

# WHAT'S NEXT *for* COMMUNITY PHILANTHROPY



## GENERATING NEW IDEAS: A design workshop

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# Overview

## Generating new ideas and the fallacy of the “Eureka!” moment

At the heart of the innovation process is the creation of new ideas. But people often romanticize the idea generation process by thinking of it as a “Eureka!” moment or as the lightning strike of creative genius. As journalist Steven Johnson put it in his 2011 book *Where Good Ideas Come From*, “Inventors, scientists, entrepreneurs, artists — they all like to tell the stories of their greatest breakthroughs as epiphanies, in part because there is a kind of narrative thrill that comes from that lightbulb moment of sudden clarity....”

But you don’t have to be a genius to come up with innovative ideas. And an organization can’t function by waiting and hoping for the lightning strike of innovation. The good news is that the last several decades of research and practice in the commercial sector have produced structured design processes for accelerating and systematizing innovation.

## This exercise is designed to help your organization think creatively about new ways to serve your community.

This document is intended to introduce community philanthropy organizations to a deliberate methodology for generating creative approaches to serve their communities. It is, at its heart, a brainstorming exercise. And while there are many ways to “do” brainstorming,<sup>1</sup> we have attempted to provide here a set of exercises that are tailored specifically to the work of community philanthropy organizations.

As such, we hope it provides you with the guidance and materials you need to run your own idea generation workshop. We hope that it enables you to create a safe space for discussing the challenges that your organization and community face and for developing creative solutions that can help you address these challenges in effective new ways.

## To start, a few core principles for the idea generation process

There are almost as many ways to run an idea generation session as there are ideas. But to help you along, it’s important to start with a handful of key principles:

 **Start with a design challenge.** Fight the urge to get people together to discuss a single, specific idea right off the bat. Fixating on just *one* idea can limit thinking and keep you from examining the problem you are trying to solve. Instead, work your way back to the *design challenge*: the “something” that you are working to fix or to think creatively about. The “right” design challenge is:

- Aligned with your mission and represents a growing need or emerging opportunity in your community;
- Broad enough to allow you to discover areas of unexpected value, but specific and concrete enough to be manageable (because it’s exceedingly difficult to generate new ideas about abstractions); and
- Framed in terms of a challenge or opportunity — not in terms of a new technology, organization, program, or service.

### Example of a potential design challenge:



<sup>1</sup> See, for example, the toolkits published by [IDEO](#) and by [Stanford University's d.school](#) for more on the brainstorming process.



**Get diverse people in the room.** Innovation often comes from the cross-fertilization of different perspectives, so be sure to include a wide range of diverse viewpoints in the conversation. In general, try to include people with different areas of expertise, levels of seniority, and unit affiliations (paying attention to power dynamics); genders, generations, and ethnicities; and personality types.

- If limiting participation to staff and board, include not only experts and decision makers but also internal connectors who are known for building bridges and **intrapreneurs** who are already experimenting with new approaches inside your organization.
- If opening participation to outsiders, include experts with relevant areas of expertise, early adopters of new technologies from inside or outside your organization, and advocates representing relevant constituents.<sup>2</sup>



**Vary the types of exercises you use.** Encourage very different types of thinking by asking people to work quietly and out loud; having them identify existing practices, recombine ideas, and come up with entirely new thoughts; imposing and then removing constraints; and using visual, auditory, and kinesthetic cues (although not all at the same time). It also helps to move relatively quickly, not dwelling on any one exercise or idea for too long. This is likely to push participants out of their comfort zone — out of their traditional way of thinking — while increasing the likelihood that the idea generation process as a *whole* will “click” for any given participant. It also increases the likelihood that the process will yield a larger volume of ideas — which is the *raison d’être* for this exercise.



**Be clear about the rules.** Idea generation, by definition, is about surfacing as many ideas as possible — and that means that there really are no bad ideas, at least initially. Standard rules include deferring judgment, encouraging wild ideas, staying focused, being visual, and going for quantity, among other things (refer to Appendix A for ideation rules).



**Capture what people say.** Great ideas often slip through the cracks or can be lost if you don’t do a good deal of capturing thoughts and ideas as they emerge. Err on the side of writing down too much.

### **Moving from lots of ideas to a handful of concepts worth testing**

The idea generation process will leave you with a template or white board full of ideas of all shapes and sizes. The hard next step is turning those ideas into several concepts to prototype and test. This step — where diverse perspectives build on one another, where half-hunches get mashed together into new ideas, where you dive into a crazy idea to find the kernel of something doable and profound, or where some small idea leads you to another, bigger, more interesting one — is still much more art than science.

It often requires skilled facilitation to help pull out the seeds of a promising concept and to pull together common themes from disparate idea generation exercises. Whatever you do, remember to choose a number of concepts to prototype and try (because many of them are likely to fail), and remember to cross-check your concepts against your original design challenge. And ideally, by the end of an idea generation workshop, you’ll emerge with a set of new ideas for doing your work in new ways that you can try and test for moving forward.

This document is part of the *What’s Next for Community Philanthropy* toolkit, which was published by Monitor Institute in June 2014 with support from the Council on Foundations, the Charles Stewart Mott Foundation, the W.K. Kellogg Foundation, and Community Foundations of Canada, along with more than 15 North American community foundations.

The *What’s Next* toolkit aims to help community philanthropy organizations apply innovation and design methodologies to think creatively about their business models and the broader future of the field. The research for this toolkit involved nearly 200 interviews with leaders of community foundations and other community philanthropy organizations, as well as more than a dozen interactive workshops and user feedback sessions.

Visit [monitorinstitute.com/communityphilanthropy](http://monitorinstitute.com/communityphilanthropy) to learn more about the *What’s Next* toolkit and research methods.

<sup>2</sup> For more on how to engage multiple perspectives, refer to a chapter by the same name in Chris Ertel and Lisa Kay Solomon’s book *Moments of Impact* (2014).

# Objectives

This design workshop is meant to help community philanthropy organizations — their staff, senior leadership, and/or board — do two things:

- Generate new ideas to help address an unmet community need
- Build internal organizational capacity to “do” innovation

## Materials and setup

We recommend doing this exercise in a small group(s) of five or six people.

### What you’ll need

- A copy of the instructions per small group (pages 4–6)
- A copy of the ideation rules *per small group* (Appendix A)
- A copy of the ideation template *per small group* (Appendix B)
- Two sets of free association pictures *per small group* (Appendix C)
- A large flip chart and markers *per small group*
- One notepad, one 3” x 5” sticky note pack, and one dark sharpie *per person*
- A space that’s *not* your usual meeting place, where participants will be able to think creatively together
- Music playlist and speakers to help you control the ideation process — and to make it fun
- 90–120 minutes of participants’ time and attention (with plenty of breaks and snacks in between)

### Pework you’ll need to have done

- Share the overview (pages 1–2) with participants ahead of time to establish a baseline understanding of the Generating New Ideas theory and process.
- Hone in on a clear design challenge — “the something” that you are working to fix or think creatively about — before you begin this exercise. The key to getting the “right” design challenge is to focus on a challenge that is aligned with your mission, represents a growing need in your community, and is specific and concrete (it’s exceedingly difficult to generate new ideas about abstractions). The design challenge may be inspired by:<sup>3</sup>
  - A role you want to play in your community — e.g., how to influence the people who make and vote on public policies;
  - A trend influencing your community — e.g., how to incentivize millennial donors to give; or
  - A specific issue in your community — e.g., how to better prepare students to meet a twenty-first-century workforce.

Everything that happens in the workshop will involve thinking creatively about the design challenge you’ve chosen.

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<sup>3</sup> For inspiration regarding your design challenge, refer to [Bright Spots: Promising approaches in community philanthropy](#) and [Shift Happens: Understanding how the world is changing](#), which feature roles in community philanthropy and trends influencing U.S.-based communities, respectively.

# Instructions

Generating New Ideas is a 90- to 120-minute workshop (depending on how many of the activities you choose to include) designed for up to six small groups of five or six people each. In addition to the prework highlighted above, the design includes six key parts:

- **Setting the stage** for what is to follow.
- Four different **ideation activities** to help the group surface ideas. While not all of these activities need to be included in a single workshop, we do recommend doing at least *two of the four activities* to ensure you generate a robust set of new ideas.
- A concluding exercise focused on sorting through the ideas that have been generated and **shaping concepts worth testing**.

## Setting the stage (5 minutes)

Explain to participants that they will be using structured brainstorming processes to generate lots of ideas for addressing a particular challenge facing your community. Over the course of the workshop, they will first walk through up to four very different activities intended to prompt new thinking and then will spend time sorting through the various ideas they surfaced to synthesize a few that may be worth testing or prototyping. During this introductory part of the workshop, you should also make sure that:

- Participants understand the ideation rules (Appendix A). Review them one by one, emphasizing the importance of keeping an open mind and suspending judgment.
- Participants understand the design challenge they will be working on. Every activity they go through will be centered on that design challenge. Have each small group work together to write the challenge down — in their own words — at the center of the ideation template (Appendix B).
- If you're working with two or more small groups, each small group has a skilled facilitator who will help you move the group, capture key insights on the template, and help the group identify cross-cutting themes.

## Activity 1: Examples from analogous spaces (20 minutes)

**Speaking notes for facilitators:** The best way to start innovating is to think about what's already out there. That is, to think about other community philanthropy organizations — inside and outside our community — that are effectively addressing the design challenge you have selected. And even more broadly, to think about organizations outside community philanthropy — private foundations, nonprofits, businesses, and government agencies — that are excelling at addressing this challenge.

Why? Because research shows that innovation doesn't always have to be completely original and brand new — it simply needs to be new to you and your organization. Indeed, many of the best new ideas come from taking existing ideas and adapting them (or elements of them) to fit a different circumstance and context. This activity aims to capture the wisdom of this crowd about the existing approaches for addressing our design challenge.

- Participants should take two minutes to brainstorm as many examples as they can of other organizations that are doing a good job meeting the design challenge and the specific practices that make those organizations successful. For example, if the design challenge is "encouraging more local residents to vote," a participant might write, "The Obama campaign used phone trees and leveraged networks of volunteers who contacted and encouraged their peers to get to the polls." On their notepads, participants should capture the names of these organizations and the practice that has made them so successful.
- At the two-minute mark, participants should pick their best example, write it on a single sticky note, and affix it in quadrant 1 (Appendix B). Cluster those sticky notes that convey similar ideas.
- Once participants have had a chance to select their best example, they each should share what they wrote on their sticky note with the rest of the small group, in 30 seconds or less.
- Once everyone has had a chance to describe their examples, the group should take five minutes to reflect on the ideas that were just presented. The facilitator should capture additional ideas that come up in the course of the conversation on sticky notes and add them to quadrant 1 on the template.
- With two minutes to spare, each small group should stop the discussion and circle the three or four most repeated or most interesting practices.

### Activity 2: Crazy ideas (20 minutes)

**Speaking notes for facilitators:** A classic way to prompt new thinking is to try to remove all constraints. We do this because people often feel hemmed in by existing limitations, rules, and structures. We do this by giving people the freedom to think about wild and crazy ideas, without concern for whether their ideas are practical or doable.

If we don't think about way-out-there ideas, we risk ending up with small, incremental improvements on what already exists. (There's nothing wrong with incremental improvement, but it's not necessarily our goal for today.) Indeed, many creative approaches emerge from crazy ideas that are scaled back to be more practical. The next activity is intended to give you the freedom to let your imaginations run free.

- Participants should take two minutes to brainstorm very crazy ideas *related to the design challenge*. The key here is to imagine that there are no constraints (e.g., legal, financial, geographical) of what you can do. Going back to our earlier example, if the design challenge is "encouraging more local residents to vote," a participant might write, "What if we paid people to cast their votes?"
- At the two-minute mark, participants should pick their best example, write it on a single sticky note, crumple it up, and place it at the center of the table.
- Each participant should take two minutes to pick up one crumpled-up sticky note that's not his or her own, read the crazy idea that is written on it, and then find a way to make it more realistic. For example, a participant who picks up a note that reads, "What if we paid people to vote?" might scale the idea back (since it's technically illegal) by writing, "What if we got a local philanthropist to put up a \$1 million prize for an 'electoral lottery' that gives people who vote an automatic chance to win the lottery and get 'paid' for voting?"
- At the two-minute mark, participants should stick the revised sticky note in quadrant 2 and then share what is written on it (i.e., both the crazy idea and the scaled-back idea) with the rest of their small group, in 30 seconds or less.
- Once everyone has had a chance to quickly describe their example, they should take five minutes to reflect and build on the ideas that were just presented. The facilitator should capture additional ideas on sticky notes and add them to the template.
- With two minutes to spare, each small group should stop the discussion and circle the three or four most repeated and/or craziest ideas.

### Activity 3: Free association (~20 minutes)

**Speaking notes for facilitators:** History is full of stories about innovative ideas that came to mind during REM sleep, on leisurely walks, or in the shower. During these activities, the mind is busy making chaotic and semirandom associations between hunches and half-baked ideas in ways that can help us complete a hunch or open the door to previously overlooked observations.

Because innovation is spurred by such serendipitous and accidental connections, it's important for us to create spaces where this kind of free association is allowed. The next activity attempts to create such a space by asking you to connect the challenges you're thinking about to a set of random pictures in a way that may prompt new thinking.

- Set two identical stacks of pictures (Appendix C) at each table, facedown. Let participants know that the two stacks are exactly the same, so they should look at the one that's closest to them. Also acknowledge that not every picture will speak to the participants, and that that's okay too.
- Participants should take three minutes to look through a series of six pictures, with 30 seconds per picture. (The small group facilitator should flip through the pictures at 30 second intervals.) As participants look at each picture, they should think of as many principles that come to mind related to the selected design challenge. For example, if the design challenge is "encouraging more local residents to vote" and the picture presented was of the V formation created by migratory birds, a participant might write, "Follow the leader — convince the leaders of social groups to vote, and others will come along." Participants should capture all of these principles on their notepads.
- At the three-minute mark, participants should pick their best example, write it on a single sticky note, and affix it in quadrant 3. Cluster those sticky notes that convey similar ideas.
- Once participants have had a chance to select their best example, they should share what they wrote on their sticky note with the rest of their small group, in 30 seconds or less.
- Once everyone has had a chance to quickly describe their example, the small group should take five minutes to reflect and build on the ideas that were just presented. The facilitator should capture additional ideas on sticky notes and add them to the template.
- With two minutes to spare, each small group should stop the discussion and circle the three or four most repeated and/or most interesting principles.

#### **Activity 4: Overcoming constraints (~20 minutes)**

**Speaking notes for facilitators:** It can often be difficult to come up with creative solutions when starting with a completely blank slate. In many cases, imposing constraints can actually be a helpful tool for prompting innovation, because the limitations force people to think outside the box. This exercise imposes difficult constraints on the conversation as a way to push participants to think of solutions that go beyond traditional approaches.

- Participants should take 15–30 seconds to think about the most common way(s) that community philanthropy organizations (including their own) address the design challenge. For example, if the design challenge is “encouraging more local residents to vote,” a participant might think about “recruiting volunteers to register residents outside of the local grocery store.” Participants should not overthink this task but rather go around the table and share the first approach that comes to mind.
- For this next exercise, participants will operate under the following constraint: all of the approaches that were just mentioned are off the table. Participants should take the next two minutes to reflect on other approaches the organization could take to address the design challenge, capturing each approach on a separate sticky note.
- At the two-minute mark, participants should go around the table and each read one sticky note to the rest of the group, posting it on quadrant 4. Do not repeat approaches, and go around the table until no more new approaches are left.
- The small group should then take five minutes to reflect on the ideas that were just presented. The facilitator should capture any additional ideas that come up in the course of the conversation on sticky notes and add them to the template.
- With two minutes to spare, each small group should stop the discussion and circle the three or four most repeated and/or most interesting approaches.

#### **Break (15 minutes)**

#### **Shaping concepts worth testing (35 minutes)**

Activities 1–4 will have yielded a template full of ideas and principles related to the design challenge. Having completed up to four exercises, each table will reflect on the ideas discussed and think about which of them might be worth further consideration. There is no defined methodology for sorting through ideas: it’s about diving into the ideas, picking out ones that stand out, mashing other ideas together, and building on new trains of thought. Each group should talk through the ideas until they develop a short list of concepts that might be worth prototyping.

- Each small group should take 10 minutes to review its completed template, including the analogous examples, crazy ideas, and interesting principles, and other approaches circled. On a flip chart, the facilitator should help the group capture any patterns that emerged across the template, interesting ideas (or fragments of ideas) that may be worth keeping, and/or new ideas that come to mind.
- Next, the group should take 15 minutes to begin shaping concepts that may be worth prototyping. At this point, participants don’t need to know how they will test the concept, they just need to determine which concepts may be worth exploring further. For example, a concept for the design challenge “encouraging more local residents to vote” may be “the establishment of an electoral lottery” idea, or it might be a mash-up of several other ideas. Make sure that the ideas you develop address the original design challenge.
- With 10 minutes to spare, the small group should write a clear pitch for each of their promising approaches. (Note: If multiple small groups are conducting this exercise simultaneously, they should share their top two concepts with the full group, in a minute or less. If none of the small groups came up with a concept they’re excited about, they should look for themes across their concepts as a way to get to a concept that sticks.)

Congratulations! You have now identified a set of ideas for improving your work and serving your community. Go on to the next steps section to find out what you can do to build on and refine these concepts.

## Next steps

This workshop can lead to several different follow-on activities, briefly described below:

- **Get your entire organization involved, leveraging the creative energy of staff and/or board members.**
  - Host a brown-bag lunch that allows *anyone* at your organization to participate in the Generating New Ideas workshop. This can double as an opportunity for finding champions in your organization who are interested and qualified to move an idea forward.
- **Prioritize concepts that are worth exploring and prototyping.**
  - Once you've created a short list of concepts, leverage your staff and close advisors to help you decide which concepts might be worth prototyping. Make the outreach material (i.e., the pitches for each of your concepts) short and fun.
  - Use the **Prioritizing Roles** exercise to gain greater clarity about the roles you play today and the aspirational roles you might want to play in the future. *Where in your portfolio do the concepts you developed fall?* Make sure that the concepts are spread across both current and aspirational roles.
- **Further develop priority concepts into viable prototypes.**
  - Use the **Prototyping Solutions** exercise to play out what your most promising concepts might look like if you decided to implement them.
- **Conduct user-centered research to better understand the constituents that your concept will touch.**
  - Undertake a process for better understanding the needs of constituents who would be affected by your concept, and use the insights you gain to inform the prototypes you go on to develop. With only limited resources, you can recruit a handful of skilled staff members to follow open-source user-centered design protocols like IDEO's Human-Centered Design Toolkit. With more resources, you can hire a consultant or design firm to execute a more elaborate user-centered design process.
- **Address orthodoxies that could get in the way of further pursuing certain concepts.**
  - Assess whether the new concepts you shaped might challenge ingrained assumptions about what your organization does and how your organization functions. If you find that this is the case, consider facilitating a **Flipping Orthodoxies** exercise to help your staff and board challenge orthodoxies that may be obstacles to generating new ideas.

## Appendix A: Ideation rules

There are many different sets of rules for brainstorming. We'd like to use the Seven Brainstorming Rules laid out by IDEO in the [Human-Centered Design Toolkit](#):

### **Defer judgment.**

There are no bad ideas at this point.  
There will be plenty of time to judge ideas later.

### **Encourage wild ideas.**

It's the wild ideas that often create real innovation.  
It is always easy to bring ideas down to earth later!

### **Build on the ideas of others.**

Think in terms of "and" instead of "but."  
If you dislike someone's idea, challenge yourself to build on it and make it better.

### **Stay focused on the topic.**

You will get better output if everyone is disciplined.



### **visual.**

Try to engage the logical and the creative sides of the brain.

### **Have one conversation at a time.**

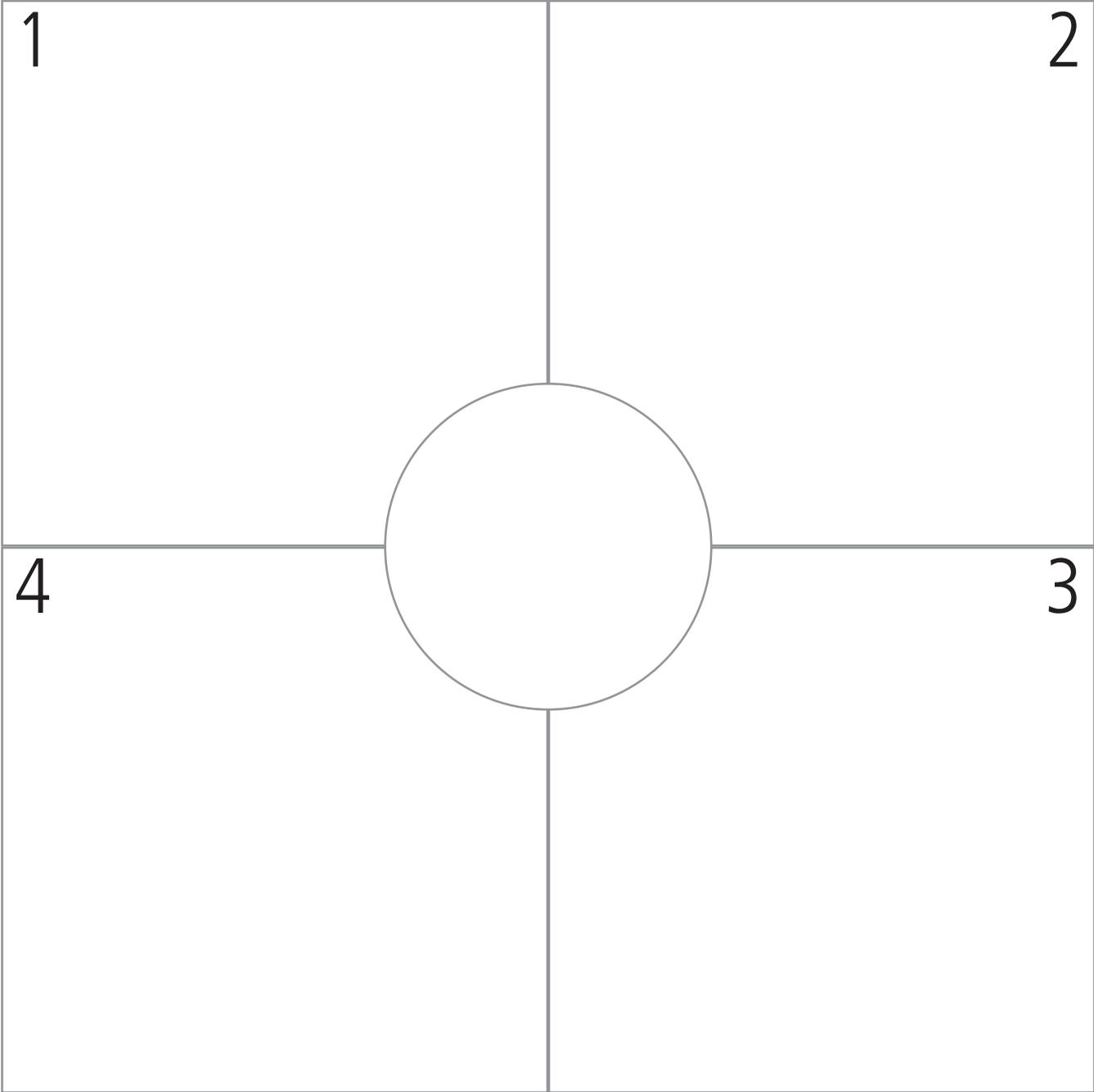
Allow ideas to be heard and built upon.

### **Go for quantity.**

Set a big goal for the number of ideas and surpass it!  
Remember that there is no need to make a lengthy case for your idea since no one is judging.  
Ideas should flow quickly.

# Appendix B: Ideation template

Re-create the design below on a large flip chart or white board. The center circle should be large enough to write in your design challenge — the “something” that you are working to fix or think creatively about. Each of the four quadrants should be large enough to accommodate about 10–12 3” x 5” sticky notes that participants will generate during each part of the four-part exercise. To make the experience more fun, we recommend making the ideation template the shape and size of the table — and laying it flat on the table for participants to write on directly.



## Appendix C: Free association pictures

Print out the attached PDF file of free association pictures (refer to thumbnails below), single sided and in color if possible.

Make sure you print two sets for each small group and place them face down on the table at the beginning of Activity 4.



Source: [Fazio / iStock](#)



Source: [Robert Schmitt / William Warby](#)



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