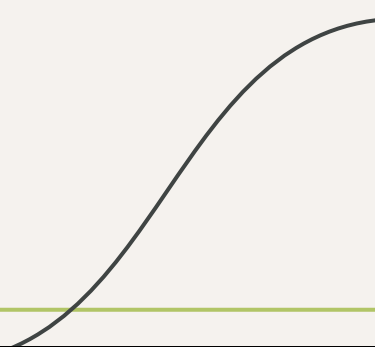# WiLS

Process Design

A strategic approach to project decision-making

For each major project decision, build your process brick by brick

1. Determine who needs to be involved
2. Determine what decisions need to be made and how you will make them
3. Determine how you will validate decisions
4. Determine what you need to know/learn
5. Determine activities to collect information

Process and process design is a lot about making decisions. And, in order to make good decisions, there are some things you need to consider every time. Now, depending on the importance of the decision, you may or may not need to spend a lot of time or effort on each of these things. But we think that the best decisions are made by at least thinking about the 5 elements I'm going to discuss.

01

Determine who needs to be involved.

Defining participant roles

- Responsible - who performs the work?
- Accountable - who is responsible for decisions?
- Consulted - who needs to provide input for decisions?
- Informed - who needs to be informed of decisions and progress?

Improves chances of success: want people on the bus with you
When addressing an issue or pursuing an opportunity, the result is likely going to be change to what exists or the addition of new. This requires change acceptance by staff, community members, partners. Validation helps with buy in and credibility to any change.
Could potentially provide resources: time, money, marketing support, reputation

Example: *Establish internships for high school students to conduct oral history interviews*

Responsible	• Grant-funded project manager • High school guidance counselor
Accountable	• Planning committee of project stakeholders from the community • Project leader(s) from the library • Project leader(s) from the school
Consulted	• Other libraries w/ high school intern programs • APP cohort & mentors • Oral history experts (paid consultant) • Participating students • Interviewees
Informed	• Library leadership and staff • School leadership • Interviewees • Community members • Grant funder

5

This is a tool to think through the different participant roles that are needed as part of a process. These roles are used in lean methodology for project planning.

Responsible - could be internal to your organization if you are leading the way with this, could be stakeholders, could be outside expertise such as a facilitator or a project manager for one or more of the major activities. –

Accountable - Who makes the decisions? can it include all the stakeholders you've identified, or as you go through this are there decisions at different parts of the process that could be done representationally or does the overall process need representational steering

Consulted - who are the - why didn't you ask me or so and so people

Informed - who are the, I don't want/need to be involved people, but if I'm not informed as this goes along to be able to be in the know and provide feedback if I want, I'll be the person at the end that says, wait a minute, what's happening and why didn't I know about this.

2
Determine which decisions need to be made and how.

At whatever point you are in designing your process, you'll want to think about how decisions will be made. This, again, can be from the simple where a person or project team is empowered to make a decision, to a facilitated process to come to a consensus that is necessary to 1) make a more complex decision and 2) get more buy in and involvement that's needed to make this project successful.

Letting people know how you will make decisions when you plan your process adds transparency and trust - back to the shared authority concept.

Process tools for group decision making includes:

1)Facilitation which allows for discussion to allow ideas and opinions to evolve to find common ground. It's important to determine if making a decision requires consensus or not.

2) Prioritization or weighting can be a sticker dot exercise or using a decision making matrix where people assign a weighted score to different options. This can be used to help a consensus decision making process or can be used when you are doing a majority vote.

3
Determine how you will validate decisions.

Depending on the importance of the situation, you may want to validate the decision and make sure it's a good decision. This can be very strategic: who do you want to feel like they had a chance to sign off? Or it could be checking with someone that might have outside perspective having already done the same thing you are working on.

Feedback

Conversation

Facilitated meeting

In this case, "people" may be those people you've identified as being important to the process. Or it could be someone completely outside the process who can give you new insights.

Overall, part of the goal is to get fresh outside eyes..someone who can look at your decision and give you feedback: reality and gut check
So, might be good to run by ALL patrons or a library you trust who hasn't been involved at all -- someone who can look at it and say, "Yep! Sounds good!"
By the way, that's what we're here for, and what your fellow cohort members are here for!

4

Determine what you need to know or learn.

The next component is determining what you need to know/learn in order to make a decision

We've all heard that old adage about assumption. We want to base our decisions on information rather than presumption or what we think we know. So, in this component, we take the time to think about what information we need to gather or what research we might need to do in order to have what we need to make an informed decision.

We are only thinking about what information we need at this point, not how we are going to get it…..that comes later.

Facts/Data: what exists in the community already, need, budget/possible funding sources, other available resources (personnel, etc.)

Opinions of those involved: staff, partners, potential users

Options: what have other libraries done?

5

Determine activities to collect information.

You've determined who needs to be involved. You've determined what information you need to make your decision. Using these two components together, you're now ready to think about the activities you'll undertake to collect information.
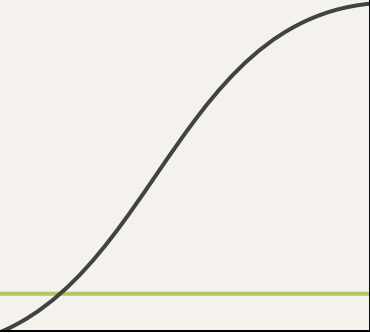
How do you do this?

Feedback: surveys, poll, focus groups, social media

Conversation: one-on-one, informal group conversations

Facilitated meeting: more formal group conversation

Research

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But don't get married to it!

You are mapping out the process as a starting point. You may find that you need to change things...and that's totally okay.   Decisions you need to make and what you will do for the different considerations will be more solid with your initial decision points and be a little more fuzzy down the line. That's because each major activity/decision more clearly frames the next major activities/decisions you need to make. The order of decisions you determine you need to make for your process is often based on dependency – before I can make this decision, another decision must be made.