

Summer & Fall 2014

Ideation Toolkit



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Alameda County Public Health Dept.
Summer & Fall 2014

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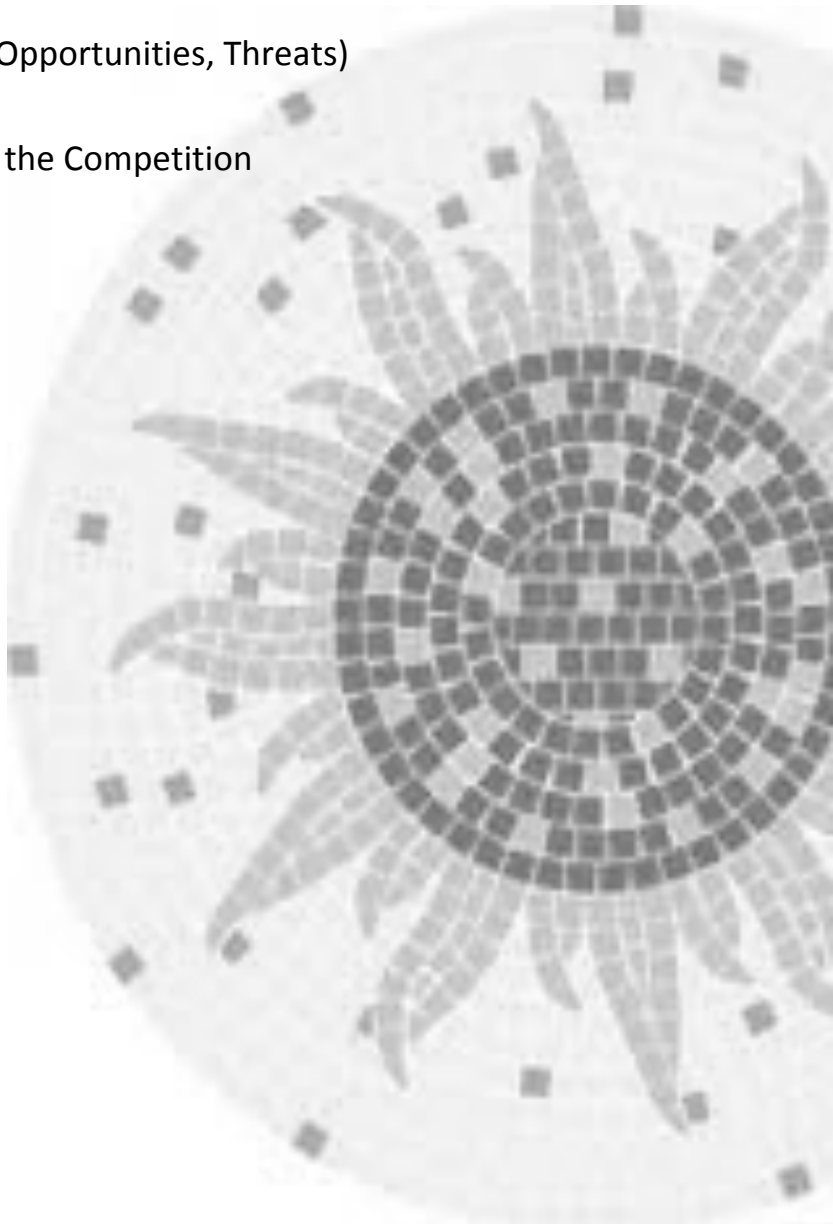
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I. Where We Are Now

At this point you have all completed the Understanding Phase for your Big Win Projects and have identified your group's real "How Might We" question! You will now be shifting from identifying issues, needs and priorities (Understanding Phase) into exploring solutions or opportunities for change (Ideation Phase).

(Cheat Sheet Created by Gobee Group)

Design Thinking Cheat Sheet



UNDERSTAND

Shadowing: Follow people to understand what they do

Data dive: Find and explore quantitative data to create insights

Behavioral mapping: Track movements over time and space

Secondary research: Use the Internet, go beyond journal articles

Contextual interviews: Ask people what they do, as they do it

IDEATE

Analogous models: Look to other industries for similar problems

Sticky brainstorming: Each team member generates ideas on sticky notes

Dot voting: Prioritize ideas by having your team vote on ideas with "dots"

Bottom-up clustering: Organize ideas into categories, to create more ideas

Study the competition: See how others tackle the same problem

EXPERIMENT

Drawing: Sketch out your solution on paper

Scenarios: Describe how your solution works to interviewees

Roleplaying: Assume the role of your users with your team

Prototype: Build an inexpensive mockup of your solution

Do it yourself: If feasible, try out your solution on your own

Health Equity by Design

Alameda County Public Health Department & Gobee



II. Background

Ideation is essentially “structured brainstorming” and can be a powerful tool for innovation. Ideation is most effective when it follows the Understanding Phase. This is because the insights gained from the Understanding Phase can be incorporated into appropriate ideas during the Ideation Phase. Truly understanding an issue can lead to the most innovative and realistic solutions. The goal of the Ideation Phase is to come up with as many ideas for solutions as possible and then narrowing down these ideas. The narrowing down process is done by grouping and sorting. The ideas for solutions that you all come up with will drive your team into the Experimentation Phase. The Ideation Phase is meant to highlight opportunities for change.

The Ideation Phase contains two steps shown below that consists of generating and evaluating ideas.



2 Steps of the Ideation Phase:

1. Turn the insights gained from the Understanding Phase and your own experiences and creativity into a number of ideas for projects. The purpose of this step is to come up with as many solutions and opportunities for change as possible.
2. Narrow the number of ideas you have generated to a small number (ideally 2-3) that you want to take back out and test during the Experimentation Phase.



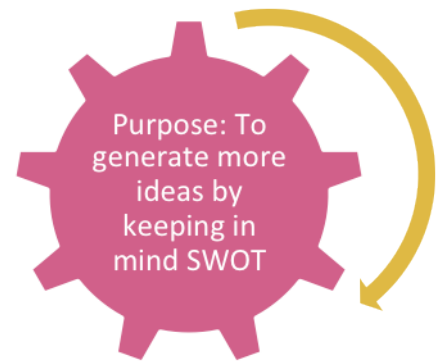
Ground Rules for Ideation

- Defer judgment (the first step is about letting ideas flow)
- Quantity (try to think of as many ideas as you can)
- Get radical (think outside of the box during step 1)
- Build (feel free to expand on ideas)
- Stay focused
- Be visual
- One at a time (if you are stating your ideas out loud)
- Go fast

Notes to self:

- Make sure your ideas are addressing the challenges in your **How Might We** question.
- This is a **toolkit, not a guide** (the only guidelines are the 2 Steps outlined on page 4 and the Ground Rules mentioned above)
- Since this is a toolkit, remember to feel free to **adapt the tools** included to best help you with your project, you can use as many tools as possible and there is no order to the tools (you can skip around within each Step).
- Do what **makes the most sense for your group** and topic area!

IV. Descriptions of Tools for each Stage



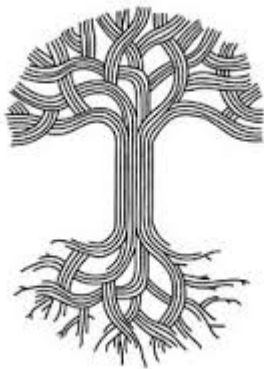
Ideation Tools for Step 1

a) SWOT (Strengths, Weaknesses, Opportunities & Threats)

(Adapted from the *Problem Finding Problem Solving* Fall 2011 Handbook from the University of California Berkeley Haas School of Business with permission)

Description:

- **Post a flip chart paper** divided into 4 quadrants with one of the letters S, W, O, T written in each quadrant OR post 4 different flip chart papers, each with one of the 4 letters on it.
- **Introduce the topic** you will be discussing: How to use the insight from the Understanding Phase to generate ideas for solutions.
- **Brief explanation of the SWOT process:** Discuss the strengths, weaknesses, opportunities, and threats of the **topic area your group is focusing on**. Talk through each of these categories separately and at the end **generate ideas** based on SWOT.



- **Start with Strengths.** Strengths refer to internal strengths in the existing organization/program/situation/neighborhood/topic area. These are things that are within your control. Brainstorm and write down your ideas on the S paper. Potential questions to ask for this activity include:
 - What strengths in the neighborhood have you learned about with this topic area?
 - What is already working well to address this topic area in the neighborhood?
 - What about this topic area would make it easy to address?

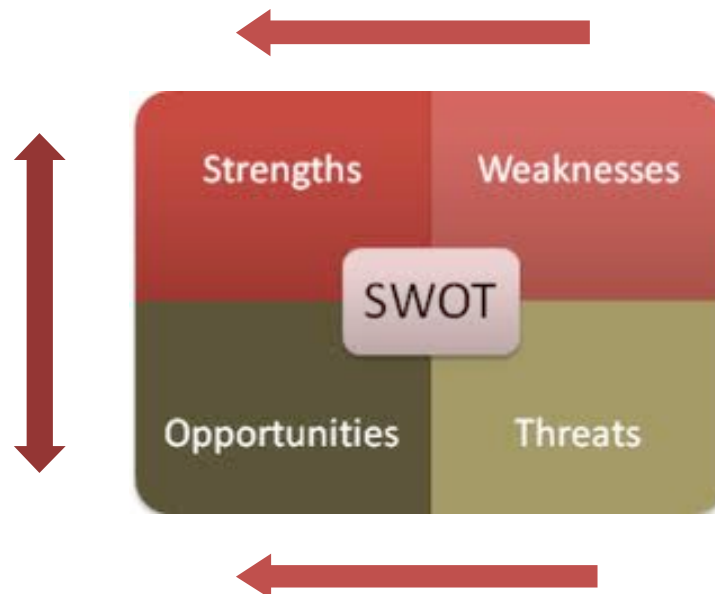
- **Weaknesses:** Weaknesses refer to internal weaknesses in the existing organization/program/situation/neighborhood/topic area. Brainstorm and write down your ideas on the W paper. Potential questions to ask for this activity include:
 - What challenges exist in the neighborhood for addressing this topic area?
 - What has NOT worked already to address this topic area in the neighborhood?
 - What about this topic area would make it difficult to address?

- **Opportunities:** Opportunities refer to external opportunities in the environment. For example, changes in the political, social or economic climates that might support some kind of new program or support some kind of change. What are the larger social/political/economic trends that might support innovation or improvement? For example, is there an external “champion” you might identify, a new funding opportunity, a (negative) change coming for competitors that might strengthen your topic area? Brainstorm and write down your ideas on the O paper. Potential questions to ask for this activity include:
 - What structures exist that could support you addressing this topic area within the neighborhood?
 - What about within East Oakland or the SF Bay Area?
 - Are there powerful people (legislators, innovators, etc.) who support your topic area?
 - What social/economic/political trends might inspire/support your topic area?

- **Threats:** Threats refer to external threats in the environment. For example, potentially negative changes in the political, social or economic climates that might negatively impact the existing organization/program/situation/topic area or make it hard to innovate or change. What are the larger social/political/economic trends that might create negative impact? For example, are there potential funding cuts, new competitors, changes in technology, etc. that might weaken your topic area? Brainstorm and write down your

ideas on the T paper. Potential questions to ask for this activity include:

- What bad things are happening in the Castlemont neighborhood that might make it more difficult to address your topic area?
 - What about within East Oakland or the SF Bay Area?
 - What structures might BLOCK your ability to address this topic area?
 - What social/economic/political trends might make it hard for you to carry out a project in your topic area?
- **Step back and look at the entire SWOT analysis.** Consider ways that elements in each of the sections connect to elements in other sections. Are there any clear themes? Any things that are more important than other things? One strategy in using a SWOT analysis as a planning tool is to identify strategies/program changes that will *transform weaknesses into strengths, transform threats into opportunities, and/or to align strengths and opportunities.*



Potential questions to ask:

- How can we build on existing strengths?
- How can we address or minimize existing weaknesses?
- How can we use our strengths to respond to a new opportunity?
- How can we use our strengths to minimize an upcoming threat?

- **Prioritize.** Look at the whole SWOT analysis as you begin to generate ideas. Generate ideas keeping the strengths, weaknesses, opportunities and threats within your topic area in mind.

b) From Motivation to Solution

Description:

- **Identify Motivation:** the Needs, Fears and Beliefs that support the problem
 - Take a sheet of paper (flip chart paper) and write on top **which situation or practice you want to affect**. For example, if your issue is around having too many liquor stores and not enough grocery stores, this exercise is meant to get you thinking about **what motivates** the existing liquor stores in the Castlemont neighborhood.
 - Draw a line in the middle. Write the header for each column: MOTIVATIONS on one side, SOLUTIONS on the other.
 - **Explain that the situation or practice you want to change exists for a reason:** it serves a purpose, however twistedly. It is driven by a number of needs, fears, ideas and habits. Your goal is to **uncover these needs, fears, ideas and habits that support the issue you want to address**. By doing this, you can brainstorm ideas which address deeper aspects of the challenge.
 - First, you may want to conduct a **brainstorm** about what needs the practice may be serving. What are the needs that support existing liquor stores? Why are there liquor stores? Don't be too concerned at this point about validating or organizing your thoughts. Later, you may look at your list again, and see if you need to go deeper. Fears, especially, may be hiding other unrecognized needs.
 - Categorize what you have listed as a **NEED**, a **FEAR**, a **BELIEF**, or a **CUSTOM/NORM**, based on your experience and what you learned in the Understanding phase.

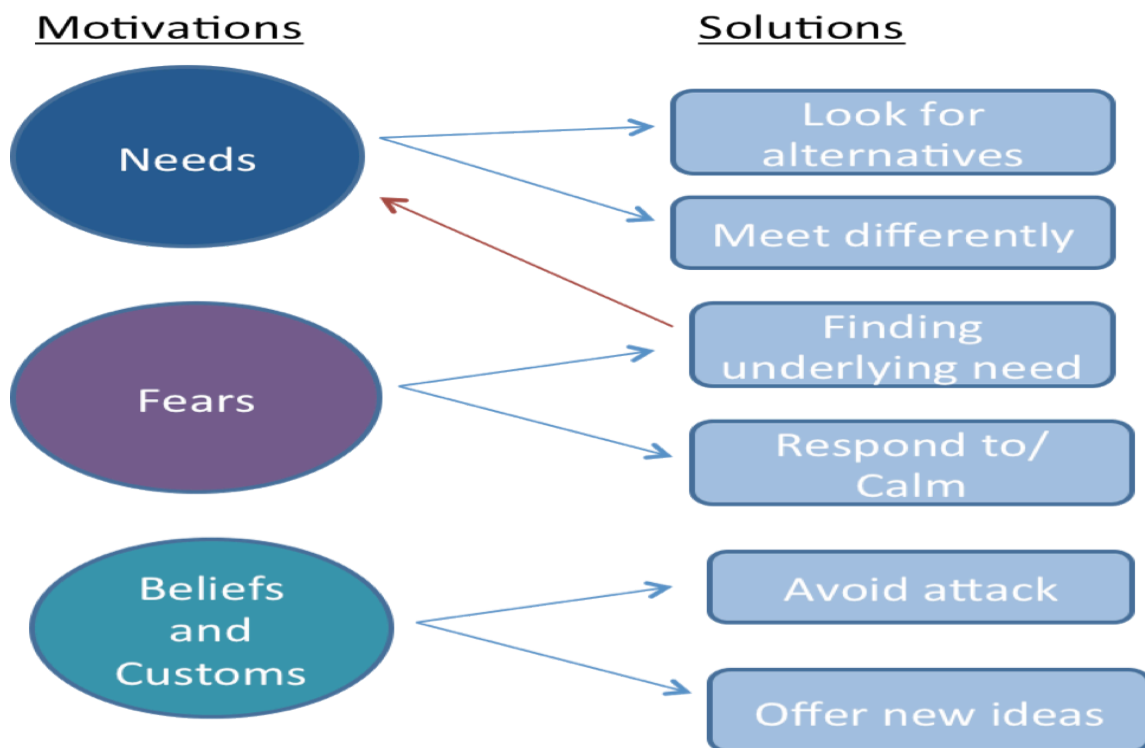
Purpose: Identify the motivations that support an issue in order to properly come up with effective solutions to address the issue

- ✓ **Needs:** something necessary for survival. In the example mentioned previously, a need would be something that is necessary in the Castlemont neighborhood that is being met by the liquor store. For example, there is a need for food nearby in the neighborhood.
- ✓ **Fears:** an unpleasant emotion caused by the belief that someone or something is dangerous, likely to cause pain, or a threat. A fear related to the example of liquor stores versus grocery stores could be that Castlemont residents are fearful that food products will not be affordable. The liquor stores address this issue by selling cheap, affordable foods such as chips, candy, soda, etc. Another fear could be that vendors are fearful that residents will not purchase healthier foods.
- ✓ **Beliefs and Customs:** trust, faith, or confidence in someone or something (**BELIEF**). A habitual practice; the usual way of acting in given circumstances that is usually transmitted from generation to generation (**CUSTOM**). An example of a belief or custom driving the large numbers of liquor stores in the Castlemont neighborhood could be that residents are used to the food sold at these locations or maybe believe that other foods would not be affordable.
 - After the brainstorm, you can organize your list if you want, trim it down, group items together, etc. At the end, you will have a list of the motivations that drive your topic area.
- **Find alternatives, arguments and tactics**
 - Now go over the list on the left. Look for alternatives, arguments and tactics you could use to **address each motivation**. Write these down under SOLUTIONS.
 - For each major **NEED**, look for alternatives, for other ways these could be met through better, more positive means. Offering replacement practices will make for easier and more durable solutions than trying to suppress the need.
 - When dealing with **FEAR**, acknowledge needs such as for safety and protection. Assuage those fears with new reassurance mechanisms.

Bring in real-life experiences if you can (testimonies are great for that).

- When dealing with **CUSTOMS**, suggest change is possible. The recognition that customs do change over time may be the hardest part. This creates the opening you need to even suggest a specific change.
- When dealing with other supporting **BELIEFS or IDEAS**, come up with powerful arguments that could be used to bring respectful challenge. Your goal with these arguments is not to defeat and humiliate. Your goal is to change the outlook and make everybody win.

Summary of “From Motivation to Solution” Tool



b) Analogous Brainstorming/Study the Competition

Description: If you know of another organization or group of individuals working on a similar or the same issue, look into what they are doing to address it. If possible, ask questions to understand why they chose to focus on the issue and how they are addressing it. You might find that you do not have to re-invent the wheel if there are other individuals already working on similar things. This could be an opportunity to collaborate (See Cross Sector Collaboration below). Some starting steps are:

Purpose: Look at what other individuals are already doing to address a similar or the same issue.

- The first step might be to contact an individual who is involved in the group or organization and arrange a meeting
- Share what your goals are and listen to what their goals and visions are
- Make note of what has worked and what has been challenging about these approaches
- You may also search online to identify other models or solutions to your topic area. Similarly, make note of what has worked and what has been challenging about these approaches.
- Finally, you may talk with neighbors, friends, or residents about solutions THEY have seen relating to your topic area, and get a sense from them what they think has worked and has not worked.

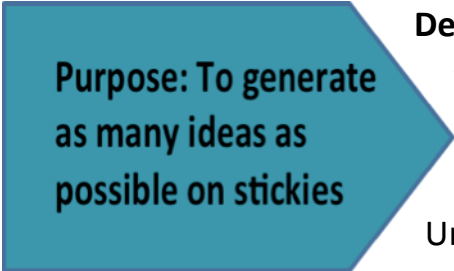
Cross Sector Collaboration: This means collaborating with others that are working in different fields to address a common issue.

- For example, law enforcement and criminal justice cannot address violence on their own (especially because of the racial politics that unjustly influence these areas in this country). This is an effort that must be taken on collaboratively.
- This means talking to organizations doing public health work, organizations that provide employment opportunities to community members, organizations working on housing rights, and



any other community-based organizations working to improve the wellness of the community. This collaboration may spark more innovation and new insight on how to address an issue. This is a good strategy to approach something with fresh eyes.

c) Sticky Brainstorm



Purpose: To generate as many ideas as possible on stickies

Description: With the HMW questions in mind, try to think of as many ideas for solutions as possible. Your ideas should address the HMW question you landed on and should also reflect findings from the Understanding Phase.

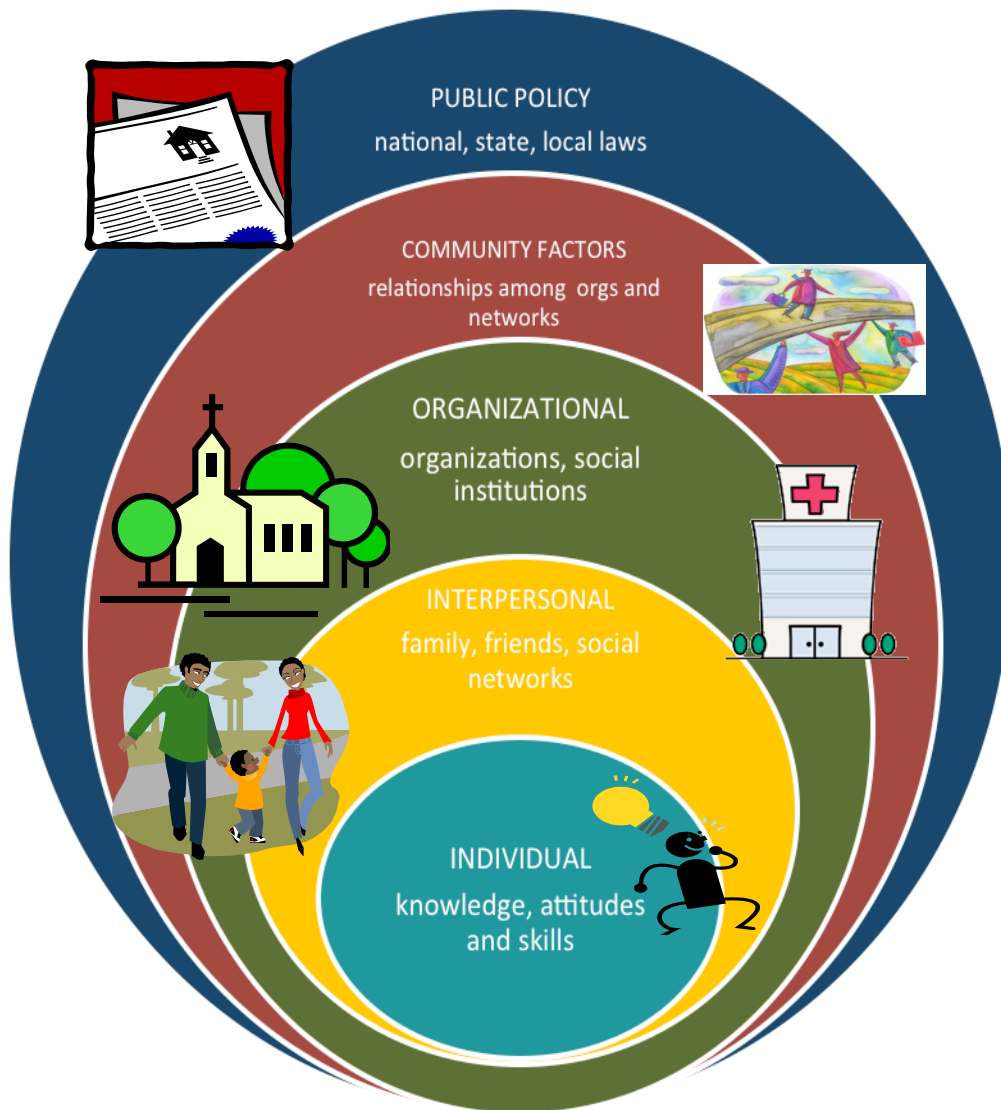
- For example, let's pretend that during the Understanding Phase your group decided to use the photovoice tool with all your neighbors. Then, when you connected back with all your neighbors, they shared that they only took pictures of positive things going on in the neighborhood for a reason. They expressed that they are tired of seeing and hearing only about the negative things going on in East Oakland. Based on this feedback, you might want to make sure your ideas for solutions do not focus on negative things. This way, you are incorporating what you learned in the Understanding Phase into the Ideation Phase and making sure that other community members' voices are heard. This is just an example. Make sure to use whatever YOUR group learned from the Understanding Phase.

❖ Social-Ecological Model

Description: When brainstorming, keep in mind how you want to address an issue. You can target an issue at various levels. Your ideas may look different depending on how you want to effect change. Below is a brief description of the different levels and a visual representation.

- **Individual:** these types of projects would target knowledge, attitudes, and skills
- **Interpersonal:** these types of projects would target family, friends, and social networks
- **Organizational:** these types of projects would target organizations and social institutions
- **Community Factors:** these types of projects would target relationships among organizations and networks
- **Public Policy:** these types of projects would target national, state and local laws

Social-Ecological Model Example:



d) Bottom up Clustering

Purpose: To organize ideas into categories, to create more ideas

Description: If you have already brainstormed ideas for solutions through one of the three tools mentioned above and you feel like you are all out of ideas, this is a way to spark more solutions.

- 1) **Group ideas:** Organize the ideas into categories. Group the ideas by common themes. Doing this can help you view the ideas in a different way and this can stimulate even more.
 - 2) **Go beyond:** Once you have categories for all of your ideas, try to think of more ideas that are similar to the existing ones. Brainstorm 5 new ideas that would fall under each category.
 - 3) **Build:** Pick an idea that is posted and think of 5 new ideas that build on that idea
 - 4) **Talk to a buddy:** Exchange your ideas with a partner so that they can build on your ideas and you can build on theirs.

Ideation Tools for Step 2

a) SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

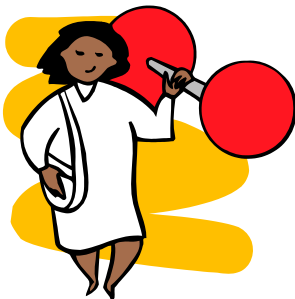
(Adapted from the *Problem Finding Problem Solving* Fall 2011 Handbook from the University of California Berkeley Haas School of Business with permission)

Purpose

To analyze the strengths and weaknesses of an idea as well as the opportunities and threats to narrow down the number of strong ideas with opportunities

Description: This tool is meant to use after you have narrowed down your ideas to about 2-3 that you wish to reflect on further. Doing this for more than 3 ideas would require too much time.

- **Post a flip chart paper** divided into 4 quadrants with one of the letters S, W, O, T written in each quadrant OR post 4 different flip chart papers, each with one of the 4 letters on it.
- **Introduce the topic** you will be discussing: How to use the insight from the Understanding Phase and SWOT to narrow the number of ideas for solutions.
- **Brief explanation of the SWOT process:** Discuss the strengths, weaknesses, opportunities, and threats of the ideas you are evaluating. Talk through each of these categories separately and at the end prioritize some ideas to focus on in order to narrow down the number of ideas.



and write down your ideas on the S paper. Potential questions to ask for this activity include:

- i. What do you like about this idea?
- ii. What would be the easiest part of carrying out this idea?

- iii. Would there be support for this idea?
- iv. What do you think the community thinks is good idea?
- v. If you compared this idea to other ideas, in what ways is it better?
- vi. What do you see as the most important strengths of this idea?

- **Weaknesses:** Weaknesses refer to internal weaknesses in the existing organization/program/situation/neighborhood/ideas. Brainstorm and write down your ideas on the W paper. Potential questions to ask for this activity include:

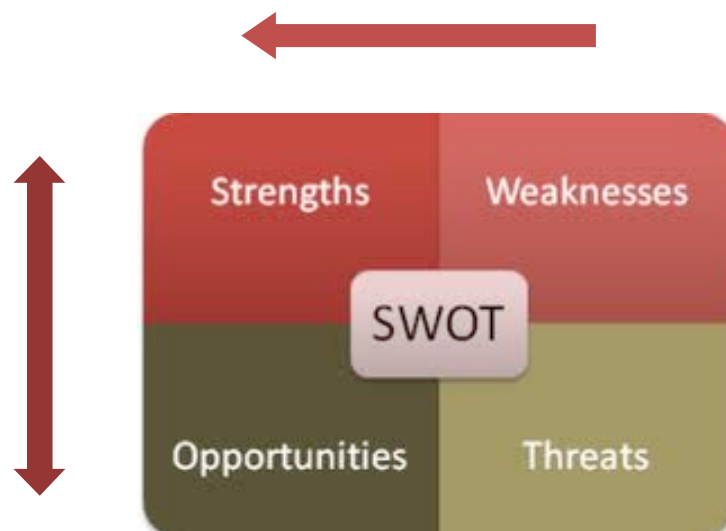
- i. What do you not like about this idea?
- ii. What would be the hardest part of carrying out this idea?
- iii. Would there be a lack of support for this idea?
- iv. If you compared this idea to other ideas, in what ways is it less good?
- v. What do you see as the biggest weaknesses of this idea?

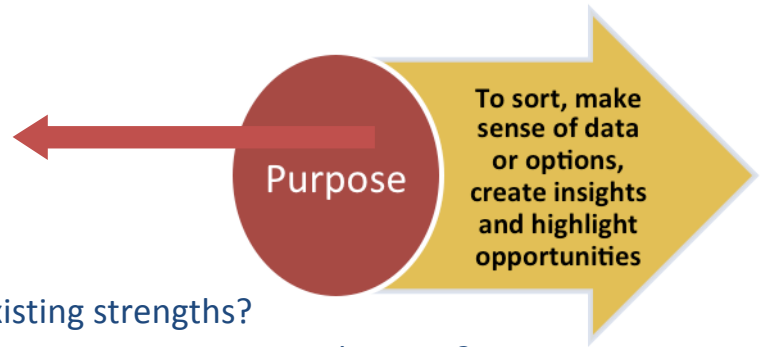
- **Opportunities:** Opportunities refer to external opportunities in the environment. For example, changes in the political, social or economic climates that might support some kind of new program or support some kind of change. What are the larger social/political/economic trends that might support innovation or improvement? For example, is there an external “champion” you might identify, a new funding opportunity, a (negative) change coming for competitors that might strengthen your idea? Brainstorm and write down your ideas on the O paper. Potential questions to ask for this activity include:

- vi. What good things are happening related to your topic that might impact your idea?
- vii. What about within East Oakland or the SF Bay Area?
- viii. Are there powerful people (legislators, innovators, etc.) who support your idea?
- ix. What social/economic/political trends might inspire/support your idea?

- **Threats:** Threats refer to external threats in the environment. For example, potentially negative changes in the political, social or economic climates that might negatively impact the existing organization/program/situation/ideas or make it hard to innovate or change. What are the larger social/political/economic trends that might create negative impact? For example, are there potential funding cuts, new competitors, changes in technology, etc. that might weaken your idea? Brainstorm and write down your ideas on the T paper. Potential questions to ask for this activity include:
 - x. What bad things are happening in your topic area that might impact your idea?
 - xi. What about within East Oakland or the SF Bay Area?
 - xii. What social/economic/political trends might make it hard for you to carry out your idea?

- **Step back and look at the entire SWOT analysis.** Consider ways that elements in each of the sections connect to elements in other sections. Are there any clear themes? Any things that are more important than other things? One strategy in using a SWOT analysis as a planning tool is to identify strategies/program changes that will *transform weaknesses into strengths, transform threats into opportunities, and/or to align strengths and opportunities.*





Potential questions to ask:

- How can we build on existing strengths?
 - How can we address or minimize existing weaknesses?
 - How can we use our strengths to respond to a new opportunity?
 - How can we use our strengths to minimize an upcoming threat?
- **Prioritize.** Narrow down the number of ideas keeping the strengths, weaknesses, opportunities and threats within the Castlemont neighborhood in mind.

2x2 Matrix

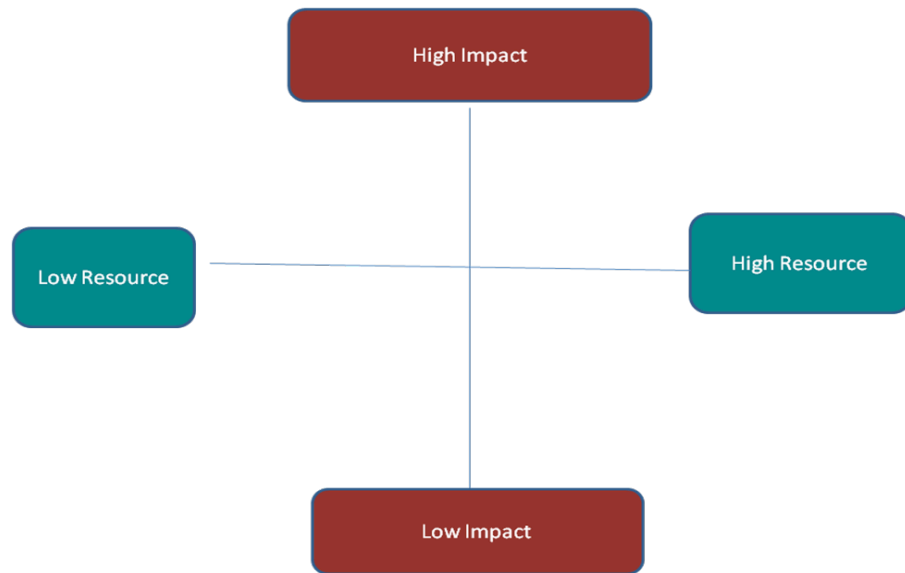
Description:

- Create a 2X2 matrix on an easel sheet or butcher paper by drawing a vertical and a horizontal line on the paper
- Decide on two dimensions or criteria that are relevant to sort out the data or options. For example, the two criteria can be “Impact x Resources,” “Impact x Opportunities,” “Impact x Cost,” “Impact x Time,” or etc.

Notes:

- ✚ You may ideate on a list of dimensions then select two that the team believes are most relevant
- ✚ Or just select two that are core to your challenge
- Define two opposites on the first dimension and write them down on the left and the right of the horizontal axis (e.g., “cook from scratch” vs. “never cook”, “own a home” vs. “rent a home”, “beach lover” vs. “mountain lover”, “cheap” vs.” expensive”)
- Define the opposites of the second dimension, and write them down on the top and bottom of the vertical axis
- Write your ideas on post-its and place them on the matrix. Compare and contrast, moving them as needed, **making sure that their placement on the matrix corresponds appropriately to both axes.**
- Draw conclusions on the data or select options based on your objectives and the respective positions of the options

✚ If necessary, redo the exercise with two other dimensions or criteria
Example:



b) Mind Mapping

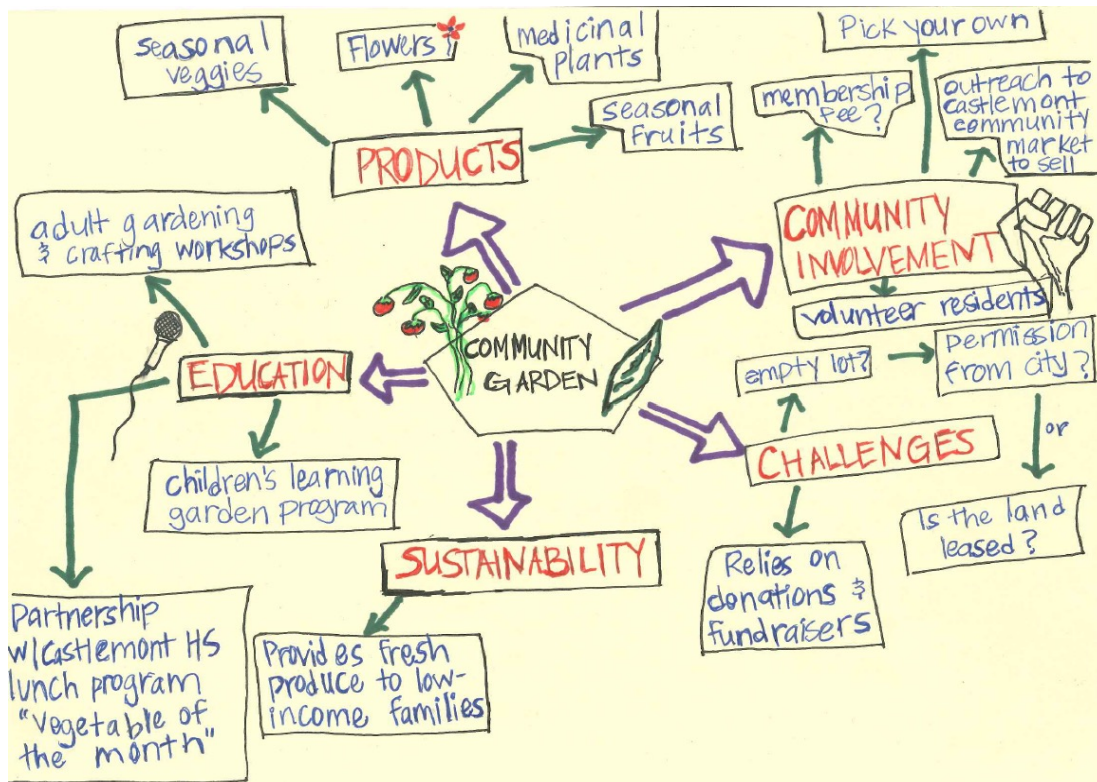
(Adapted from the *Problem Finding Problem Solving* Fall 2011 Handbook from the University of California Berkeley Haas School of Business with permission)

Description:

- Start in the center with a description of the idea
- Write whatever comes to mind next as a “sub-topic” and draw a connecting line, do it again, and again....
- Use images and symbols as much as possible
- Select key words and print clearly
- Each word/image should sit on its own line or inside its own bubble
- The lines should be connected, starting from the central image.
Important connections between concepts in different sub-section should be indicated
- Use colors to code for key ideas or sub-systems (sections of the map)
- Use thinker lines to indicate more important connections
- Put the most important ideas near the center (it’s a hierarchy of ideas)
- Do it your own way!

Purpose: To visualize and structure ideas as a way of organizing information and narrowing down an idea or topic

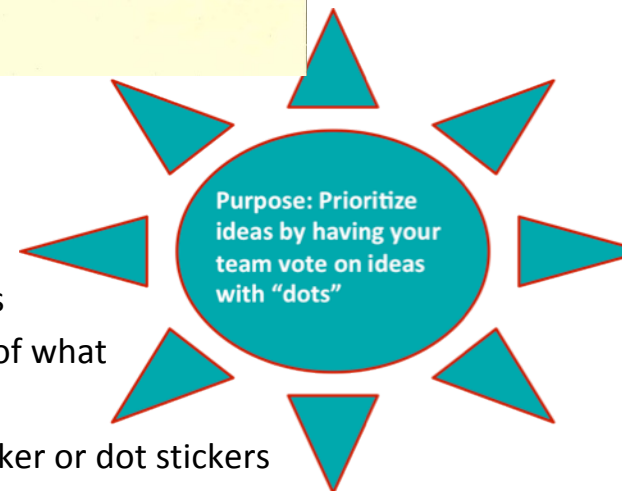
- See Mind Mapping example below



c) Dot Voting

Description:

- Lay out all of the options of ideas for solutions that were brainstormed in Step 1 (regardless of what tool your team used)
- Provide all team members with a colored marker or dot stickers
- Have each team member vote for their top choice to narrow down the number of ideas for solutions by either placing a sticker next to the idea or drawing a circle with their colored markers
- You can be creative with the different colored markers. For example, green can indicate your top choice, yellow your second and red your third. Another option is: green can indicate the most innovative idea, yellow the most realistic idea, and red the most impactful idea. Feel free to make different categories and as many as you like!




- However, if your goal for this tool is to narrow down to have a smaller group, you can provide each individual with less votes.
- But, if your goal is to have a bigger range of options for ideas, you can provide each individual with more votes.
- **Recall!** This tool, along with the others, is adaptable!
- Remember: You can use this tool immediately after completing Step 1, after using other tools below, or not at all if you decide this is not the best tool for you. These tools are adaptable and the toolkit has many tools so that you can pick and choose those that work for you the most.

d) Card Sort

Purpose: To compare and rank ideas to select a smaller number of them

Description:

- Write each idea option on a 3" x 5" card or post-it
- Count the number of options, let's pretend you have 15
- Identify the criteria for rating. Brainstorm a list of criteria and select a few. For example, most sustainable, most impactful, most innovative, most supported, etc.
- Select the least liked option and number it with the last number, in this case 15
- Select the most preferred option and number it 1
- Select the least liked option among those remaining and number it 15-1, so 14
- Go the most preferred option among those remaining and number it 2
- Continue alternating between least preferred and most preferred until all the options have been ranked

 *Tip: you can do this by rating the options individually first, and then having a group discussion about the rankings or you can do the rating as a group from the start, but this works best if there is a limited number of options*

and a small group within which to build agreement. This tool also works best when you have 6-15 options.

- If your group members complete this ranking system individually, do the following:
 - Create a matrix with individuals down the side and options across the top to capture the individual results
 - Calculate the total score for each item by summing the columns
 - Discuss the results paying particular attention to places where the individual rankings differed significantly
 - Adjust the rankings per the discussion to arrive at a final ranking

Example:

	Option 1	Option 2	Option 3	Option 4
Participant A	2	3	1	4
Participant B	1	3	2	4
Participant C	3	2	1	4
Participant D	4	2	3	1
Totals	10-#2	10-#2	7-#4	13-#1

e) Top Three Contenders

Description:

- When you have narrowed down your idea options to 3, create a table with 2 columns and 3 rows
- On the first column, write down the three ideas going down
- On the second column, explain how your idea is answering the HMW question



This is a good way of making sure that your top three ideas are still addressing the HMW question.

Purpose: To make sure your idea is addressing the HMW question

Example from the Quick Win with the HMW Question of: HMW address the challenged of city infrastructure as it affects problems of trash and dumping?

Ideas:	Answer to HMW Question:
<ul style="list-style-type: none"> • Education Campaign- Create informational papers/materials to engage community to properly recycle, use dump days/know/teach how to use existing resources 	<ul style="list-style-type: none"> • ...BY informing the community of existing city resources – “if you know better, you do better”
<ul style="list-style-type: none"> • Advocacy- Doing a campaign letter with people who live here and the city, also including solutions 	<ul style="list-style-type: none"> • ...BY advocating to the city to address some of their existing infrastructure issues
<ul style="list-style-type: none"> • Neighborhood-to-City Leaders- Connecting one person in the city with one person in the neighborhood to coordinate efforts to address the trash issues, including outreaching to churches and other community resources 	<ul style="list-style-type: none"> • ...BY streamlining the connection of the relationship between the city and the neighborhood around trash issues