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# **The Bubble Sheet – A Flexible Action Planning Tool**

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**Wholonomy Consulting**

**[www.wholonomyconsulting.com](http://www.wholonomyconsulting.com)**

## Foreword

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We have developed this flexible action planning tool to support individuals and groups in setting goals and developing action plans. We are grateful for the opportunity to work collaboratively with many early childhood professionals in Arizona in the pilot testing and modification of these materials.

### About Us:

Cassandra O’Neill, MA [cassandraoneill@comcast.net](mailto:cassandraoneill@comcast.net) or 520 403-0687

Sarah Griffiths, MFA [slmgriffiths@hotmail.com](mailto:slmgriffiths@hotmail.com) or 520 271-7970

**Ms. O’Neill** applies strengths based approaches to change in her work with individuals and groups. She is passionate about activating positivity, building resiliency, and creating conditions for authentic learning. She blends her experience working in large systems, her experience teaching and using coaching skills, and her knowledge of the brain research and learning. Each one of us is born loving to learn and is an expert in the creative process. Ms. O’Neill helps individuals and groups rediscover their creativity, love of learning, and intuitive voice.

**Ms. Griffiths** applies strengths based approaches to change, whether the change is at the individual, organizational, collaboration or system levels. She helps to create processes and conditions for supporting change, and blends her knowledge of brain research, coaching and best practices in systems change with whole system methods, such as Appreciative Inquiry, World Café and Open Space Technology. All of us can change and grow. Ms. Griffiths, once a teacher, now brings the lens of learning to focus on creating positive change.

## Introduction

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People are frequently asked to develop goals and action plans in their work in the social sector. There are many different versions of action planning forms, however, there are common elements such as goals, objectives, outcomes, and action steps.

If action forms are used in a linear way, it can be difficult for people to generate meaningful ideas. We created this thinking tool to help people brainstorm multiple ideas and then select the ones that they want to experiment with. One of the interesting things we found in developing this tool is that the order of the questions matters a great deal. In our earlier versions, we had the goal first, and the outcome second. While it makes logical sense to list a goal and outcome before you start developing action steps, people told us that trying to think of an outcome so early in the process stopped their thinking completely. Moving the outcome to the end of the brainstorming process made it much easier for them.

As we thought about this, it made a lot of sense because our brains don't think in metrics. We think in images. By sequencing questions in a way that supports thinking, the earlier questions and answers prompted thinking that naturally led to images of what the end result or outcome would look like.

The thing that often happens in action planning processes that involve filling out forms in a linear way, is that plans get developed – but often these plans don't build on existing strengths or really get at the actions that would move a person or organization from where they are to where they want to be. We found that by asking people the series of questions in the Bubble Sheet in the sequence presented, and then asking people to loop back and connect the information, new ideas emerged. And we found that these new ideas were often more likely to lead to the desired change or outcome.

One other significant benefit of this thinking process is that you don't end up selecting the first ideas generated. The first ideas aren't often the best. Engaging in a process that requires deeper thinking and new ideas can be simple with this action planning tool.

# The Brainstorming Bubble Sheet

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Name of person/group brainstorming:

Date:

What do you want to brainstorm about?

**1.** What result do you want to see? (**Broad Goal**)

**2.** What are 3 possible causes of what is happening now (the condition you want to change)?

**3.** What strengths can you build on to create the change you want to see (both your personal strengths and the strengths of the organization)?

**4.** What are possible action steps/strategies that could be put in place to create the change you want? Please think of at least 10 ideas (use other paper)

**5.** What challenges do you expect in trying out these new ideas?

**6.** What would help you make the changes you want to see?

**7.** After completing steps 1-6 – go back and add any new ideas to # 4 – the action steps. Do these build on strengths? Do they get at all the reasons why you might not be seeing the result you want? Do they lead to the change you want? Brainstorm some more – then when you can't think of anything else pick a few you want to try, and answer the question in step 8.

**8.** When the changes are made, when the goal is achieved, what do you see? What is happening?

## Bubble Sheet Action Planning Tool Instructions

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This action planning tool has been nicknamed the “Bubble Sheet” because of the circles. The purpose of the tool is to help individuals and groups brainstorm multiple ideas for action, and then select ideas from a large list.

The questions are designed to help people think of ideas that go beyond the first response. This tool contains a series of questions that when answered, help generate meaningful ideas and action plans. We like the nickname the Bubble Sheet, because when it is used it helps to facilitate a thought process that encourages new ideas and connections to “bubble” to the surface.

The Bubble Sheet has been designed to help people and groups have conversations and meetings that generate meaningful action plans. This tool:

- Can be used one-on-one or with groups.
- Can be used to support the development of goals or action plans.
- Is brain-friendly and flexible.
- Allows for the generation of multiple ideas before a final selection is made, and we encourage people to think of as many items as possible at each step of the way.
- Is generative and supports thinking.
- Engages the participant(s) in reflection and focuses attention on using existing strengths.
- Encourages self-direction and the development of goals or plans that the participant feels capable of succeeding at and has the resources available to support them.
- Can be used by an outside consultant/coach/facilitator or alone, as a thinking tool.

### Here’s how to use it:

The first step is to complete the steps in numerical order. However, be responsive to the thinking process, if people want to brainstorm in a different order that is fine, the tool can be used flexibly.

1. **Step 1:** What result do you want to see? (**A Broad Goal**):
  - The first step of the Bubble Sheet is to craft a broad goal, so that there can be multiple ideas generated toward a wide goal. We don’t want to think very narrowly from the start as it limits thinking. A possible example of a broad goal could be to increase something. We have used this tool with Quality First coaches to brainstorm how to increase Developmentally Appropriate Practice in early childhood programs. These coaches have used this tool with teachers to brainstorm how to increase reading, outdoor activity, and other classroom elements that lead to higher quality education. Another example of a broad goal could be to increase the effectiveness of meetings. Starting with a broad goal helps the people come up with multiple ideas about how to get there.
2. **Step 2:** What are three possible causes of what is happening now (the condition you want to change)?
  - In order to initiate change, we need to understand some possible causes of why something is the way it is. This helps to tie goals and actions to reality, and to distinguish between causes that we can influence and those we cannot. Again, we encourage people to think broadly. When people start action planning without looking at what is going on, they may come up with ideas that make logical sense, but won’t actually lead to change. For example, if you developed a goal of increasing reading time in an early childhood program, a logical plan might be to buy more books. However, it could be that there are books in the program, but they aren’t being used. Books might not be used because the staff doesn’t know how to read them to children or

may not feel comfortable reading them. Or the books might not be the right age level or language. Buying more books would therefore not necessarily lead to change in this situation.

3. **Step 3:** What strengths can you build on to create the change you want to see (both your personal strengths and the strengths of the organization)?
  - The most successful accelerator of change is building on something that already exists. By asking people to think of strengths that they could direct to creating change, this process often reveals existing assets and strengths that were not previously considered.
4. **Step 4:** What are possible action steps/strategies that could be put in place to create the change you want? Please think of at least 10 ideas—you'll probably need to use other paper.
  - At this point in the sequence we ask people to brainstorm as many possible action steps/strategies as they can. The trick is not to judge them. This is not a weeding exercise, but a time to put everything down on paper without judgment.
5. **Step 5:** What challenges do you expect in trying out new ideas?
  - This is an invitation to adjust and think through barriers before making a commitment to action steps that won't work.
6. **Step 6:** What would help you make the changes you want to see?
  - This step invites the person or group brainstorming to consider any support they might need after thinking about potential barriers they make encounter.
7. **Step 7:** Complete steps 1-6. After completing steps 1-6 – go back and review all the information and add any new ideas to # 4 – the action steps. Do the ideas for action steps build on strengths? Do they lead to the change you want? Look at the multiple reasons that change isn't happening, do the ideas for action address all the reasons the change isn't happening yet?
  - Brainstorm some more making sure the action steps build on strengths, address the multiple causes, and lead to the change you want. When you can't think of anything else pick a few ideas or action steps that you want to try or experiment with.
8. **Step 8:** Imagine the changes have been made; the goal is achieved. What do you see? What is happening? This information will help you be clear on what the change will look like. If you want to craft a more specific goal with SMART elements, now is the time to do it. Or you can create a destination postcard once you're clear on what the change will look like. (See Attachment 1 for more information on SMART Goals and destination postcards.)

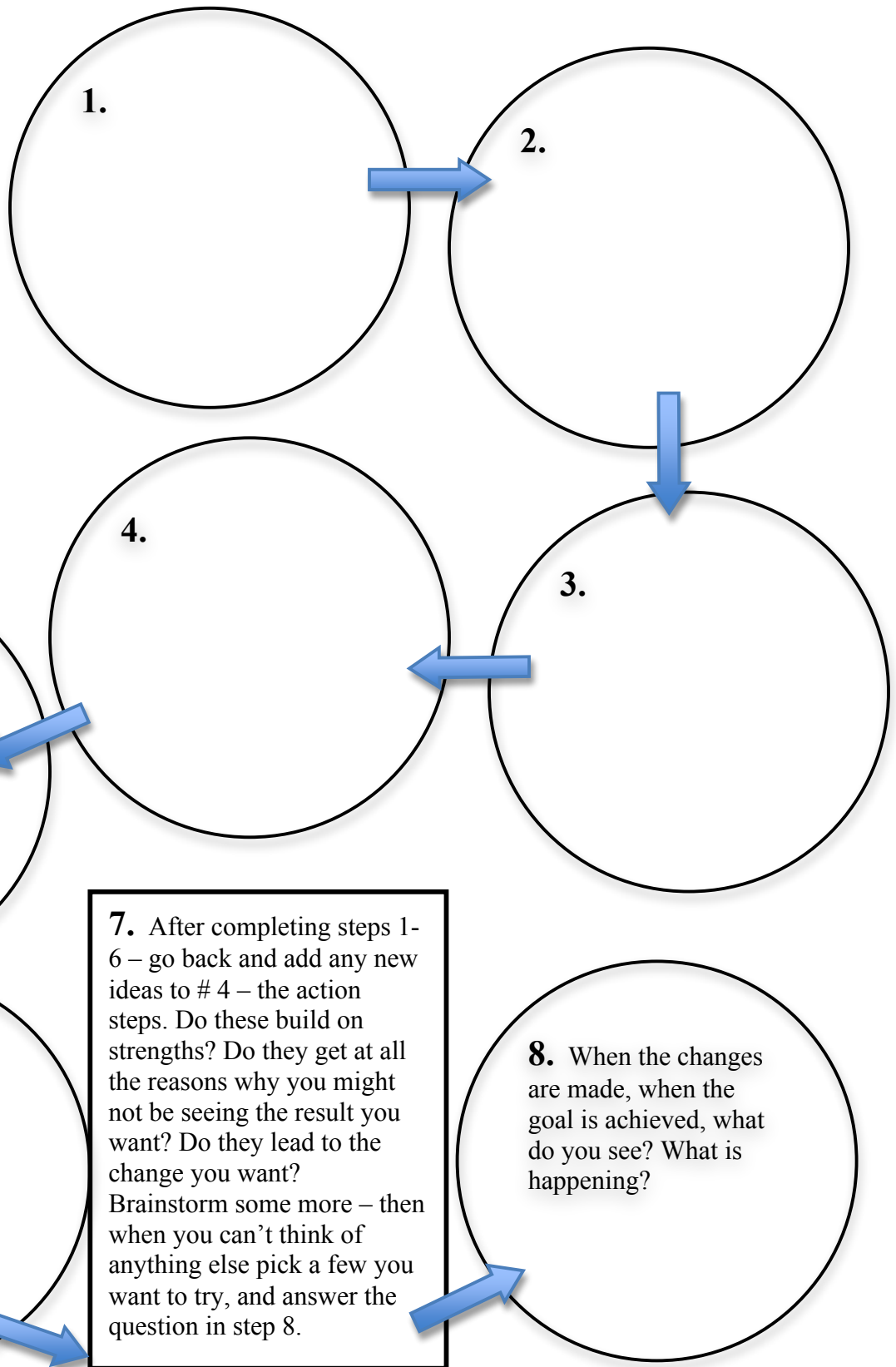
## The Brainstorming Bubble Sheet (answer format)

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Name of person/group brainstorming:

Date:

What do you want to brainstorm about?



## The Brainstorming Bubble Sheet – Narrative Form

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Name of person/group brainstorming:

Date:

What do you want to brainstorm about?

Questions to think explore:

1. What result do you want to see? What would you like to see? (Broad Goal)
2. What are three possible causes of what is happening now (the condition you want to change)?
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3. What strengths can you build on to create the change you want to see (both your personal strengths and the strengths of the organization)?
4. What are possible action steps/strategies that could be put in place to create the change you want? Please think of 10-15 ideas.



## Continued action steps...

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5. What challenges do you expect in trying out these new ideas?
  
6. What would help you make the changes you want to see?
  
7. Step 7: After completing steps 1-6 – go back and review all the information and add any new ideas to # 4 – the action steps. Do the ideas for action steps build on strengths? Do they lead to the change you want? Look at the multiple reasons that change isn't happening, do the ideas for action address all the reasons the change isn't happening yet? Brainstorm some more ideas making sure the action steps build on strengths, address the multiple causes, and lead to the change you want. When you can't think of anything else pick a few ideas or action steps that you want to try or experiment with.

Ideas to try:

8. When the changes are made, when the goal is achieved, what do you see? What is happening? (This information will help you craft a more specific goal with SMART elements, if you would like to, or a Destination Postcard, which is described in the book Switch: Switch: How to Change Things When Change Is Hard by Chip Heath and Dan Heath<sup>1</sup>. (See Attachment 1 for more information on SMART Goals and destination postcards.)

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<sup>1</sup> Heath, C., & Heath, D. (2010). Switch: How to Change Things When Change Is Hard (1<sup>st</sup> ed.). Crown Business.

## **Attachment 1 – More information on SMART Goals and Destination Postcards**

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We use the following information from the book Switch: How to Change Things When Change Is Hard by Dan and Chip Heath (SWITCH) when helping groups think about different types of goals<sup>2</sup>.

- 1.) Destination Postcards**—A type of goal described in SWITCH is called a destination postcard. The destination postcard is a phrase that captures the change you want. Destination postcards work to align our emotions and our head. Several examples of these types of goals are described in SWITCH. One example describes a goal set by a first grade teacher when working with her students. She motivated them to change with this goal: By the end of the year, they would all be 3rd Graders (skill wise). Another example from SWITCH is of a new breast cancer clinic with the destination postcard “Under One Roof.” Local, AZ, examples include the following: an organization that develops leadership of young professionals developed a destination postcard of “Tomorrow’s Leaders Ready Today.” Another example is from a group working on a park in Phoenix; they want this park to be to Phoenix what Central Park is to New York City. Their destination postcard is “The Central Park of Phoenix.”
- 2.) SMART Goals**—Specific: the what, how and why; Measurable: if you can’t measure it, you won’t know if you’ve changed it; Attainable: goals which are set way beyond reach probably won’t happen; Realistic: do-able; Timely: with a clear time-target.

In SWITCH, the Heath brothers talk about the difference between how people think change happens and how change actually happens.

**How people think change happens—ANALYZE- THINK-CHANGE**

**How change actually happens—SEE-FEEL-CHANGE**

The Heath brothers say that when you want to create a big change that you need emotion and clarity. The destination postcard generates emotion and clarity; a SMART Goal does not. A SMART Goal presumes emotion. SMART Goals lack emotional resonance, and they don’t generate emotion. “The specificity of SMART goals is a great cure for the worst sins of goal setting – ambiguity and irrelevance” (“We are going to delight our customers every day in every way!”) (Heath and Heath, 2010, p. 82)




They continue, “SMART goals are better for steady-state situations than for change situations, because the assumptions underlying them are that the goals are worthwhile and meaningful. If you accept that generating 4,500 leads for the sales force is a great use of your time, the SMART goal will be effective. But if a new boss, pushing a new direction, assigns you the 4,500-leads goal even though you’ve never handled lead generation before, then there might be trouble” (Heath and Heath, 2010, p. 82).

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<sup>2</sup> Heath, C., & Heath, D. (2010). Switch: How to Change Things When Change Is Hard (1<sup>st</sup> ed.). New York: Crown Publishing Group.

## Attachment 2 – Three types of Issues – Simple, Complicated, and Complex --Different Types of Issues Require Different Kinds of Goals

We often use this handout when working with groups. The following information is from a book called Developmental Evaluation by Michael Quinn Patton<sup>3</sup>. He describes three different types of issues, which lend themselves to different types of goals and approaches. A simple issue lends itself to a SMART Goal, while a complex goal is a better fit with a destination postcard.

<p style="text-align: center;"><b>Simple:</b> <b>Baking a cake</b></p> 	<p style="text-align: center;"><b>Complicated:</b> <b>Sending a rocket into space</b></p> 	<p style="text-align: center;"><b>Complex:</b> <b>Raising a child</b></p> 
<ul style="list-style-type: none"> <li>• Following a recipe.</li> <li>• The recipe is essential.</li> <li>• Recipes are tested to assure easy replication.</li> <li>• No particular expertise is required, but cooking expertise increases the likelihood of success.</li> <li>• A good recipe produces nearly the same cake every time.</li> <li>• The best recipes give good results every time.</li> <li>• A good recipe specifies the quantity and nature of the elements needed and the order in which to combine them, but there is room for experimentation.</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed protocols or formulae are critical and necessary.</li> <li>• Sending one rocket to the Moon increases the likelihood that the next will be a success, but success is never guaranteed.</li> <li>• High levels of expertise and training in a variety of fields are necessary for success.</li> <li>• Key elements of each rocket must be the same to succeed.</li> <li>• Success depends on a blueprint that both directs the development of separate parts and specifies the exact relationship in which to assemble them.</li> <li>• There is a high degree of certainty of outcome if everything comes together in the right way, but also many places where things can go wrong.</li> </ul>	<ul style="list-style-type: none"> <li>• Highly prescriptive protocols have limited relevance or are counterproductive.</li> <li>• Raising one child provides experience but is no guarantee of success with the next child.</li> <li>• Expertise helps but only when balanced with responsiveness to the particular child.</li> <li>• Every child is unique and must be understood as an individual.</li> <li>• Outcomes vary by child and remain uncertain over time.</li> <li>• Can't separate the parts from the whole; essence exists in the relationship between different people, different experiences, different moments in time.</li> </ul>

<sup>3</sup> Quinn Patton, M. (2010). Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use. New York: The Guilford Press.