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Facilitating Creative Problem Solving When Big News Interrupts

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Facilitating Creative Problem Solving When Big News Interrupts by

Philip E Marks

An Abstract of a Project in Creative Studies

Submitted in Partial Fulfillment of the Requirements for the Degree of

Master of Science

May 2018

Buffalo State State University of New York Department of Creative Studies

Abstract

The objective of this Project was to design and deliver a 2.5 day workshop for Human Resources leaders in a large corporation. The workshop objective was to give these leaders tools and a creative experience as they develop an action plan to "Ignite Innovation" in their organization, thereby fulfilling the Human Resource team's vision. Unfortunately, during the workshop, the organization announced that it was being sold by the present ownership and purchased by a larger organization. This big news disrupted the workshop and its participants, and the objective became, how to facilitate change when the future had just become uncertain for the participants and for the facilitator? By the end of the workshop, the original objective was achieved, and the facilitator was able to model creativity in action. This workshop has become an example of personal and organizational creativity in action, and therefore it might be a model and an encouragement to budding CPS facilitators.

Keywords: Innovation, creativity, workshop, organization, human resources, pivoting

Philip E Marks

May 13,2018

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Buffalo State State University of New York Department of Creative Studies

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> Master of Science May 2018

Dates of Approval:

May 7, 2018

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May 13,2018

Philip E. Marks Student

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Table of Contents

Abstract Title Page	i
Abstract of the Project	ii
Title Page	iii
Signatory Page	iv
Copyright Notice	v
Dedication and/or Acknowledgment Page	vi
Table of Contents	vii
List of Tables and Figures	viii
Section One: Background to the Project	1
Section Two: Pertinent Literature	6
Section Three: Process Plan	18
Section Four: Outcomes	19
Section Five: Key Learnings	28
Section Six: Conclusion	32
References	34
Appendix A: Workbook contents	36
Appendix B: Evaluation Summary	42
Digital Commons Online Permission	44

Tables and Figures

Table 1: Project Timeline	18	
Figure 1: 2.5 Day Workshop Plan	19	
Figure 2: Revised Day Two Workshop Plan	24	

SECTION ONE: BACKGROUND TO THE PROJECT

Purpose and Description of Project

The purpose of this Master's project is to design and deliver a 2.5-day workshop for my company. The workshop will be designed to inspire and prepare the company's Human Resources Leadership Team (HRLT) to fulfill the HR Vision to "Ignite Innovation" throughout the company. I will teach and model the Creative Problem Solving (CPS) framework while facilitating the HRLT's problem solving process, exiting the workshop with a viable action plan that they can implement immediately. Side outcomes of the workshop will be an increased awareness of the organizational climate for creativity through the use of the Situational Outlook Questionnaire® (SOQ) (http://www.cpsb.com/assessments/soq), as well as a common creativity language and insight about personal creative thinking style through the use of FourSight® (https://foursightonline.com/) and the Creative Problem Solving (CPS) Thinking Skills Model (Puccio, Mance & Murdock, 2011).

Background

The company is a \$4.5B business primarily serving an automotive industry on the brink of disruptive change, most notably the change from the internal combustion engine to electrical or alternative-fuel propulsion systems. Depending on the speed and nature of this change, the company's existing internal combustion engine products could rapidly experience a decline in demand, jeopardizing the company's future. Additionally, the company is well known for its innovative products, however, a large part of the management team believes process innovation lags the competition (including manufacturing processes, business processes, and customer engagement activities). This weak process innovation constrains the company's competitiveness in its core business, highlighting a need for incremental innovation as a profitable bridge until the disruptive market change is clarified. Altogether, there is a desire to become innovative

throughout the business. This desire has been translated into an initiative within the HRLT, who are assigned the task of "Igniting Innovation" as part of the HRLT vision.

During 2017, the HRLT developed a new vision to "Ignite Innovation, Engage Our People, and Drive Our Future". The meaning and consequences of this strategic vision have not yet been transformed into clear tactics and action. Meanwhile, some relevant actions have been separately initiated by other business functions. For example, the company's Tech Council, comprised of the heads of Research and Development from each business unit of the company, held an Innovation Forum in December 2016. Outputs of this Innovation Forum were a clearer understanding of the status of product innovation within the company, and some specific actions by the Tech Council to improve the company's product innovation. Additionally, the Executive Committee, comprised of the company CEO and his direct staff, is applying the Situational Outlook Questionnaire (SOQ) (http://www.cpsb.com/assessments/soq) to assess the climate for innovation throughout the top management levels of each business unit of the company. In short, there are disjointed innovation-related actions in progress throughout various parts of the company. It would greatly benefit the HRLT to become aware of these actions, and to pull them together into one cohesive strategy, or at least to support the actions that are gaining traction.

I have been deeply involved with most of these company actions since my professional direction emerged in 2014. In 2014, I envisioned a role of creativity coach for the company, a role that would utilize my technical and business development experience and growing skills in creativity and professional coaching to help business leaders achieve their personal and corporate creativity goals. I had observed that when leaders of innovative business units were promoted to leadership of less innovative business units, they often tried to "cut" what worked in the first business unit and "paste" it into the second unit, usually with limited success. It seemed that a

modular, customizable, flexible, and bespoke to each business unit approach to innovation might work better.

My vision has materialized: I am now a certified professional coach, certified in creativity and change leadership, and am pursuing a Master of Science in Creative Studies. While obtaining these certifications, I have facilitated creative problem solving workshops using CPS, including the previously mentioned Tech Council Innovation Forum. I have also been certified to administer the SOQ, which I first applied to the Tech Council, and most recently have been assessing the top two management levels of each business unit. Based on the SOQ results, I am facilitating CPS workshops for several business units as they convert the SOQ insight into actions driving creative climate change in the organization. In March, I presented the combined top management climate results to the company's Executive Committee, who directed me to continue working throughout the business to teach, train and coach creativity. As such, this HRLT workshop is timely and very pertinent.

The following CPS and/or creativity concepts or skills will be involved in this project:

- 1. Creativity beliefs and principles
 - a. Creativity is a universal, fundamental human characteristic
 - b. 4P's of creativity (the workshop design is based on the 4P's): the creative person, creative process, creative product, and creative press (Rhodes, 1961).
 - c. Divergent and convergent thinking
- 2. Teaching creativity principles and CPS
 - a. Definitions
 - b. Thinking skills model (Puccio, Mance & Murdock, 2011)
- 3. CPS Facilitation

- 4. Organizational creativity
- 5. Creativity measures and assessments (FourSight and SOQ)

The following personal goals about creativity, leadership, or change will guide my learning during this project:

- Learn more practical applications of being a Catalyst, Coach, and Facilitator.
 Increase confidence through practice.
- 2. Inspire and educate other aspiring creativity catalysts. My journey might encourage others to ignite change within their own organizations. I want to observe, reflect, and document well, so these future catalysts can benefit from my experiences.
- 3. Learn more about how 'old', 'structured' organizations approach change. How do existing functions change? How might one function's change ripple across the organization? How do organizational dynamics effect change initiatives?
- 4. Develop professional opportunities across the company (and ultimately outside the company). I want to further emerge as a creativity catalyst and coach within the company, and have the HRLT use me and recommend my services to others.
- 5. Improve teaching skills, specifically skills for teaching creativity concepts and tools.

Rationale for Selection

I am highly motivated towards success with this project. It is perhaps a pivotal moment in my career direction, combining my passions for creativity and coaching in a tangible, visible forum. More inspiring, however, is that in many ways it is a pivotal moment in the company's innovation initiative, and we might someday look back at this workshop as a significant step forward in the company's history. The HRLT is responsible for equipping the company's leaders and staff with the necessary tools, skills and mindset to create the desired working

environment, enhance employee health and well-being, and reinforce and develop the company's core values. In a successful project, the HRLT will experience some increased awareness and fundamental shifts in their own creative thinking. They will also experience creativity in action as they develop a viable action plan. This might lead to an optimistic 'can-do' attitude together. Any transformative shifts will affect them as they ignite innovation throughout the company. Additionally, a successful project might show them that I am a capable and passionate resource who will continually support and enable them on this journey.

SECTION TWO: PERTINENT LITERATURE

Introduction

For the purposes of this project, I will use a classic definition of creativity, that is, novelty that is useful (Runco and Jaeger, 2012; Stein, 1953). Innovation differs from creativity in that implementation is required (Pauwels, 2017); that is, innovation is the implementation of novel options to extract the useful value. Innovation is therefore dependent upon creativity. Without novel and useful options, there would be nothing to implement. Notably, without the implementation there is little value in the creativity; it remains in a potential state.

In an organizational context, there is an inherent need for group creativity and implementation. In other words, organizational innovation is a group construct. Perhaps creative options can emerge from individuals, but the implementation requires group (organizational) behaviors. Obviously, group behaviors involve leadership and participation. A goal of this workshop is to raise the group dynamic such that the individuals and the group will continue to function with greater deliberate creativity after the workshop concludes. Another goal of the workshop is to achieve the clients' desired outcome, which is a viable action plan to drive innovation through the company.

To structure the workshop, I am incorporating findings from the vast pertinent literature on organizational creativity and innovation, facilitating and teaching creativity, and creative leadership. I believe these facets of organizational behavior and learning will most inform an effective workshop design and facilitation, and they will increase the likelihood of increasing group creative behavior, before, during and after the workshop.

Organizational Creativity and Innovation

Brown, J. (2016). From creativity to team innovation: Building the bridge in organizations.

Creative Studies Graduate Student Master's Projects. Paper 252.

Following an extensive literature review, Brown (2015) concluded that "participative safety, participation in decision making, challenge in teams, and support for innovation are critical components of team innovation" (p. 21). Brown then went on to develop a model for assessing the readiness and maturity of teams towards innovation. What is especially interesting is that the model begins with team identity and team mission, answering the questions "who are we?" and "why do we do what we do?" as a means to establish common ground through core values. Brown's model has a strong overlap to comments made by my client, who (during a client interview) confided that group intimacy was an influencing variable to past team success, as well as group alignment towards a common ethical and moral cause. She suggested we begin the workshop with some way to establish the team's "inner why" by personally answering the question "Why do we exist as an HR team?"

Puccio, G.J., & Acar, S. (2015). Creativity will stop you from being promoted, right? Wrong! A comparison of creative thinking preferences across organizational levels. *Business*Creativity and the Creative Economy 1(1), 4-12.

The authors proposed that creative thinking is a key distinguishing feature of leaders. Specifically, leaders at higher organizational levels show a preference for ideational thinking style, marked by visionary thinking, looking at the big picture, and being open to change. To a lesser degree, but still significantly, leadership at higher organizational levels also shows a preference for implementation thinking style, marked by a proclivity for action and willingness to take risk. As problems become more ambiguous, ill-defined and novel, there is a need for new

solutions and action despite uncertainty. The authors concluded that creativity training, specifically training in divergent thinking, can help develop ideational skills and creative abilities. As team creative efficacy and risk-taking increase, the need for transformational leadership is muted. This all fits with the purpose of the workshop: to develop the creative efficacy of the HRLT. While the support of the HRLT leader is certainly needed to begin the change, her goal is to provide the team with the creative confidence to propagate change through the rest of the organization. Therefore, a primary goal of the workshop is to raise the creative ability of the HRLT, and to make them aware of their increased ability. Because they are experts in HR practices, creative efficacy plus domain knowledge should lead to capability to solve the complex organizational challenge of igniting organizational innovation.

Widmann, A., Messmann, G., & Mulder, R.H. (2016). The impact of team learning behaviors on team innovative work behavior: A systematic review. *Human Resource Development Review*, 15(4), 429-458.

This study synthesized 31 articles that reported team learning behaviors (TLB) and team innovative work behavior (TIWB) with the goal of identifying the most impactful behaviors on TIWB. This is especially relevant because the objective of my workshop is to enhance the creativity of the team (i.e. TIWB), not just expose it to creativity exercises and activities. Three team learning behaviors were identified as most impactful to TIWB: sharing, team reflection and team activity. Sharing represents the exchange of knowledge and opinions between team members to create a joint knowledge base. Team reflection is deliberate, corporate contemplation of the team's current understanding of its tasks, goals, and responsibilities. Team activity refers to the team learning through its experiences together, i.e. learning by doing. While the authors studied these behaviors in the context of daily team work, I believe that a well-

designed and delivered workshop can help initiate these behaviors. As such, the workshop should contain sufficient sharing opportunities, points of reflection together, and experiential group learning. At the end of the workshop, I intend to incorporate a general reflection of how to carry the learning forward into daily team work.

Zhou, Q., Hirst, G., & Shipton, H. (2012). Promoting creativity at work: The role of problem-solving demand. *Applied Psychology: An International Review.* 61(1), 56-80.

The authors related Problem-Solving Demand (PSD) to creativity in the work environment, because complex and intellectually demanding problems force employees out of routine thinking and establish inherent openness to novelty. On the basis of this relationship, the authors linked job design to creativity, theorizing that jobs with high PSD will challenge employees to seek more information, learn new skills, and be open to possibilities. They also established a mediating effect of self-efficacy, which is "the belief that one has the ability to produce creative outcomes" (Tierney & Farmer, 2002, p. 1138). When forced to learn new skills and knowledge, employee creative self-confidence rises. As they gain confidence in their creative capabilities, a virtuous cycle is established whereby the employees are willing to contribute extra effort to achieve creative outcomes and become increasingly less satisfied with routine solutions; in turn, their creative performance rises. Finally, the authors found that PSD only related to self-efficacy when intrinsic motivation towards the task was present. Besides the direct learning of these relationships, this article informs my workshop design as well as my evaluation design. Given the high domain knowledge of the workshop participants, there may be a tendency to revert to routine solutions. The workshop design might therefore be enhanced by deepening the participants' concern for the challenge, and via questions we might clarify that typical solutions have not worked. This might enhance the participants' desire for and openness

to novel thinking. Similarly, the workshop is designed to raise self-efficacy through creative self-awareness and also through carefully selected warm-up exercises. The evaluation design might further explore the degree of self-efficacy gained through the workshop, for example, by asking the same questions before and after the workshop in an effort to establish changes in creative confidence.

Facilitating and Teaching Creativity

Bell, S., & Morse, S. (2013). Groups and facilitators within problem structuring processes. *The Journal of the Operational Research Society*, 64(7), 959-972.

The authors recognized that facilitators usually rely on intuition and experience to observe and respond to (pivot) group problem solving dynamics. As such, practitioners' effectiveness is mostly dependent upon their experiences and requires time to develop. To shorten the learning cycle, as well as to enable effective group self-regulation, the authors proposed that recognizing group dynamics might become a more analytical process. In this context, the Triple Task Method (TTM) of problem solving facilitation is proposed and examined. Task 1 is the most immediately visible task, that is, the actual problem solving done by the group. In this task, the group clarifies its problem, imagines and develops potential solutions, and forms a vision and action plan to overcome to problem. While Task 1 is occurring, Tasks 2 and 3 are simultaneously occurring, but these latter tasks are assessing of the group dynamics occurring during Task 1. Task 2 involves external observation of group interactions during each of the Task 1 stages. Task 3 involves self-reflection by the group participants; one relating to themselves, and another relating to the group. In this way, the facilitator and group gain three perspectives: the degree of success of the problem solving activity, the external view of group behavior, and internal view of the group interactions. Tying these three together, the authors concluded that group reflection and external observation provided a better sense of group behavior than the facilitator might make on his own. The 'inside out' view of the participants enriches the facilitator's 'outside in' view of group situations, especially in poor or struggling groups. While the 'inside out' view can help make the hidden accessible, the process of acquiring it from the group can cause pain, and the benefit is largely to the facilitator, who can adjust current or future workshops. Similarly, the 'outside in' view carries a significant risk if it is shared with the group: in other words, feedback from the facilitator to the group might provide group learning, but it may come at the cost of group pain and short-term production delays. The authors recommend that this type of feedback be accomplished via group self-discovery (guided by the facilitator) rather than direct feedback from the facilitator to the group. This approach makes sense to me in light of my facilitator training to assess and guide the process, not the content. This study is particularly insightful for effective facilitation: evaluate success via outcome only; avoid struggling group dynamics rather than address and resolve them; and recognize that all group problem solving activities are also learning opportunities – for the group and for the facilitator.

Kaner, S., Lind, L., Toldi, C., Fisk, S., & Berger, D. (2014). *Facilitator's guide to participatory decision-making* (3rd ed.). San Francisco, CA: Jossey-Bass.

This book serves as a facilitator's how-to guide for helping groups achieve decisions.

The author described the decision-making process as a series of opening, exploring, and closing stages. A variety of decision-making approaches (leader decides, consensus, majority vote, etc.) are also described, along with advantages and disadvantages of each approach. This is an excellent resource for facilitators when planning workshops and meetings, as well as settling into a facilitator's mindset.

Naizer, G., Sinclair, B., & Szabo., S. (2017). Examining the sustainability of effective professional development using a workshop design. *Delta Kappa Gamma Bulletin*, 83(5), 37-48.

The authors studied the effectiveness of annual 3-week training workshops delivered to teachers annually for eight years. Effectiveness was measured by sustainability, that is, how much of the information learned was still being used 2-8 years after the training workshops. The framework for the study was self-efficacy, that is, effective teachers will persist longer in difficult teaching situations, will put forth more teaching effort, and will feel more confident in their teaching. This study has both personal and workshop design implications. My own self-efficacy at leading workshops is in question, and in fact a learning objective of this project. At a workshop design level, the goal is to provide the HRLT with creative self-efficacy so they are more likely to model the way as they drive innovative behavior through the organization. Pauwels, P. ZH. (2017). Developing a leadership curriculum 'Innovation, Creativity and

Leadership'. Creative Studies Graduate Student Master's Projects. Paper 264.

Every project builds on something that came before it. In my case, Pauwels' (2017) project provided insight to the HR professional's thinking, especially about developing training curriculum towards creative leadership. While I believe that the HRLT workshop action plan will include more than just leadership development actions, certainly the HRLT leadership behavior will be a key aspect of any innovation initiative. Pauwels showed that leaders must possess creative problem solving skills to be effective change agents and transformative leaders. The specific skills are synonymous with creativity skills: openness to novelty, tolerance of ambiguity, and tolerance of complexity. Acquiring at least a small degree of appreciation for these skills must be ingrained in the workshop. An effective teaching approach includes three aspects:

heightening the anticipation, deepening expectations, and extending the learning (Torrance and Safter, 1990). As such, I intend to inform the HRLT at the outset of the workshop that they will be experiencing ambiguity and complexity (which I will ask them to embrace) as well as seeking novelty (which I will challenge them to open themselves to). During the learning I will be aware of novel, ambiguous and complex situations, and bring these back to the group during the final reflection. I'm also finding that the final reflection time might need to be longer than originally planned, in order to really carry the learning forward.

Vernon, D., Hocking, I., & Tyler, T.C. (2016). Evidence-based review of CPS tools: A practitioner's resource. *Human Resource Development Review*, 15(2), 230-259.

This study examined available research describing the use of Creative Problem Solving tools and their empirical outcomes. The goal of the study is to empirically define which CPS tools work best, in which situations. One of the greatest benefits of the study was that empirical findings open new awareness about how to most effectively use a tool for the intended outcome. For example, brainstorming can significantly affect ideation, "especially if the principles outlined by Osborn, which have since been developed and refined by others, are followed" (p. 241). This study has significantly forced me to revisit tool selection when designing and facilitating the workshop. Considerations in mind are: the team thinking preferences, degree of novelty desired by the clients, degree of novelty desired at various stages of problem solving, extraversion/introversion behavior of the group, amount of time allotted to the workshop, and how confident the team is in the solutions reached. This study also produced a new way for me to teach the value of separating diverging and converging: using the "going to a picnic" game to compare "yes, but" to "yes, and" ideation.

Creativity Leadership

Amundsen, S., & Martinsen, O.L. (2015). Linking empowering leadership to job satisfaction, work effort and creativity: The role of self-leadership and psychological empowerment.

*Journal of Leadership & Organizational Studies, 22(3), 304-323.

The authors empirically supported a link between self-leadership, empowering leadership, and creativity. When a person is given the skills and strategies to influence themselves toward higher levels of performance, they will likely respond with their own actions and positive perceptions, especially in overcoming complex and ambiguous challenges. This creates a virtuous cycle of empowering others to do likewise. Although this interrelationship between leadership and creativity may seem intuitive, the empirical support adds a level of credibility and instills confidence that any workshop which increases self-leadership will in turn effect a broader audience, as confident self-leaders empower others to change.

Hill, L.A., Brandeau, G., Truelove, E., & Lineback, K., (2014). *Collective genius: The art and practice of leading innovation*. Boston, MA: Harvard Business Review Press.

This book described how leading innovation requires a different leadership approach than the solo visionary leadership style that is common today. Specifically, the authors established that leading for innovation is primarily about establishing the context in which employees are both willing and able to innovate. The book is filled with interesting case studies from Pixar, Google, Volkswagen, IBM, and other companies that have made significant innovative advances in the past decade. Ultimately, this concept of "willing and able" shows up in a variety of other leadership studies, mostly as proactivity and efficacy.

Shin, Y., & Eom, C. (2014). Team proactivity as a linking mechanism between team creative efficacy, transformational leadership, and risk-taking norms and team creative performance. *Journal of Creative Behavior*, 48, 89-114.

This study concluded that team creative efficacy and risk-taking norms positively affect team creativity through the mediating effect of team proactivity. Surprisingly, transformational leadership was not related to team creativity. This latter finding is clearly contrary to substantial studies linking transformational leadership to team creativity. The authors posit that the role of transformational leaders might not be critical in teams that have high levels of creative efficacy and risk-taking norms. As creative efficacy and risk-taking norms increase, the need for transformational leadership might be reduced. This has interesting implications for self-directed teams, who might focus on raising efficacy and risk-taking as a means towards team creativity. This also has interesting implications for HR leadership in regards to training and organizational development objectives.

Creativity Assessments and Measures

Because I intend to use two creativity measures in the workshop, it makes sense to understand the important background details of both measures. This includes the history of the measure, its statistical reliability and validity, and ways in which the measure has been successfully used.

FourSight Technical Manual

Puccio, G.J. (2002). FourSight overview & rationale for creation. Retrieved from https://foursightonline.com/wp-content/uploads/2017/08/foursight-technical-manual-on-validity.pdf. Development of the FourSight Thinking Profile assessment began in 1992 when Puccio observed various preferences for different tools and stages of the CPS framework. This led to the development of a plain-language measure that overlays the natural creative thinking process. The measure continues to be refined, and each version is statistically validated. Reliability has been established through strong internal consistency of its four scales: clarifying, ideating, developing and implementing. Validity has been established vs. the KAI, CPSP, MBTI and Adjective Checklist. Interestingly, FourSight doesn't favor either the Adaptor or Innovator side of the KAI spectrum, indicating that CPS equally pertains to both incremental and disruptive creativity. Among the more valuable findings in this article are tables that link FourSight preferences to CPS tool preferences. These tables will be useful for workshop design, because I intend to structure the design around participants' preferences, and then reflect upon their reactions to the various tools used. Overall, this manual is useful for building confidence in the measure, in case challenged by any workshop participant.

Situational Outlook Questionnaire

Isaksen, S.G., & Ekvall, G. (2015). A summary of evidence for the Situational Outlook

Questionnaire: A technical resource for the SOQ. (2nd ed.) Orchard Park, NY: The

Creative Problem Solving Group, Inc.

The SOQ has a longer history than FourSight. It emerged in the 1980's as the Creative Climate Questionnaire (CCQ) and evolved over time. In fact, due to well-publicized use by large corporations such as GE, it has industry recognition, and is rarely questioned.

Nevertheless, statistical reliability and validity remain important, and the summary of evidence provides plenty of both. Interestingly, the SOQ also pertains well to both incremental and radical innovation.

Summary

A common theme of this literature review has emerged: team creativity depends upon efficacy and motivation, i.e. ability and willingness to solve problems creatively. This fits well with the workshop goals to develop team creativity and inspire them to ignite innovation across the company. Overall, the review has raised my confidence that training and experiential learning will raise a belief that CPS works, and that each HRLT member has creative potential and skill to apply it.

Conclusion

In addition to the above-mentioned sources, there have been additional works that have influenced my thinking. These include:

- Puccio, G.J., Cabra, J.F., & Schwagler, N. (2018). Organizational creativity: A practical guide for innovators and entrepreneurs. Thousand Oaks, CA: Sage.
- Schwarz, R. (2017). The skilled facilitator: A comprehensive resource for consultants, facilitators, coaches and trainers (3rd ed.) Hoboken, NJ: John Wiley & Sons, Inc.
- VanPatter, G.K., & Pastor, E. (2016). *Innovation methods mapping*. New York, NY: Humantific Publishing.

SECTION THREE: PROCESS PLAN

Plan to Achieve Goals

The overall plan for the project is to clarify the workshop objectives together with the HRLT leadership, design and develop a workshop plan with tools/activities that will best achieve those objectives, and then implement the plan during the workshop itself. An extremely important part of the clarification phase is to narrow the scope to the two or three most important outcomes that will enable the HRLT to begin to ignite innovation across the company.

Table 1: Project Timeline

Task (all meetings include preparation time)	Complete in Calendar	Estimated time to	Actual time to complete
	Week #:	complete (hrs)	(hrs)
Clarify workshop objectives via multiple	9	8	7
client meetings throughout February			
Initial agenda reviews to get key persons	7	3	2
aligned and to raise/resolve issues			
Revised agenda review	8	2	2
FourSight certification training	6	20	24
Prepare / Administer SOQ for HRLT	10	5	8
Project write-up Sections 1-3	10	20	22
Design the workshop activities, slides, and	11	20	30
tools (posters, etc.)			
Practice workshop activities	11	8	4
Revise workshop activities and slides	13	10	5
Final workshop design review with clients	13	2	1
Present the SOQ results prior to the workshop	14	2	2
(incubate)			
Deliver the workshop	15	16	12
Evaluate the workshop	15	4	4
Project write-up Sections 4-6	16	16	20
Write final project paper	17	16	18
Project presentation and sign offs	19	5	tbd
Total project hours		157	161

SECTION FOUR: OUTCOMES

Overview of Project Outcomes

I designed, developed, and delivered an experiential workshop to deliver an action plan for the Human Resources Leadership Team to ignite innovation across the organization, while increasing participants' creative self-efficacy. The overall workshop design is outlined in Figure 1. However, the workshop delivery was disrupted by an announcement that the company was being sold by the present ownership and purchased by a larger organization. The buying organization made it clear that there would be synergies created by the acquisition, i.e. some jobs

HRLT Workshop Plan:

Pre-workshop:

- ✓ SOQ report out, Eliana distribute white paper <u>purpose</u>: gather data for defining the current state
- ✓ Phil, Eliana and Jan summarize (bullet points) the known data

<u>Monday</u> 2.5 hours – FourSight Thinking Profile Debrief

Tuesday: 5.5 hours - Clarify

- Explore definition of "Innovation" using Fishbowl
- Introduce topic
- Targeting exercises to come to agreement on the desired state and current state of innovation
- Gap analysis to identify "what might be all the things that are stopping us from achieving the desired state?"
- Converge: hits/cluster to identify top challenges
- Teach "phrase challenges as questions to be solved"
- Rephrase top challenges as questions to be solved.
- Debrief Tuesday's session

Wednesday: 8 hours – Ideate, Develop, Implement, Debrief/Reflect

- Review Agenda / Ground rules / Team FourSight Profile
- Ideation warm up
- Teach POINt
- Work first challenge question as a big group
 - o Ideate solutions via stick-'em-up brainstorming
 - Hits/Cluster
 - WW(P)SODNI...
 - o POINt
 - WW(N)SODNI...
- Repeat on second and third challenge questions in smaller groups; Each group present solution statements
- Teach forced connections and brainwriting
- Repeat on fourth and fifth challenge questions; Debrief between groups again
- Create action plan from the solution statements
- Workshop reflection
 - Key learnings
 - Taking it forward
- Workshop evaluations

Figure 1: 2.5 Day Workshop Plan

would be eliminated, which created an emotional response for almost everyone involved with the workshop. My facilitation of the workshop was also affected by a challenging client. These two challenges caused me to significantly pivot and redesign the workshop during the delivery and are discussed below.

Workshop Design

I designed an experiential Creative Problem Solving (CPS) workshop that included all stages of CPS: Clarify, Ideate, Develop and Implement. It was modeled after Puccio, Mance, and Murdock's (2011) Creative Change Model, which includes the 4P's of creativity: person, process, press (environment) and product (Rhodes, 1961). The creative environment was designed to be understood through the lens of the participant experience and through the Situational Outlook Questionnaire (http://www.cpsb.com/assessments/soq). The creative person was designed to be understood through the lens of the FourSight Thinking Profile (https://foursightonline.com/). The creative process was designed to be understood through experience of CPS. The outcome of the workshop was expected to be many possible options for how the HRLT will ignite innovation in the organization. From the many possible options, the participants would select and develop those options which might best ignite innovation, and develop an action plan. Their readiness for implementation would be the final outcome of the workshop.

The workshop design was intentionally experiential in several ways. Prior to the workshop, the junior client interviewed the participants to gather "current state" and "desired state" characteristics of the organization. The participants also completed an SOQ survey of their perception of the organizational climate for creativity. The collected data was presented to the participants via phone conference one week before the workshop. The primary purpose for

this data collection was to create a comprehensive awareness of the climate for innovation across the whole organization – not just each participant's personal view. As such, the SOQ results presented were the corporate SOQ results of 210 upper and middle managers whom were recently surveyed. These corporate SOQ results were previously presented to top management in March 2018. The participants also took the FourSight assessment prior to the workshop. As with the SOQ, the reasons for participation were multi-dimensional: not only is the climate awareness useful as workshop content, as proponents of creativity and innovation it seems important for the HRLT to understand the various measures and assessments that the organization is using. As a result of having this personal experience, the HRLT might more effectively recommend measures and tools to the organization at appropriate times and situations. Second, the HRLT might immediately apply the measures and tools during and after the workshop, might become aware of their creative strengths and preferences, and might work together more effectively as a team towards creative outcomes.

The workshop was designed to generate creative solutions to an ongoing problem.

Everything about the workshop – environment, process, ground rules, toys, activities, tools – was intentional towards creative output, using the knowledge and experience I have acquired during the ICSC Master's program. Additionally, the workshop design was reviewed by experienced facilitators, one of whom has worked with some of the HRLT participants in a previous training session. These experts provided significant advice in the form of realistic timing, scope and sequence of activities, and also suggested warm-up activities that proved to be extremely valuable for focusing and upshifting the participants' energy throughout the workshop (B. Kalina, personal conversation, April 5, 2018). Significantly, the experts provided advice for facilitating a team with a high implementing preference and low ideating and developing

reference. This advice included time-bounding the activities, setting quotas as goals, and using 'hard' activities vs. 'soft' activities (R. Schoen, personal conversation, March 6, 2018). They also suggested I build in evaluation during the workshop, for example via daily reflection to enable more effective workshop evaluation at the conclusion (B. Kalina, personal conversation, April 5, 2018). Not only did I consult with experienced facilitators, I also consulted with a fellow classmate with a high implementing preference, to gather more personal insight about specific tools and techniques that resonate, work well, and/or should be avoided based on her experiences (T. Lawrence, personal communication, March 28, 2018).

The expert facilitator advice led me to create a workbook for the workshop (Appendix A). The first five pages of the workbook included blank in/out thinking pages, to help the participants stay present in the workshop as well as to teach the in/out thinking technique. The workbook also included raw data gathered in advance of the workshop; the same climate summary and SOQ data presented one week in advance. Although this data was printed on large posters and hung in the conference room, it was also included in the workbook for ease of reading, as well as for review outside of workshop hours. One of the more unusual parts of the workbook were two targeting worksheets which were used to gain awareness of how well the team agreed with the desired and future states of innovation climate within the company, as well as to solicit further perspectives about the existing and desired climate. Post-Its were placed into the workbook for "pushes" and "pulls", in order to facilitate the targeting activity. Finally, the workbook included an action plan template and daily reflection pages.

Workshop Delivery

I facilitated a problem solving workshop that delivered a viable action plan for the HRLT. This turned out to be much more difficult than I originally anticipated. I had been

forewarned by several of the HRLT that the team engages in very active debate, talks 'over' each other, and has difficulty making group decisions. During the facilitation, I came to understand that this 'love' of debate is not shared by everyone on the team. In fact, the propensity to debate resides in a handful of team members who possess a high clarifying preference, while the other group members tend to 'check out' via social loafing when they tire from debate.

A second and completely unanticipated facilitation challenge began to emerge on the first day of the facilitation and became fully apparent on the second day. On Day One, five of the 13 participants were unavailable due to some emergency. We proceeded with the Day One activity: a 2.5 hour workshop introduction and FourSight Thinking Profile debrief, which included a discussion about how the team thinking profile might affect the workshop itself. Without 1/3 of the participants, this was an auspicious beginning. I had planned to use all of Day Two for clarifying, using multiple activities designed to produce a team definition of "innovation" as well as to practice listening skills. However Day Two began with an emergency company-wide conference call with our CEO, informing us all that the company was being sold to new ownership. Not only was this significant news, it had multiple damaging effects to the workshop participants. First, an acquisition and merger with another company potentially places corporate jobs at risk. Second, as HR leaders, they faced immediate questions and emergency meetings with their divisions (as did I). Third, the HRLT members responsible for corporate communications, labor negotiations, compensation and benefits were continually needed before and immediately after the public announcement of the merger. Altogether, this created a feeling of uncertainty about the future of the HRLT and whether the outcome of this innovation workshop would have any significance in the future.

After consulting with the clients, we decided to suspend the morning's workshop plan, reducing Day Two activities to 1.5 hours of the planned 5.5 hours. Clearly, I had to pivot as a facilitator, and remove some planned workshop activities. The revised Day Two workshop plan

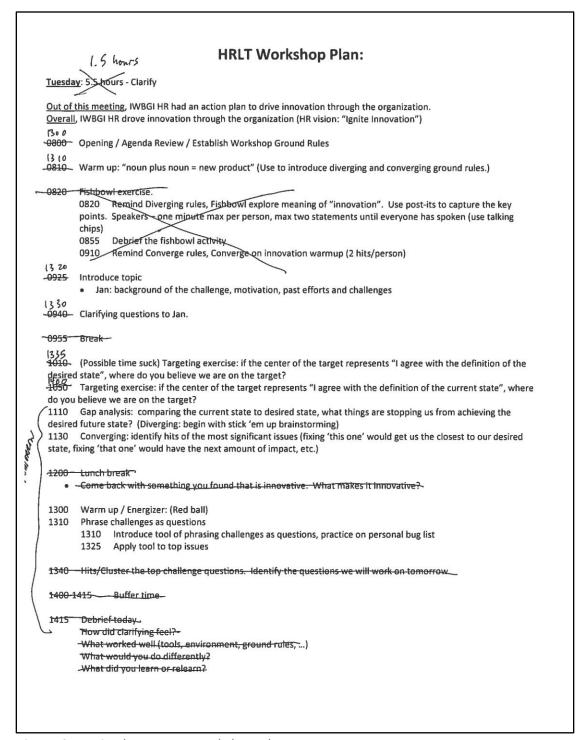


Figure 2: Revised Day Two Workshop Plan

(Figure 2) shows the degree of pivoting. This pivoting was a test of my flexibility, my self-management despite substantial ambiguity, and my ability to deliver the workshop essence in significantly less time than planned.

Happily, the revised plan allowed four more workshop participants to join, bringing the group total to 12 of the originally planned 13. Also happily, the super client spoke to the group concerning the importance of the workshop, and directed them to focus on the workshop and its deliverables despite the announcement and possible ensuing interruptions. We accomplished the targeting activity during the afternoon of Day Two, and set intentions for Day Three to finish clarifying by identifying the most important challenges to be solved, then ideating, developing and creating action plans for those challenges. From workshop evaluations (Appendix B), it was clear that the group was unusually engaged and focused on the workshop on all three days despite the unusual circumstances. The participants attributed their presence and engagement in large part to the many upshifting activities and variety of problem-solving tools used.

On Day Three, a new challenge emerged: the junior client felt that the CPS method was too 'digital' and a more dialectic method was needed. This was a new experience for me: having the previously agreed upon workshop design and CPS framework challenged by a client, who wanted to change the workshop design mid-delivery. She was obviously skeptical about the CPS process, perhaps due to a high clarifying preference and strong desire to debate. I did not see evidence of this desire to debate from the rest of the group, a fact the client did not deny. This situation placed me in a quandary: would it be in the client's best interests to continue with the design and hopefully achieve the desired outcome despite her wishes, or would it be in her best interests to modify the workshop design to accommodate a more dialectic approach, even if it placed the workshop outcome in jeopardy? After discussion with both clients (who were not in

agreement), we proceeded with a slightly modified design: we followed the CPS framework for ideation and development, but inserted a facilitated round-table discussion on each of the selected challenge questions. Based on workshop evaluations, only one person expressed that there was insufficient discussion on each topic, so it seems this adjustment was appropriate.

In the end, the group developed a three-point action plan with accountability and timing, which everyone agreed would help to ignite innovation across the company. Several persons expressed that the actions in the end did not seem so "innovative". Others noted that there were innovative ideas that were left on the flip charts. Upon reflection, the team chose action items based on specific criteria, including feasibility to implement, and within the scope of HRLT. Significantly, several participants noted that to achieve any action plan was a huge win for the group, and several mentioned that their regular meetings might need to be facilitated by a third party to continue the momentum started by this workshop.

Increase Participants' Creative Self-Awareness

I had planned to increase the workshop participants' self-awareness of their own creative behaviors and strengths using FourSight assessment, modeling creative behaviors, and embedding opportunities for reflection into the workshop. I believe this was accomplished, although the extent to which it was accomplished is not yet clear to me. Not everyone participated in the group FourSight Thinking Profile debrief, so I debriefed the others during lunch and other off-hours. Several evaluation comments reflect the language and context of FourSight and CPS, which leads me to believe that some awareness was raised. Other evaluation comments reflect that participants had fun, that reflective learning occurred, and that I modeled creative behaviors such as risk-taking, openness to new ideas, and flexibility. I did not directly observe the participant's daily reflections, making it difficult to conclude self-efficacy. As a

conclusion to the workshop, I challenged the participants to put their experiences into action after they leave the workshop, specifically by phrasing problems as questions that can be solved, using POINt to evaluate new options, and separating divergent and convergent thinking.

Notably, during the first HRLT meeting following the workshop, an HRLT team member suggested that we diverge and brainstorm some options.

Workshop Materials

I created slides, posters, and inspirational quotes such that all can be used for future facilitations, not only within the company, but also outside the company or with the new ownership. The workbook handbook turned out to be extremely useful, and this approach will be added to my facilitator's toolkit. Images of this workbook can be found in Appendix A.

SECTION FIVE: KEY LEARNINGS

Overview of Key Learnings

Among the many lessons learned or reinforced during this project, several particularly stood out. Pragmatically, 'client centric' doesn't always mean that facilitators do exactly what the client requests. Successful pivoting during workshop delivery required self-management and risk-taking. As a follow-up to the workshop, I learned about a dialectic problem-solving approach. Finally, I made several observations about organizational change and how change might occur in large organizations.

How to be Truly Client-Centric

I recently became aware that I have been designing workshops towards my preferences for ideation and this workshop provided an ideal opportunity to design around client thinking preferences. In this case, the resource group had a high implementing preference with a significant clarifying preference, as well as very low ideating and developing preferences. The creativity community was extremely helpful and supportive in helping me design short, intense, time-bound activities for ideation and idea-development. I also learned a useful technique for managing potentially combative debates, called "Talking Chips" (Gray, 2010).

In addition to workshop design, I also learned ways to facilitate and communicate with a group that prefers direct, concrete statements, and is not easily offended by direct instructions and interruptions. This includes the type of instruction given, clearly stating the duration and rationale of each activity, adding numerous upshifting activities, firmly reinforcing process rules, and interrupting the clients and resource group discussions when necessary. I am very happy to receive feedback that my facilitation style was "firm but friendly", since I was frequently self-conscious about interrupting the group or cutting people off from continued debate. In fact, this

facilitation experience caused me to really focus on the facilitation and ignore my own preferences and judgments. Because I was not using my preferred facilitation style, I found the facilitation experience to be quite energy-draining. It would be good to plan personal recovery time for future facilitations.

Managing Ambiguity

The key learning here was around managing the ambiguity while still landing the workshop outcome. The workshop provided many more ambiguous situations than I expected, and I found myself continually observing and quickly managing my personal emotions and reactions in order to serve the client and the process. The super client and junior client were not always on the same page, despite the importance of their alignment being discussed with them prior to the workshop. Obviously, the big news on Day Two provided a huge amount of ambiguity, which personally I didn't find too difficult to manage because it was concrete and could be handled through agenda changes. What I found more difficult to manage was the ambiguity caused by the junior client who wanted to dictate the process rather than trusting the process. In other words, I learned that for me, process ambiguity is easier to manage than people ambiguity, which requires negotiation skills, emotional intelligence, and tact. I also learned the importance of having multiple upshifting exercises ready at all times, to keep the group engaged.

Dialectic Problem Solving Processes

My greatest reflective learning arose from my response to the client conflict: how might I better understand the dialectic process demanded by the junior client? Following the workshop, I researched dialectic problem-solving approaches, and found only a few by name, including The Devil's Advocate, Dialectical Inquiry, and The Wright Stuff (https://www.ideaconnection.com/thinking-methods/dialectical-approaches-00027.html). These

dialectic approaches seem to require a special facilitation skill to maintain goodwill and keep the intentional competitiveness constructive, intervening if/when it turns destructive. Dialectic approaches also seem to require a significant amount of time, perhaps even multiple sessions with experiments and evaluations between workshops/debates.

Organizational Change

What was most interesting to me were the different personal interpretations of the same leadership behavior and words. For example, the CEO clearly desires innovation in the company, and has invested his time and company money in forums, training and business-wide assessments. Some of the HRLT members interpret this as permission and autonomy to initiate their own efforts to ignite innovation within the scope of their job description, without requesting further permission from top leadership. Other members interpret this as a small token by the CEO, but desiring more formal announcements and directives and permission to move forward with changes. Similarly, some group members seek to drive organizational change with top-down formalized process and communication; other members look to support small grass-roots innovations with increasing resources and structure as these innovations gain traction.

Additionally, I learned about the Human Resources team in the context of the current matrixed organization. There is uncertainty about functional boundaries, authority and influence. It appears the group desires to work as a team, but lack of group decision-making ability and communication gaps between group members affect team success.

Situational Outlook Questionnaire Applications

In hindsight, it would have been helpful to understand the climate for innovation much deeper into the organization – i.e. to apply the SOQ at more levels of the organization. This is where igniting innovation might have the most opportunity – middle management and below, a

deeper pool for ideas to erupt and be nurtured and implemented. The fact that management focused on management for the SOQ survey says a great deal about the traditional top-down culture that exists.

SECTION SIX: CONCLUSION

It has been said that difficult circumstances don't build character, they reveal it. Perhaps the same can be said for how difficult circumstances reveal creativity. For several years, my goal has been to develop my creative self-efficacy, with a subsequent goal to lead others to creative self-efficacy. Obviously, my personal creative development occurred through a variety of learning challenges, which have helped shape my creative character. However, the true extent of that character is starkly revealed in my response to creative challenges, and this project certainly had some big ones! This project – particularly the workshop delivery, had two significant challenges to resolve. I had anticipated and prepared for client and resource group challenges, although the extent of them was more than I expected. I also came to the workshop with enough facilitation experience to anticipate and prepare for pivoting. In fact, I had several alternative activities and techniques ready in case they were needed. What I did not anticipate was the severity of the disruption caused by the organizational announcement. Not only did it affect the clients and resource group, it also affects my future in ways I don't yet know. How could I guide a group through a creative change process while simultaneously managing my own uncertainties? This situation provided a crucible that would reveal how much of me was creative 'doing' and how much I am a creative 'being.' As such, most of what this project has revealed to me is who I am as a creative being. I possess the mindset and skills to clarify challenges and to accept them as what they are: problems seeking imaginative solutions. I am imaginative enough to find new solutions to those challenges, and I am persistent enough to develop and implement those solutions. I am optimistic enough to guide others through the challenges with humor and enthusiasm. I have the inner resolve to not only proceed in the face of uncertainty, but to search for joy in the procession. I am also more acutely aware that position and title

matter little to creative living; passion, awareness and enthusiasm matter greatly. Significant organizational change can be accomplished by a few passionate people who learn creative skills and enthusiastically put them into action.

If organizational change was easy, there would not be such demand and attention given to how can organizations become innovative. Yet this project has reinforced my understanding of how organizational change occurs: through the accumulation of personal changes. What I see myself doing next is quite simple yet very challenging: continuing to lead the organization towards creative self-efficacy, teaching tools and process, using measures to gain insight, and modeling the way. To continue my learning, I want to learn more about handling skeptics during workshops, as well as how to facilitate cross-culturally.

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Appendix A: Workbook contents

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Appendix B: Evaluation Summary

Workshop Dates:		2018							
Location:									
Facilitator: Phil Marks									
Scale:									
1 = "Strongly disagree", or the lowest, most negative impression.									
3 = "Neither agree nor disagree", or an adequate impression.									
5 = "Strongly agree", or the highest, most positive impression.									
Question	Mean	Mode	Range	# of 5's	# of 4's	# of 3's	# of 2's	# of 1's	
The workshop objectives were clear to me.	4.7	5	3-5	9	2	1	0	0	
The workshop content was relevant to my job.	4.9	5	4-5	11	1	0	0	0	
The workshop activities were appropriate.	4.8	5	3-5	10	1	1	0	0	
 The facilitator was knowledgeable about the subject. 	4.9	5	4-5	10	1	0	0	0	
The facilitator was well-prepared.	5.0	5	5	12	0	0	0	0	
The facilitator's style was effective.	4.8	5	3-5	11	0	1	0	0	
7. The workshop pace was appropriate.	4.5	5	3-5	8	2	2	0	0	
Overall, the workshop lived up to my expectations.	4.8	5	4-5	9	3	0	0	0	
Overall, the workshop was enjoyable to me.	4.7	5	4-5	8	4	0	0	0	
 I will be able to use what I experienced in this workshop. 	4.7	5	4-5	8	4	0	0	0	
11. I will be able to use the workshop outcomes (action plan).	4.3	4	3-5	5	5	2	0	0	
12. The SOQ helped me understand the FMPT innovation climate.	4.0	4	2-5	4	5	2	1	0	
13. The Individual Preparation presentation helped me prepare.	4.4	5	3-5	5	5	1	0	0	
14. The FourSight assessment and debrief were useful to me.	4.5	5	2-5	8	2	0	1	0	
15. I understand the Creative Problem Solving process.	4.8	5	4-5	9	2	0	0	0	

Workshop Da	es: April 9-11, 2018					
Location:	Exton, PA					
Facilitator:	Phil Marks					
Particip	nt What did you like about this workshop? What worked well for you?					
Α.	The presentation you gave during the HRLT call in advance was interesting and whet our appetites for the information to come. The steps are clear an once explained make total sense. It is a lengthy process, but a valuable one that you should make time for when you need to think creatively or are in a rut.					
В.	Method to streamline consensus around plans.					
C.	The process worked very well to come up with a realistic action plan. The process allowed for the participation of everybody in the team. The flow was very clear and the facilitator kept the attention and involvement of the group.					
D.	The climate and process for this workshop was excellent! It provided an effective, efficient way to collectively use our creativity to solve real, tangible problems, and it was fun!					
E.	Well structured, while giving enough space for debate / idea sharing.					
F.	Collaborative nature of problem solving working to narrow suggested solution.					
G.	Easy to understand process. Easy to be able to take and use the process in the future. Clear explanation and then put into practical action with exercises.					
Н.	Having a facilitator to keep us on track. Group focus on problem solving in person. A common experience and reference language to move forward.					
I.	The sharing of ideas and being forced to be quiet and wait turn to talk - hopefully promoted active listening by others.					
J.	A lot of generation of ideas - collective emulations. Rules and process well respected. Very respectful and enjoyable.					
K.	Interaction and developing action plans with colleagues.					
L.	Excellent facilitation! Well done, Phill Good program for moving from actual to desired status by generating an action plan in an effective manner.					

Workshop Date	s: April 9-11, 2018
Location:	Exton, PA
Facilitator:	Phil Marks
Participa	What would you change about this workshop? What concerns do you have?
Α.	Spend more time practicing POINt. It is a useful tool. Also some exercise that helps us concentrate on using the correct terminology so that we incorporate it more readily in our day to day lives.
В.	More "human factor" approach. Less cutting out of branches.
C.	
D.	My only concern is not with the workshop. It is to take and continue the work from our session and ensure we continue with our actions. We might need further facilitation!
E.	Execution / Implementation of the actions due to overriding priorities.
F.	No change - very useful
G.	Nothing. Good balance of education and practice to implement going forward. No concerns.
H.	Unable to sustain momentum long term.
1.	Nothing.
J.	Sometimes the feeling to turn around problems or to rediscover covered topics. Some repetitions. A strange feeling at the end to end up with "not so innovative" actions
K.	Wouldn't change anything about the workshop but am concerned group will lose momentum on action plans developed and we will fall into old habits or no change will occur.
L.	Too intense. Concentration level dropped at the end, where the most important decisions were made.

Workshop D	tes: April 9-11, 2018
Location:	Exton, PA
Facilitator:	Phil Marks
Partici	want What else? Any addition thoughts / comments / wishes?
	The games we played were brilliant ways to get everyone focused and relaxed after breaks. This was a tough group of personalities and a difficult time (during the acquisition announcement) and still we were productive. Bravo!
Е	Many interesting ideas, not sure they are living without a more accurate debate in the organization. We did not find the way to be heard.
(
	We need more "Phils"! Passionate about creativity and innovation to drive this through the organization. Great session! Love the process!
E	SOQ - We just got the assessment from a very small leadership group. It does not represent the climate / culture of the whole company. We should go deeper and wider with this process.
F	Phil was excellent! Well prepared, knowledgeable, open, firm but friendly.
0	Great job facilitating. You do a great job having us stick to the process and to do 'upshifting' activities to clear our mind and have us be in the "present." Thank you!
H	
	I was not present for the entire workshop. Loved the toys on the table. Glad that everyone participated willingly. Felt though that some voices were overwhelmingly heard - not sure though that this negatively impacted the outcome (so ok). Understanding how to approach things helped me see where I fall and also helped me understand why I was getting frustrated> I'm still learning to "respect the process."
	Phil, you are an excellent facilitator in front of a difficult group to facilitate with.
ļ	Thanks, Phil!
1	I have a feeling that we have lost some important aspects when deciding the topics for action plan.

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Philip E Marks

Ph & Much

Myay 13,2018

Date