requirements and book the most suitable room available to meet them as soon as possible. We also recommend visiting allocated rooms well in advance to verify their suitability, particularly in larger institutions where many rooms may not be familiar to you.

Workshop materials

Great, you've got your room booked. What else do you need?

Here's a suggested checklist for materials. Remember to budget for, and order, stationary well in advance of the class or workshop.

Note: Many of the items included below will not be required if you decide to use an online visual collaboration tool, such as MURAL or Miro, to create and store workshop artefacts. In this case, the main requirement will be for each student to have access to a laptop, tablet or similar device.

For each team

- Sufficient flip charts – with a few spares – for each team to complete each activity during the class or workshop. Our view is that's it's always best to have too many, rather than bring too few, to remove the risk of running out.
  - As detailed above, if you don't have access to wall space but do have tables, you can use self-standing table-top flip chart packs as an alternative to the wall, or use an online collaboration tool, in which case each attendee will need access to a laptop, tablet or similar device.

- Sufficient adhesive putty, tape or suitable alternative to attach the flip charts to the wall space.
  - Please do check in advance you're allowed to fix things to the wall and test the sticking method to ensure it doesn't damage the wall's surfaces. One of the book's authors has an embarrassing memory of creating a series of small but rather prominent holes in a wall covering in a company's expensive-looking executive meeting room!
- Sufficient good quality 'Post-it'-style sticky notes for team members to populate each activity during the class or workshop. Again, our view is that's it's always best to have too many, rather than risking running out.
  - Our preference is for relatively small 76 mm × 76 mm multicoloured square post-its – big enough to write short phrases but too small to hold long paragraphs of text.
  - The reason for stating 'good quality' is that some inferior brands tend to peel off and drop to the floor far too easily. If this happens, it can cause chaos, so it's best to check this out beforehand and get better-quality ones, rather than risk this happening to you!
- Coloured marker pens for writing headings and creating templates on flip charts.
  - These are also useful for certain converge activities which need a scribe to capture and write the team's collective input.

For each workshop attendee

- One or more 'Sharpie'-style pens for writing on sticky notes.
  - Ideally the nib should be sized to make it easy to write a short sentence or phrase on a sticky note. The written words (depending on the handwriting!) should be big enough to be easy to read, without being too big that attendees can only fit on one or two words.

- o If possible, avoid using pencils or biros (the output is usually too narrow and not easy to read) or marker pens (these are usually much too thick).
- A laptop, tablet or similar device – this may be optional depending on the activities carried out, but they are often useful to have for carrying out research and accessing notes during diverge activities, and (as detailed above) will be needed it is decided the workshop will make use of an online visual collaboration tool such as MURAL or Miro.
  - o If making heavy use of laptops, you'll also need to consider and plan for the availability and access to power supply and power sockets.

For facilitator(s)/teaching staff

- Laptop, tablet or similar device for presenting.
- Projector, or other device, and screen for sharing instructions and examples.
- Flip charts and flip chart stand, or wall space, for capturing key points, questions and/or discussion items to 'park' until after the class or workshop.
- Coloured marker pens for writing on flip charts.
- One or more 'Sharpie'-style pen for writing on sticky notes – although the facilitator usually doesn't take part in content development, it can sometimes be useful to slip in the odd provocative thought here and there!

Workshop Planning and Delivery

Setting objectives

Each class or workshop will, of course, be different. Without wishing to stray too far into pedagogical methodology in this document, it will be important to define both learning- and project-related objectives. These might have significant overlaps or be quite distinct.

For example, a class or workshop focused on idea generation might include learning objectives focused on the development of collaboration and communication skills. In

contrast, the project-related objectives might centre on identifying and articulating one or more ideas to progress to the next stage of the project.

Workshop planning

The **'Design Thinking for Student Projects'** book includes 20+ facilitated activities. A number of these will usually be combined to run in a single class or workshop. Which and how many of the activities should be run in the same class or workshop will depend on a number of factors, including the stage of the project, the time available for the session and so on.

To make this guide as useful as possible, we've opted to include advice, guidance and recommendations through use of a worked example. For this, we've selected planning and running an **Idea Generation Workshop**, consisting of four discrete activities, with a time limit of 2 hours.

1. Review of existing knowledge (diverge)
2. Idea generation – using the Big Ideas technique (diverge)
3. Idea prioritisation – using the Prioritisation Grid technique (converge)
4. Idea selection and description (converge)

Planning steps include:

- Define the learning and project objectives, as outlined above.
- Design the workshop session content, delivery approach and logistics to successfully enable attendees (e.g., students) to work effectively in their team(s) and meet the session's learning and project objectives.
  - As this is most academics' bread and butter, we haven't included further details of how to do this here.
- Ensure the appropriate workshop room logistics and materials will be available.
  - This is covered in quite a lot of detail above, although it's worth repeating the recommendation that if you don't know the room, do plan to visit it beforehand

to verify its suitability and get a feel for how you're going to position the attendees and facilitate the session.

- Identify and invite attendees.
  - o If this is a timetabled session, students will (of course!) already have the session in their timetables, but any additional facilitators and/or industry guests may need to be invited.
  - o If the workshop is taking place outside timetabled activities, the session will need to be scheduled, the room booked, and appropriate attendees identified and invited.
- Communicate workshop objectives.
  - o These should be communicated to the attendees prior to the session (e.g., as part of the closing summary of the previous week's session or via email) and included in the introduction of the planned workshop.
  - o For the Idea Generation workshop, the project-related objectives are to generate and prioritise new ideas and select and articulate a prioritised idea to progress to the next stage of the project.
- Set up and communicate any prerequisite preparation activities needed.
  - o For the Idea Generation workshop, we personally mandate our students watch a pre-recorded online mini lecture we've created on Creativity Techniques ahead of the session.
- Create an overall structure with timings for the workshop.
  - o This should include the introduction, each activity, suitably scheduled breaks, and time for playbacks and a summary of actions and close of the session.
    - ▪ It's important to include suitable breaks for attendees (if not the facilitators!). The timing of breaks is also important.
  - o For the Idea Generation workshop, we've suggested a potential structure with timing and activities in the 'Workshop Delivery and Facilitation' section below.

- Think through workshop delivery, including generating empathy for the attendees, to identify and address things which may potentially go wrong.
  - o As this is what most academics and workshop facilitators will do anyway, we haven't included extra details of how to do this here.

Workshop Delivery and Facilitation

In this section, we've assumed you'll be facilitating multiple teams running workshops in the same session. Generally, we have 10 or 12 teams in a room-based workshop, facilitated by two members of staff. In this case, we usually allocate each member of staff to support half of the teams. When we do this, we tend to rotate support, that is, if one member of staff will support Teams 1–6 one week and Teams 7–12 the next, and vice versa.

If you're facilitating a workshop with a single team, lucky you! You can simply ignore the points made below about managing multiple teams and focus on the specific recommendations we've included for you.

Setting up the room

- Whenever possible, we attempt to get into the room before the attendees are scheduled to arrive, and carry out any required set up tasks beforehand, although we appreciate this isn't always possible.
- For an Idea Generation workshop, we'd look to ensure each team has an allocated table, chairs and suitable wall space to work at. We'd also place the required workshop materials (flip charts, marker pens, sticky notes, 'Sharpie'-style pens) at each team's table and set up a separate table with spare items in case the teams need more during the session.
- When facilitating a workshop for a single team, we sometimes create the required Design Thinking templates on blank flip charts (in this case Big Ideas and Prioritisation Grid) beforehand, ready to place on the wall during the session, or even

place them on the wall before the session starts, to save time during the workshop on this administrative task.

Facilitating the workshop

Apologies if we've gone over the top a little bit below, but here's how we'd facilitate the worked example of an Idea Generation workshop.

We've assumed the previous week's workshop was focused on understanding and generating empathy for end users, including creation of an End-User Persona, Empathy Map and As is Scenario.

- **09:00–09:15: Introduction**
  - Summary of previous workshop session activities and learning – understanding and generating empathy for end users, including creation of an End-User Persona(s), Empathy Map(s) and As is Scenario(s).
  - Recap of prerequisite activities – we provide our students with an online mini lecture on Creativity Techniques. In class, we ask multiple choice questions on the topic to verify learning – assessing learning by viewing answers in an app (or via a show of hands).
  - Reminder of where we are in the overall innovation management process – we're in the Idea Generation phase.
  - Outline of objectives of the idea generation workshop – generate and prioritise new ideas and select and articulate a prioritised idea to progress to the next stage of the project.
  - Walkthrough of workshop agenda – sign-posting each step we plan to work through.
  - Opportunity for attendees to ask questions.
  - At the end of the allocated time, the activity is brought to a close.
- **09:15–09:35: Activity 1 – Review of existing knowledge (converge)**

- o The teams are assigned 20 minutes to remind themselves, discuss and summarise key points from what they've already learned.
- o The attendees are recommended to focus on their assigned challenge, the output of their research into the challenge, including interview(s) with an industry expert (if applicable) and output of previous Design Thinking and related activities to understand and generate empathy for end users.
- o During this activity, the teaching/facilitation team walk the room, verify progress and answer questions.

- **09:35–09:50: Activity 2 – Idea generation – using the Big Ideas technique (diverge)**
  - o Introduction of the Big Ideas technique – highlighting the diverge nature of the activity, stressing the need to consider existing knowledge and encouraging generation of diverse idea, including creative 'wild card' ideas – 'it might not be possible, but wouldn't it be great if we could…' and so on.
  - o Direct teams to begin using the technique and highlight the time available.
    - ▪ Attendees diverge to generate ideas, write these on sticky notes and post the sticky notes onto the Big Ideas chart.
  - o During this activity, the teaching/facilitation team walk the room, verify progress, answer questions and intervene to prevent discussion of ideas between team members, politely reminding any talkative attendees that this is a diverge activity.
  - o If facilitating a single team, the facilitator may prompt the team to consider any potential obvious gaps in ideas which they have not yet been considered.
  - o At the end of the allocated time, the activity is brought to a close.

- **09:50–10:00: Break**
  - o A short break is included here to enable attendees to recharge their batteries. We stress attendees must return on time.

- o Attendees are also encouraged to add any additional ideas which come to mind during the break to the Big Ideas chart.

- o If facilitating a single team, or a small number of teams, the facilitator may use the break to review the ideas generated and move some of the ideas around the Big Ideas chart, for example, to group similar ideas together, to save time in the next activity.

- **10:00–10:40: Activity 3 – Idea prioritisation – using the Prioritisation Grid technique (converge)**

  - o Introduction of the Prioritisation Grid technique – stressing the converge nature of the activity, the need to collaborate and communicate effectively and need to complete the exercise in the allocated time.

  - o Direct teams to begin using the technique and highlight the time available.

    - ▪ Attendees converge to review the ideas for value and feasibility and place them onto the appropriate position on the Prioritisation Grid.

  - o During this activity, the teaching/facilitation team walk the room, verify progress, answer questions and intervene to assist converge discussions where necessary.

    - ▪ Experience shows some teams carry out this activity very quickly, while others deliberate over every idea in minute detail. Facilitation activities often include directing teams not to spend too little or too much time on each individual idea, to ensure they complete the activity to an appropriate level and on time.

  - o If facilitating a single team, the facilitator may more directly facilitate, including leading the movement of items from the Big Ideas chart and appropriate placement, based upon team discussions, onto the Prioritisation Grid.

  - o At the end of the allocated time, the activity is brought to a close.

- **10:40–10:50: Activity 4 – Idea selection and description (converge)**

- o Introduction of the activity – team selection of a prioritised idea, or group of linked ideas, to carry forward into the next session and creation of a short, written description of the idea.
- o Direct teams to begin using the technique and highlight the time available.
  - ▪ Attendees converge to select a prioritised idea, or a group of linked ideas, and write down a short description. Typically, the selected idea(s) will be from the top right-hand quadrant of the Prioritisation Grid.
- o During this activity, the teaching/facilitation team walk the room, verify progress, answer questions and intervene to assist converged discussions where necessary.
- o If facilitating a single team, the facilitator may act as a scribe, documenting the team's description of the idea.
- o At the end of the allocated time, the activity is brought to a close.

- **10:50–11:00 – Playback, summary and close**
  - o Playback of session objectives and discussion on progress.
  - o Confirmation of follow-on activities and actions – posting of the idea description onto a specified online workspace, team review and further research into the selected idea in preparation for the next session.
  - o Walkthrough of the next session's activities, including the objectives of the planned workshop activities, and a summary of any prerequisite work required.
  - o Opportunity for attendees to ask questions.
  - o Instructions on clearing of room, if appropriate, and handling and management of workshop materials.
    - ▪ For example, we have a standard message and a final slide with instructions and a reminder to all students to bring used and spare materials to the spares table when leaving the room. This keeps room clearance work to a minimum.

Key Hints and Tips

For facilitators

- Preparation, preparation, preparation – the better you prepare for and plan the workshop, the better the outcome is likely to be.

- Generate empathy for the attendees – put yourselves in their shoes – if you were one of the attendees, what support and guidance would you like to receive from a facilitator?

- Read the room – to understand what's going well and what might not be. Is there something in the workshop or in your own approach which needs to be tweaked or changed? If in doubt, ask open questions to the group and/or individual teams or attendees and actively listen to the answers.

- Ensure divergence and convergence requests are adhered to – conversation between team members should be kept to a minimum (or better still, zero!) during diverge techniques and actively encouraged during converge techniques. As the facilitator, it's part of your role to ensure this happens.

- Consider how to best motivate individuals and teams – be a constructive but positive friend when reviewing progress and offering advice.

- Spend time with each team to understand any team-based and/or individual attendee issues – as you know, not everyone learns and works the same, but all team members should be contributing. Obvious or potential team dynamic issues should be reviewed and, if necessary, addressed to ensure each team achieves the best outcome they can. This is significantly easier to do when facilitating one team, but even when you're supporting a number of teams, you can have a significant positive influence on their work.

- Watch the clock – if you have a fixed end time, it's important that all steps are completed by the end of the session and sufficient time is included at the end for playback and close. However, it's also sometimes good to be flexible, in order to

achieve the best results. This is significantly easier to do when facilitating a single team.

- Follow up on any agreed next steps and actions.

For workshop attendees

- Preparation, preparation, preparation – if you've been asked to complete any actions before the workshop, ensure these are done, so that both you and your teammates can get the most from the workshop.

- Generate empathy for the facilitator – put yourselves in their shoes – if you were the facilitator, what would you want the attendees to do?

- Generate empathy for your teammates – we know the phrase 'there's no "I" in "team"' is a bit of an old cliché, but as a member of the team, you should have a good view of what your teammates might expect from others, including yourself. Ask yourself if your own actions and behaviours are living up to this.

- There are no bad ideas or inputs – be a constructive but positive friend when reviewing your teammates' inputs.

- Ensure divergence and convergence requests are adhered to – be quiet and generate your own inputs in diverge activities and actively and positively contribute when the team is converging.

- Watch the clock – if you have a fixed ending time, it's important each step and all activities are completed on time.

- Follow up on any agreed next steps and actions.