

CHA/CHIP Demonstration Project Webinar #1

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Facilitating Meetings of Diverse Groups of People

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NACCHO CHA/CHIP COLLABORATIVE WEBINAR
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Objectives

- Identify at least three key components of planning & designing community meetings & workgroups
- State two of the primary responsibilities of the meeting facilitator
- List two techniques for increasing participation
- Describe modified consensus decision making
- Name three group facilitation “dos” and three group facilitation “don’ts”.
- Name specific points in the CHA/CHIP process where facilitation is valuable



Diversity in Participants

- The *Community Health Assessment and Health Improvement Processes* have a larger focus than the public health agency, and will involve stakeholders and partners in the assessment, planning, and development process, as well as in implementation of activities.



Group Wisdom

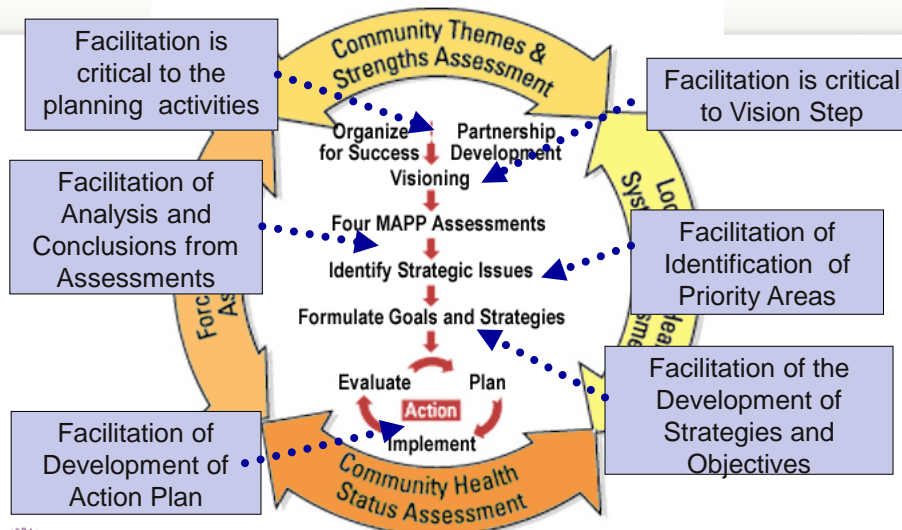
- What makes a team more intelligent has more to do with the group's interactions.
- More **equal participation** and greater **social sensitivity** on the part of its members are the key factors in predicting a group's intelligence, according to the study, published online in September 2010 by the journal *Science*.

Here's the question...can YOU influence this?

Courtesy of Wendy Fraser, Fraser Consulting, LLC



Facilitating Health Improvement Process



Questions to Answer

- Who do you want in the room?
 - Balance of stakeholders, constituents, partners
- What resources do you have?
 - Funding, in-kind contributions, volunteers, community contacts, existing programs
- Who else can you get to help?
 - Partners and allies, new relationships within community
- What is your outreach strategy?
 - Track efforts carefully, adjust strategy & recruitment efforts as needed
- How/who will manage logistics & outreach efforts?



Designing the Meeting

Determine what's IN & what's OUT

- Clearly define the purpose of the work group and each meeting and its desired impact
 - Educating stakeholders
 - Discussing questions to generate desired options
 - Responding to presented options to revise, add to & rank
- Select Topic Areas
 - Break the issues(s) into manageable pieces
 - Present data, relevant research, best practices
 - Don't try to more than you have time to do! More is not necessarily better.



Developing Meeting Content

- Develop content
 - Who- the Chair/leader, facilitator, subgroup, or designated partners?
- Design meeting agenda & prepare materials
 - Facilitator Guide/notes
 - Determine key messages & meeting objectives



Teams v. Work Groups

Teams

- Individual & shared accountability
- Team seen as interdependent “social entity”
- Shared common goals
- Shared responsibility for outcomes
- Teams a type of group

Work groups

- Share information & make decisions that support individual work assignments
- Maintain individual work goals
- Maintain individual responsibility & accountability



Workgroup Characteristics

When you think about the best work group you've been part of, or observed, what were the characteristics that made the work group so great?



Proposed Ground Rules

- Start and end on time
- No side-bar conversations
- Come prepared and to contribute
- Listen
 - Be open to hearing other people's perspectives
 - Question assumptions
- Honor the group
- Be honest
- Be respectful

Create a safe environment



Responsibilities of the Facilitator

- The facilitator should not be the Chair/leader of the work group.
- The facilitator assists the Chair/leader in planning the meeting and create the meeting agenda and materials
- S/he is responsible for keeping the meeting focused and moving through the agenda.
- S/he may also document some of the key decisions by writing key points on a flipchart or whiteboard as the discussion unfolds so that everyone can see them, but should not be the scribe if keeping detailed notes.



Responsibilities of the Facilitator

- Room set-up
- Agenda and materials
- Open the meeting
- Review the agenda and ground rules
- Make sure someone is taking notes
- Make sure someone is keeping track of time
- Keep the team focused on the agenda
- Establish and maintain an appropriate meeting pace
- Facilitate discussions, actions and follow through
- Encourage and manage participation
- Help the team with decision making
- Guide the team's meeting evaluation
- Gather suggestions for the next meeting's agenda
- Close the meeting



Additional Meeting Roles

Note taker

- Capture the key points of the each agenda item
- Highlight decisions made and action items
- Collect future agenda items
- See that the minutes are distributed or posted

Timekeeper

- This is sometimes done by the meeting leader.
- The key responsibilities include:
 - Keep track of time
 - Alert the team when the allotted time for a time is nearly exceeded



Meeting Management

Pre-Planning: Weeks in advance

- Logistics: room scheduling, A/V if needed
- If refreshments are to be served, check to be sure they are ordered
- Complete the meeting agenda
- Send out meeting reminder & agenda; ask members to accept/decline meeting
- Check in with any invited guests, speakers, verify the time they are on agenda and any needed equipment.



Preparing for Meetings

Pre-planning: Three days in advance

- Make copies of all materials needed for the meeting
- Respond to email replies/messages from council members
- Prepare any notes, talking points for your presentation(s)
- Gather supplies: Flip chart & easel board, markers, tape, post-it notes, etc.

Day of Meeting

- Arrive at meeting room 15-30 minutes early to arrange tables and chairs, materials, etc.
- Bring supplies; refreshments (as appropriate)



Follow-up from Meetings

Day(s) after Meeting

- Ensure that meeting minutes are typed and reviewed for distribution
- Create action item list for distribution
- File all materials from past meeting
- Track and follow-up on action item list and agreements (who, what, by when)
- Maintain historical file of meeting agendas, minutes and other documents/materials
- Send out minutes to distribution list & post online

Ongoing

- Communicate with key stakeholders between meetings
- Communicate/meet with community partners as needed



SKILLS FOR FACILITATING MEETINGS

ACTIVE LISTENING,
UNDERSTANDING THE LADDER OF
INFERENCE, DEALING WITH
COVERT ISSUES AND DECISION
MAKING PROCESSES



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Active Listening Do's

- Hear the speaker out.
- Use non-verbal cues to show you are involved in what the speaker is saying.
- Provide feedback, paraphrasing or summarizing to check that you understood the message as intended by the speaker.



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Active Listening Do's

- Suspend judgment about what the speaker said.
- Listen for feelings as well as content. Ask relevant follow up or clarifying questions.
- Show empathy.
- Learn to be comfortable with silence.



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Active Listening Don'ts

- Don't criticize or judge.
- Don't give advice.
- Don't be overly optimistic or humorous.
- Don't play detective.
- Don't play psychologist.
- Don't make or share your assessment of what is being shared.
- Don't try to solve the problem.



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Inclusion – Ensure **All** Voices are Heard

Many ways to gather feedback and generate dialogue

- Make it safe
- Whenever possible, partner people from different groups (e.g. organization, sector, occupation)
- Size: individual, pairs, small groups, large groups
 - Manage airtime (who gets to speak and how much matters)
 - Call on certain people or groups if needed



Encouraging Participation

What activities have you used to increase participation? How has active listening and creating a safe environment helped encourage participation?



Intent V. Impact

“We Judge Ourselves By Our Intent...
We Judge Others By Their Impact”

Paraphrase of John Wallen



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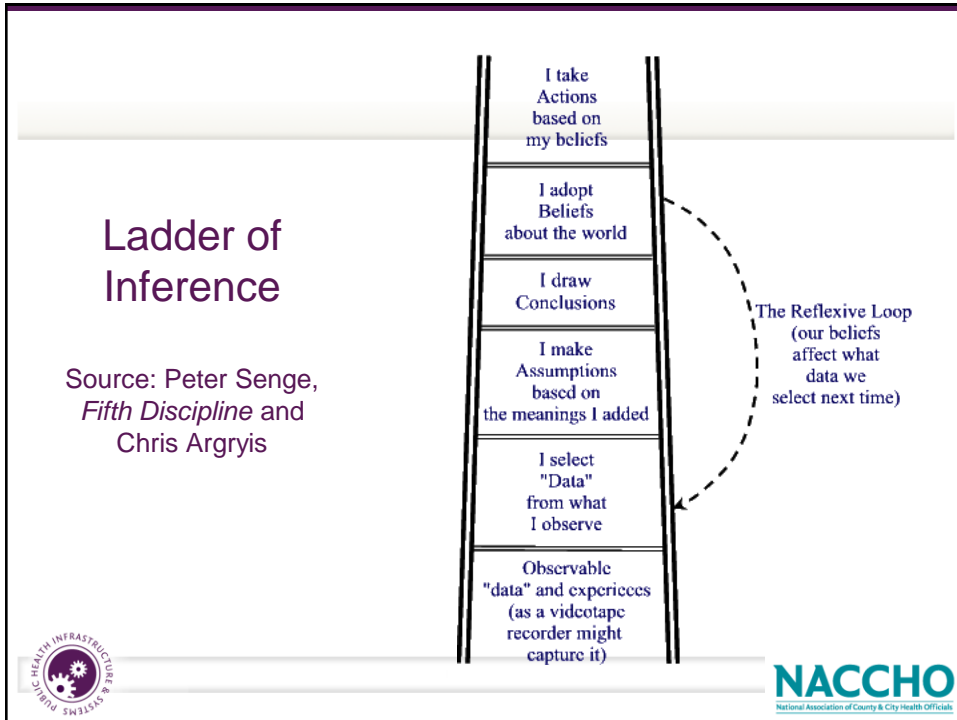
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Uncover and Test Assumptions

- Talk to others
- Reflect
- Tools like “5 Why’s”
- Ladder of Inference (Senge, Argyris)
- Create tests or simulations



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Ladder of Inference

- 1) We take **Observable "data"** and experiences - as if a videotape recorder might capture it
- 2) I select "**Data**" from what I observe
- 3) I add **meanings** (cultural and personal)
- 4) I make **assumptions** based on the meanings I added
- 5) I draw **conclusions**
- 6) I adopt **beliefs** about the world
- 7) I take **actions** based on my beliefs

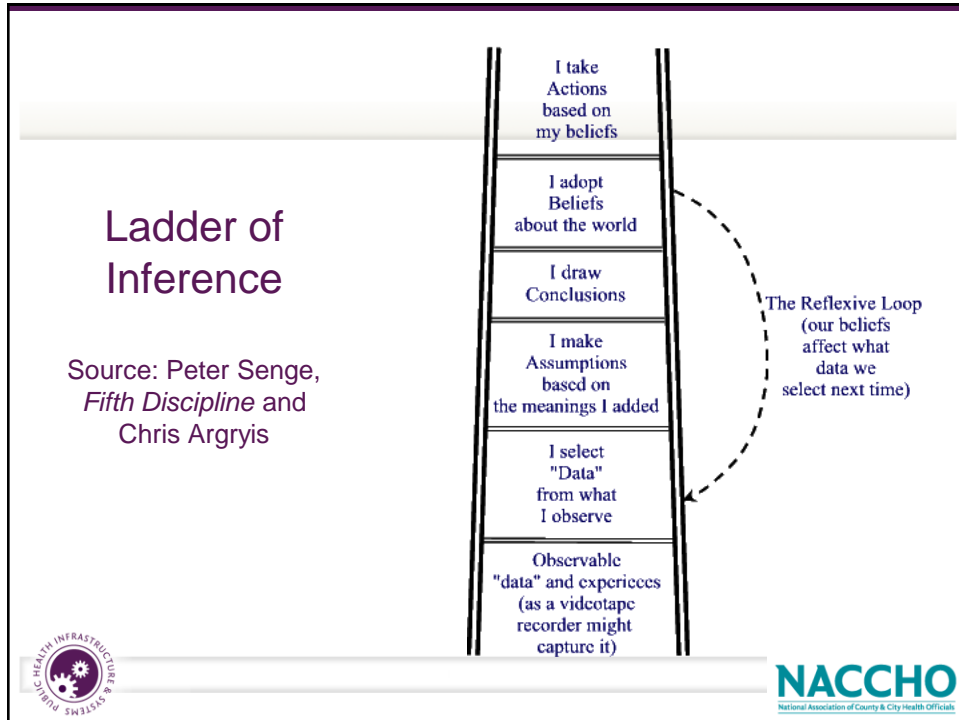
How to work DOWN the Ladder:

- 1) Become aware of your own thinking and reasoning
- 2) Make your thinking and reasoning more visible to others
- 3) Inquire into others' thinking and reasoning (inquiry) - ask "why" questions



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Mental Models (Belief Systems)

- Guide all our actions – they are deep-rooted assumptions, strategies, and ways of looking at whatever we do
 - They have worked in the past – therefore we expect them to work in the future



- Different people can have the same experience – yet explain it in very different ways and attach very different meanings to it



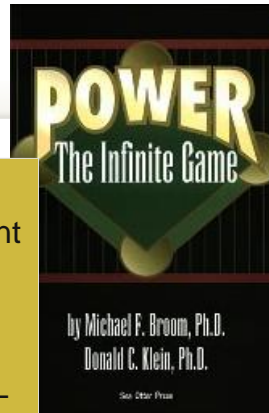
Example: Power

Finite Thinking

- Power is scarce
- Win-lose attitude
- Differences are used to define who is the winner and who is loser
- Differences are threatening – conformity is safe

Infinite Thinking

- Power is abundant
- Win-win proposition
- Differences are valued and safe – they are a source of learning.
- Differences stimulate curiosity, creativity and synergy



Power is one belief system that is very strong – it often impedes progress because of scarcity thinking

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Differences in Beliefs & Values Lead to Conflict

- Research indicates that 94% of behaviors are logical based on the individual's frame of reference
- Relevance for facilitators: Seek to understand the participant's frame of reference
- Ask questions and gain clarity from a position of respecting the individual's position



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Skills for Addressing Conflict

Summarize – let them know they are understood.

- “Let me make sure I understand you. Your interest is _____. Am I right?”
- “From your perspective we should _____. Is that accurate?”
- “Let’s see if I can review the key points we have discussed. Did I understand you correctly?”

Encourage – Give them a full and respectful hearing.

- “Yes, please go on.”
- “Then what happened?”
- “Is there anything else you would like to add?”

Clarity – Ask questions to help get below the surface of an issue.

- “How much of a concern is this?”
- “How does this compare to other situations?”
- “Can you give me an example?”



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Skills for Addressing Conflict

• Acknowledge their point – Recognize their point of view.

- “If I were in your shoes, this is how I might see it also.”
- “I can understand why you believe that.”
- “I see what you mean.”

• Acknowledge their feelings – Don’t ignore their emotions.

- “I can see why you would feel that way.”
- “I can appreciate how you feel.”
- “I respect your right to feel that way.”



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Questions to get people thinking creatively:

- What are all the options to solve this problem no matter how wild or outlandish they may seem?
- What have I seen succeed in similar situations?
- What are all the possibilities?
- What else might we try?
- What are some ways we could deal with this problem?
- Let's get all of the options on the table
- What if we...?
- Do you have any ideas on that?
- If we work together, how might we make this better for all?

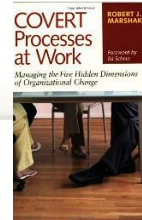


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Covert Processes at Work

- There will always be topics that are “on the table” (overt) and “under the table” (covert)



Covert Processes are:

- Mindsets
- Things denied – such as negative emotions and politics
- Secret hopes and wishes (optimism)
- Repressed or unconscious (fears, anxieties)



(Marshak, 2004)

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5 Keys to Handle Covert Issues

Create a safe environment

- Establish psychological safety to allow dynamics to be revealed
- Establish trust, safety, a sense of control, avoid threats

Be selective and seek movement, not exposure

- Be alert and non-judgmental
- Clarify outcomes
- Measure success by movement

Assume people are trying their best

- Signal your support
- Empathy and further inquiry
- Develop hunches

Look in the mirror

- Be self aware
- Know what is you...and what is them

Act consistent with expectations of you and your role

- Ensure clear understandings
- Re-negotiate expectations



Decision Making Processes

- Be clear about how decisions will be made:
 - Majority vote
 - Leader's decision
 - Consensus (everyone agrees with the decision)
 - Modified consensus (a minority do not agree with the decision, but will support it)
- Often modified consensus is the best decision method, as all participants agree to support the group's decision



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Fist of Five and Modified Consensus

- Have each participant indicate their position:
 - Open hand-full agreement
 - Four fingers up-significant agreement
 - Three fingers up-don't agree, but will support
 - Two fingers up-need more discussion
 - Fist (closed hand)-disagree and will fight the decision
- If everyone's hands show three or more fingers, then OK to move on
- If two fingers or fist, then must discuss further or table issue until later



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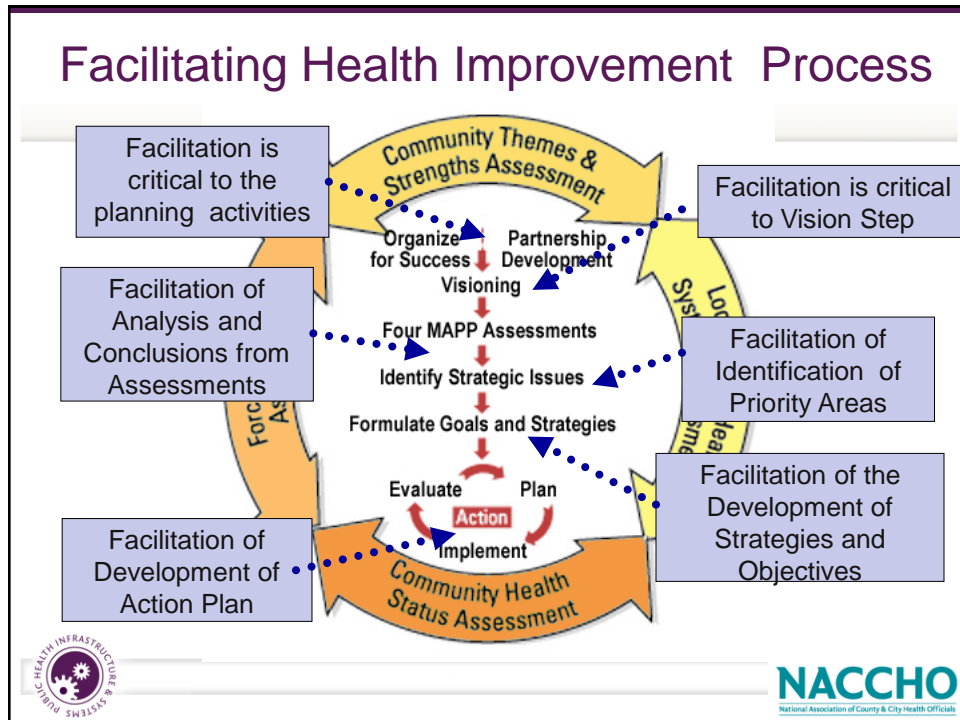
Share Facilitation Experiences!

Please share a successful experience in facilitating a difficult group such as tactics you've used to address conflict or hidden agendas in a group.



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Facilitation References

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- Power, The Infinite Game; Brown and Klein
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- Tome Workout: 50 Team-Building Games and Activities by Parker and Kropp, 2001, American Management Association
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- 50 Ways to Teach Your Learner by Ed Rose with Steve Buckley, 1999. Jossey-Bass/Pfeiffer
- Brain Gym by Paul and Gail Dennison www.braingym.org or www.braingym.com



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What comments or questions do you have?

