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Prioritization & Workflow Management Birds Of A Feather Session

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The following is a revised protocol based on assessment of the birds of a feather session held as part of University Libraries Convocation, 11 August 2020. The session was held in response to staff concerns about prioritization and workflow management during the COVID-19 pandemic, and was held over Zoom.

This was a peer-led session that was not affiliated with any organizational prioritization efforts or budget conversations. It is recommended that anyone wishing to replicate the session consider the power dynamics between facilitator and attendee, and revise as necessary to best fit your organizational context.

Purpose:
Provide time and resources in order to enable staff to reflect on their workflows and consider what prioritization and workflow management tools might serve them

Outcomes:
Participants will:
- Identify successful elements and areas of opportunity in their own workflows
- Discuss ways to adapt and implement alternative tools and workflows, using experience and the provided resources as a guide
- Explore the Min Specs activity as a way to scope their work using the Principle of Good Enough

Materials:
- If held in person, provide paper and writing utensils.
- If held over Zoom, encourage attendees to bring paper and writing utensils, or open a blank document on their device.

Assessment:
- Observation of discussion
- Participant feedback

Session Pre-work:

This summer, we shared a survey to ask how we might be able to support you in the next few months, whether you'll be continuing remote work or returning to campus. Two of the most popular topics were prioritizing tasks and time/workflow management.

Prioritization and workflow management are very challenging right now. While everyone's circumstances will be different, this session will give us the opportunity to come together to reflect on what's working, consider alternative approaches, and brainstorm ideas for implementation. Please complete the pre-reading and reflection before the session to enrich our discussion.

Read (or watch) one or two of the following:

Caitlin Bishop, "How to prioritize work when everything's important" .
https://www.wework.com/ideas/worklife/how-to-prioritize-work
- ~1200 words
- Provides 7 simple methods for prioritizing your work

Mary Halton, "Multiply your time by asking 4 questions about the stuff on your to-do list".
https://ideas.ted.com/multiply-your-time-by-asking-4-questions-about-the-stuff-on-your-to-do-list/
- ~800 words, or a 20min video (see bottom of the linked page)
- Provides a simple framework for trimming your to-do list

Jory MacKay, "The "Everything is Important" paradox: 9 practical methods for how to prioritize your work (and time)". https://blog.rescuetime.com/how-to-prioritize#master-list
- ~2500 words
- Offers 8 simple methods for prioritizing your work
- Note: this blog post is promoting a paid product (the 9th tool in the list)

Duncan Muguku, "20 Tips on How to Prioritize Work and Meet Deadlines".
https://www.thriveyard.com/20-tips-on-how-to-prioritize-work-and-meet-deadlines/
- ~5800 words
- Provides 20 methods, ranging from prioritization to asking for help

Ratnapalan, S., & Batty, H. (2009). To be good enough. *Canadian family physician Medecin de famille canadien*, *55*(3), 239–242. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2654842/
- ~1000 words
- Outlines the Principle of Good Enough in the medical context

Reflect on the following questions:
1. What parts of your process or workflow did you have to change with the shift to a new working environment this spring?
2. What parts of your new workflow are working well? What parts could be improved / what kinds of challenges have you been experiencing?
3. What tools and processes from these articles sound promising? How might they address the challenges you identified? How might you need to modify the tools and processes to make them fit your own needs?

4. What additional support do you want or need from your supervisor and colleagues?

While you are welcome to share with the group any challenges you've faced in your own workflow, it is not required. These questions are for reflection only.

Be ready to discuss:
1. What time/workflow management and prioritization tools have you been using so far this summer? What's working well for you?
2. What tools and processes from these articles sound promising?
3. How might you incorporate them into your workflow? How might you need to modify the tools and processes to make them fit your own needs?
4. How can we support each other in our efforts to prioritize tasks and optimize our workflows?

Session Introduction:

Good afternoon! I'm so excited to have all of you here.

As I mentioned in the pre-work document, this session is really coming out of feedback we've been receiving throughout the pandemic about the difficulties of managing workflows and prioritizing tasks under the current circumstances. And I do really want to acknowledge that those difficulties are very real, and that finding a successful workflow can feel like a moving target -- especially right now, as many of us are gearing up to go back to campus at least part time.

With that in mind, this conversation is going to be very informal -- we will likely have read very different articles depending on our interests, and we also have very different existing strategies and experiences. This hour is really just a time for us to learn from one another.

So, as a reminder, I asked you to mull over a few questions before the session. They were:

1. What tools and processes have you been using so far? What's working well for you?
2. What from these articles sound promising to you?
3. How might you incorporate those ideas into your own workflow? How might you need to modify the tools and processes to make them fit your own needs?
4. How can we support each other as we try out workflow changes?

We don't have to go through them in order, but they're there if anyone would like that additional structure.

With all of that said, I yield the floor to whoever would like to share! I'll keep a general eye out for chat and raised hands, but please also feel free to unmute and chime in as you feel moved.

Discussion Tips:

- As appropriate, complete the reflection exercise yourself in advance of the workshop. Use your answers to develop followup questions. For example:
    - "One challenge that I encountered was _____. How do you think I might resolve it?"
    - "One tool I found particularly interesting in the reading was _____, because _____. I'm considering using it to _____. How might you use a similar tool?"
- For groups that thrive on structure, consider asking the discussion questions individually rather than opening the conversation to all topics simultaneously.

Optional Activity: My Min Specs

Min Specs was included on the pre-reading resource list for the original session. This separate activity was developed after the session due to attendee interest and the fact that this tool would require substantial adaptation for individual use.

Min Specs is an activity from Liberating Structures that helps a group identify the minimum requirements for success in a particular project.

The goal of this activity is to create a personalized version of Min Specs that you can use to scope and prioritize your own projects -- Your Min Specs.

1. This tool can be used to prioritize projects in your workload, or to help scope a particular project to make it more attainable. Take a moment to reflect: which of these tasks do you find more challenging?
    a. Identify a specific example to work with today. For example, is there a particular project you're struggling with? Are there elements of your current workload that are difficult to prioritize, or have there been times in the past when you've struggled to prioritize a selection of projects?
2. Read:
    McCandless, K. & Lipmanowicz, H. (n.d.) *Min Specs*. Liberating Structures. Retrieved from http://www.liberatingstructures.com/14-min-specs/.
    This article is ~900 words.
    a. When you're done reading, answer the following questions: [~5min]
        i. How can you apply this process to your example situation?
        ii. What changes might you need to make to the process to make it work for you?
        iii. What structures might you need to build for yourself to make it work for you?
            1. For example:
                a. What questions might you ask yourself as you go through the process?

   b. What factors might you consider as you determine what is a Min Spec?

   c. How might you engage your colleagues and/or supervisor in the process of developing Your Min Specs?

3. Discuss with a partner: [~5min]

   a. Which kind of example were each of you working with (prioritization or scope)?

   b. What changes did you make?

   c. What structures did you identify?

   d. What challenges did you encounter? What suggestions can you offer your partner?