

## **The Structured Debrief Approach – a resource for Pro Bono OR volunteers**

### **Origins of the term 'Structured Debrief'**

The term 'structured debrief' was coined by John Arney, founder director of the Centre for Structured Debriefing, circa 1994. For further information contact the Centre for Structured Debriefing Ltd ([www.structured-debriefing.co.uk](http://www.structured-debriefing.co.uk)). Two case studies for Pro Bono OR projects where this approach was used to some degree are identified below.

### **Outline of the Approach**

The Structured Debrief approach provides a 'common sense' top-down methodology beginning with an initial understanding of the system or problem of interest derived after initial consultation with the client. Essentially, a structured debrief is a facilitated discussion involving relevant knowledge holders or stakeholders who are guided through the following stages:

- **Introduction:** What is the system or problem of interest and what is the focus of the debrief process.
- **Review:** The facilitator provides a verbal description of, or visual aid describing, the system or problem of interest which is intended to serve as a prompt for the subsequent structured discussions.
- **Ponder:** The facilitator prompts with a series of questions designed to get each participant to reflect on the problem/system of interest with a view to them identifying and being prepared to share personal views and experiences.
- **Sharing & Discussion:** Participants share views on the current situation during the facilitator-led discussion. Views are captured by the facilitator and verified interactively as required with the participants. When appropriate, having assessed the current situation, desired position(s) or options can also be distilled with a view to identifying pathways for change, potential projects and relative priorities.
- **Summary:** The facilitator summarises the main points identified and, where necessary, updates the initial understanding/model of the problem/system of interest.
- **Closure:** Working with the participants the facilitator identifies any outstanding issues and proposals for how these may be addressed. Agreement is obtained on what products will be generated as a result of the debrief, and actions assigned.

### **Application**

The Structured Debrief approach provides a very flexible and adaptable methodology that can be used either directly with individuals or, preferably, with groups of individuals engaging 6-10 participants, from all areas and levels in the problem owning organisation.

Workshops and one-to-one meetings should normally be conducted face-to-face (which would always be preferable); however, the process could be facilitated via online meetings, or similar, if required.

The two case studies listed below show how the approach has been applied to progress Pro Bono OR projects.

An abbreviated Structured Debrief approach could be of assistance when project scoping and when carrying out post-project evaluations with one-to-one debriefs being undertaken respectively with project sponsors and project officers.

### **Case Studies**

The following case studies are included in this resource to demonstrate the structured debrief approach.

#### **Pro Bono OR Project: RFSA Foundation Case Study Report**

As published in Inside OR, Issue No 582, June 2019.

#### **The Client**

The RFSA Foundation is a charity currently providing grants for students and arts outreach programmes through nine academic institutions in the Greater London area, with the objective of widening access to arts education within the region. Essentially, access to the arts, design and associated professions is broadened by supporting those who might otherwise be unable to start or stay in relevant further and higher education within Greater London. Beneficiaries may be suffering disadvantage because of financial hardship, physical or mental disability, or by having care responsibilities.

#### **The Problem**

The problem to be addressed is the creation of a new mission statement and strategy for the future of the charity, to enable the organisation to focus its resources more effectively and efficiently.

#### **The Approach**

The Pro Bono OR volunteer facilitated a strategy workshop for members of the Foundation's Board of Trustees, held on 29 October, 2018. The facilitator began by outlining the strategic planning process, reviewing the current business model, and helping the group to distil a mission statement for the Foundation. This was followed by a structured debrief on current operations and SWOT (strengths, weaknesses, opportunities and threats) analysis. The group then went on to generate a vision statement and identify the relevant components of a strategic plan before deriving a prioritised list of actions for taking things forward, including the assignment of actions and target completion dates.

#### **The Solution**

The OR Society volunteer produced a Facilitators Notes and Observations Report to assist the Foundation with work to take things forward. The Foundation then used this document and other outputs generated during the course of the strategy workshop (mainly flip charts) to produce a Strategy document and accompanying Strategic Plan 2019-2024.

#### **The Benefits for the RFSA Foundation**

The RFSA Foundation now has a strategy and strategic plan that has been derived in a collaborative way by members of the Board of Trustees. This should enable work to proceed to deliver the desired outcomes, that is, more effective and efficient services to the beneficiary community over the timescale of the strategic plan.

## **Pro Bono OR Project: Humraaz Case Study Report**

February 2020

### **The Client**

Humraaz provides safe refuge and specialist support services for black and ethnic minority women and their children who have suffered or are at risk of suffering domestic abuse, honour based violence and/or forced marriage.

### **The Client's Problem**

In view of increasing demand for Humraaz's services the organisation requested assistance with the facilitation of a strategy workshop, the products of which would be used to develop an organisation strategy and strategic plan.

### **The Approach**

Essentially, during the facilitated strategy workshop, the strategic planning process was outlined and the likely scope of a strategic plan was described schematically. A high-level schematic of Humraaz's main operations, derived beforehand by the facilitator, was presented and this was used as a prompt for thinking about the components of interest in the Humraaz operating model. Also, an unpopulated tableau showing the main components of a typical business model was used to distil the main features of the Humraaz business model and the outputs of this exercise were documented.

Following this, the main features of both Mission and Vision Statements were described. These are considered to be fundamental to the subsequent distillation of both a 'Strategy' document and of a 'Strategic Plan'. The derivations of Mission and Vision statements were carried out interactively, subject to some debate under the supervision of the facilitator. Finally, a 'Structured Debrief' exercise was undertaken to gain a collective perspective on the main problems and issues facing the organisation.

### **Solution**

- Facilitated workshop involving Board members, management, paid staff and key volunteers.
- Key outputs were outline mission and vision statements.
- The structured debrief provided a collective understanding of the organisation's main challenges and solution options.
- Work is ongoing within Humraaz to further refine the mission and vision statements prior to formulating a strategy document and strategic plan.

### **The Benefits**

- In terms of helping Humraaz to map out a way forward, all of the main issues facing the organisation seem to have been identified.
- Eleven participants were drawn from across the organisation and all participated energetically to help distil a comprehensive picture of Humraaz operations and facilitating a collective understanding with a high level of ownership.
- Having an 'outsider' facilitate the process, being prepared to challenge and seek clarification where appropriate was considered to enhance the value of the workshop
- The facilitator has agreed to continue supporting Humraaz with the ongoing development of a strategy and strategic plan, as and when required. This may lead to additional Pro Bono OR input.

**The System of Interest**

