Tools & Skills for Engaging Stakeholders

Hilton Myrtle Beach
1000 Beach Club Drive
Myrtle Beach, SC 29572

February 7-9, 2017

NEDARC
The National EMSC Data Analysis Resource Center

Tools & Skills for Engaging Stakeholders

NEDARC Workshop Agenda
February 7-9, 2017 – Myrtle Beach, SC

Day 1

8:30 – 10:45	Leading High-Quality Meetings
10:45 – 11:00	**BREAK**
11:00 – 12:30	Identifying Stakeholders
12:30 – 2:00	**LUNCH ON YOUR OWN**
2:00 – 3:00	Communicating & Engaging Stakeholders
3:00 – 3:15	**BREAK**
3:15 – 5:00	Life Cycle of a Meeting: Before & During the Meeting

Day 2

8:30 – 11:00	Basic Facilitation Skills
10:00 – 10:15	**BREAK**
11:00 – 12:30	Process Tools for Facilitation
12:30 – 2:00	**LUNCH ON YOUR OWN**
2:00 – 3:30	The Art of Asking Questions & Active Listening
3:30 – 3:45	BREAK
3:45 – 5:00	Planning & Organization Skills & Tools

Day 3

8:30 – 10:00	Life Cycle of a Meeting: After the Meeting
10:00 – 10:15	**BREAK**
10:15 – 12:00	Facilitation Training Activity

① ❷ ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨

Identifying Stakeholders

STAKEHOLDER DEFINITIONS

"Someone who holds financial, professional, or personal interest in the progress and outcome of an enterprise."

STAKEHOLDER DEFINITIONS, Con't.

"An organization, group, or individual who could impact or be impacted by the activities, decisions, or outcomes of an endeavor."

STAKEHOLDER MATRIX

	LOW	MEDIUM	HIGH
HIGH			
MEDIUM			
LOW			

POWER
● Finances
● Position

INTEREST / CONCERN / IMPACT

The EMSC Advisory Committee is composed of the following eight core members (required)

- Nurse with emergency pediatric experience
- Physician with pediatric training
- Emergency physician
- Emergency medical technician (EMT) or paramedic who is currently a practicing, ground-level prehospial provider
- EMS state agency representative
- EMSC project director
- EMSC grant manager
- Family representative

STAKEHOLDER MATRIX

POWER

- Finances
- Position

HIGH　　　　MEDIUM　　　　LOW

LOW　　　MEDIUM　　　HIGH
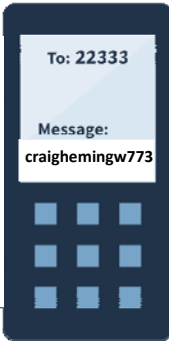
INTEREST or CONCERN

Communicating & Engaging Stakeholders

Overview

- Stakeholder Matrix
- Stakeholder Communication Plan
- Other Communication Tools

Starting with a Poll

- Have you used Polleverywhere?

- Text **22333**

- Message
- **craigheming773**

To: 22333

Message:
craighemingw773

Where did you eat Lunch?

Start the presentation to activate live content
If you see this message in presentation mode, install the add-in or get help at PollEv.com/app

Prioritizing the Stakeholders

The Stakeholder Matrix
is a simple tool to help you,
the project manager, place
each stakeholder in a High,
Medium, or Low

Stakeholder Matrix

POWER
● Finances
● Position

HIGH
MEDIUM
LOW

LOW   MEDIUM   HIGH

INTEREST/ CONCERN/ IMPACT
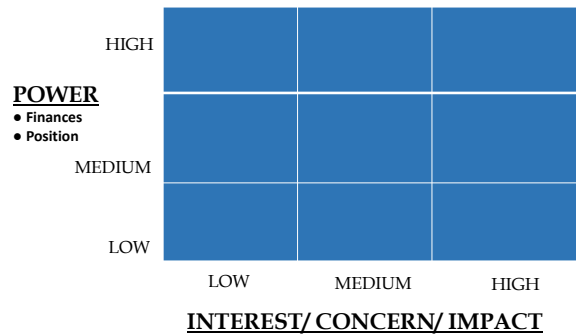
Stakeholder Communication Plan

It's a high level view of **whom, how,** and the **frequency** you communicate with your Advisory Board **between** meetings

Life Cycle of High Quality Meetings

High Volume Communication & Engagement

POW!

Before the Meeting

High Volume Communication & Engagement

POW!

HIGH QUALITY MEETINGS

After the Meeting

POW!

High Volume Communication & Engagement

During the Meeting

Stakeholder Communication Plan

Name	Title	Role	Expectations/Expertise I think this stakeholder can provide for the group	Power	Interest Concern Impact	Priority	Communication

---

Prioritizing Stakeholders

It will show you, who you should be spending the most time communicating with about the project

It can also help you realize if there is anybody you will want to re-evaluate

---

Name	Title	Role	Expectations/Expertise I think this stakeholder can provide for the group	Power	Interest Concern Impact	Priority	Communication
Steve Krug	Heads the Division of EM at Lurie Children's Hospital of Chicago	Chairman of board Ped ER Physician	Chairs the NEDARC advisory board, provides ped hospital ED perspective as well researcher, and national organizational level (AAP disaster preparedness)	H	H	H	It is best to include Steve's admin assistant in our communication. May take some time to get back. Thoughtful deep responses are typical
Ernie Doss	GA Deputy Director of EMS & Trauma	Represent EMS state agencies	Helps us understand the broader state level issues of how EMSC can be integrated with EMS	L	H	H	Email and a phone call follow up with Ernie. Many irons in the fire, call if his opinion is really needed
Justin Allen	MI EMSC Program Manager	Manager with <1yr in role	Represent the needs and perspective of EMSC program managers that are relatively new to the Program	M	M	M	Program Manager. Responsive to all forms of communication
Elizabeth Pihlaja	ND EMSC Program Manager	Manager with 2+ yr in role	Represent the needs and perspective of EMSC program managers who have been in their role for 2-4 years	L	L	L	Program Manager who does not know how to use the phone (millennial) Email works best, Text when time is running out.
Aarron Reinert	Chairperson of the National EMS Advisory Council	National representation	National EMS organization perspective and EMS provider perspective	M	H	M	Aarron is quick to respond to all communication. be prepared to answer clarifying questions
T Morrison-Quinata	Director, EMSC Program	HRSA Project Officer	Oversight of the NEDARC grant from the federal level	H	H	H	Busy, responds to email eventually. Conversations work best, if you can get her on the phone.
Charles Macias	EIIC PI	Co EMSC Resource Center	Co-center activities for collaboration with NEDARC	H	M	H	Charles is busy with being a doctor and running the EIIC. Responds within the deadline
Rhonda Phillippi	TN EMSC Program Manager	Manager with 5+ yr in role	Represent the needs and perspective of EMSC program managers who have been in their role for an extended amount of time and who have different needs than new managers	M	H	M	Deeply involved in Tennessee's EMSC. Responds to Email quickly Phone calls catch her off guard.

---

8 Member Advisory Board Communication Plan

- Let's fill this out
- Use the paper copy in the book
- Fill this out for your state
- Find the "Advisory Board Communication" in the file called Communication on your thumb drive

8 Member Advisory Board Communication Plan

Advisory Board Communication Plan

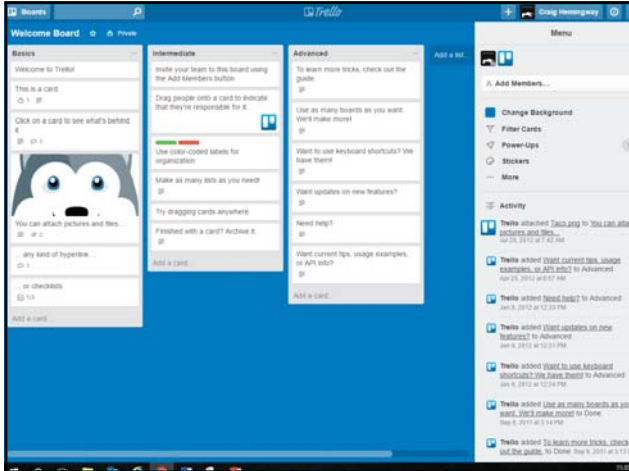| Name	Title	Role	Expectations/Expertise I think this stakeholder can provide for the group	Power	Interest Concern Impact	Priority	Communication
		Nurse with emergency pediatric experience					
		Pediatric Physician					
		Emergency physician					
		EMT/paramedic who is currently a practicing, ground-level prehospial provider					
		EMS state agency representative					
		EMSC Project Director					
		EMSC Grant Manager					
		Family Representative					

Page 1 of 1

8 Members of EMSC Advisory Board

The EMSC Advisory Committee is composed of the following eight core members (required)

- Nurse with emergency pediatric experience
- Physician with pediatric training
- Emergency physician
- Emergency medical technician (EMT) or paramedic who is currently a practicing, ground-level prehospial provider
- EMS state agency representative
- EMSC project director
- EMSC grant manager
- Family representative

Keeping up with the Advisory Board

What are some ways you can keep up with the Advisory Board between meetings?

Utilizing Trello

- Have you heard of **Trello?**
- Trello is a web-based project management application
- At-a-glance organization tool
- Less Email , fewer meetings and more productivity

NEDARC Trello

- https://trello.com/nedarc

Advisory Board Communication Plan

Name	Title	Role	Expectations/Expertise I think this stakeholder can provide for the group	Power	Interest Concern Impact	Priority	Communication
		Nurse with emergency pediatric experience					
		Pediatric Physician					
		Emergency physician					
		EMT/paramedic who is currently a practicing, ground-level prehospial provider					
		EMS state agency representative					
		EMSC Project Director					
		EMSC Grant Manager					
		Family Representitve					

① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨

Basic Facilitation Skills

Definition Of Facilitator

"Facilitation is a way of providing leadership [in groups] without taking the reins.

A facilitator's job is to enable others to [actively participate], assume responsibility and take the lead."

Key Qualities Of Facilitators

- Oriented to process, not content
- Acts neutrally, even when s/he doesn't feel it ("public persona, personal impossibility")
- Keeps focus and is oriented to time
- Able to manage conflict peacefully
- Good, active listener
- Flexible, according to group feedback

Core Facilitator Practices: *EARLY STEPS*

(1. <u>Pre-meeting preparation:</u> lighting, heat, technology, flip charts, room seating arrangement—already covered by Diane)

2. <u>Creating a Collective Agenda</u>, or Buy-in to the Topic and/or the Agenda
- Use of importance scale (re: topic)
- Use of confidence scale (re: agenda strategies for addressing the topic)

(3. <u>Creating norms:</u> already basically covered)

Importance Scale

0	5	10
Unimportant		Very important

"On a scale of 0 – 10, 0 being unimportant and 10 being very important, how important to you is this topic [# X] on the agenda?"

(A pattern of low importance <5 may mean you need different topics on the agenda. Be ready to shift!)

Confidence Scale

0	5	10
No confidence		Very confident

"On a scale of 0 – 10, 0 being no confidence and 10 being very confident, how confident are you that the strategies on the agenda we have for addressing this topic will do so adequately?"

(A pattern of low confidence <5 may mean you need different strategies to address the topic on the agenda. Be ready to shift!)

Core Facilitator Practices: *ACTIVE BEHAVIORS*

- Staying neutral
- Managing digressions from the topic
- Paraphrasing what someone says
- Reflecting back behaviors
- Use of a flip chart over salient points
- Synthesize ideas
- (Asking questions and active listening- addressed in another session)

BASIC FACILIATION SKILLS: 6 CORE ACTIVE BEHAVIORS
PERSONAL CASE SNIPPITS FOR FACULTY TO DEMONSTRATE

Two people will line up in facilitators line, and two in participants line. When you're done in one line, you go to the end of the other line. Leader has a sign on which the particular core behavior is written.

1. **Staying neutral**:
   a) **Participant:** You are **VERY** enthusiastic and tangential about your rather over the top idea of a set of decorations: big blown up balloons of Frosty, Santa, Rudolph, a tall silver tree and flashy bulbs all over it, with colored lights, and everyone has to bring a large-sized present, $50 minimum in cost.
   b) **Facilitator:** You are personally very opposed to commercialism of Christmas, and you're orthodox Jewish. All you are going to do is keep a poker face and nod back to person in his/her over the top presentation, paying attention and listening.

2. **Paraphrasing (a form of reflection):**
   a) **Facilitator:** You paraphrase in a neutral fashion what you heard as the ideas in the extravagant presentation of the extravagant ideas above. "Your ideas for decorations include blow-up balloons, a tall silver tree with lights and bulbs, and large presents with a $50 minimum."

3. **Reflecting behaviors that occur during #1 above:**
   a) **Two participants:** one rolls eyes, looks fidgety, then nods in agreement; the other one whispers to him her: "Can you believe the insensitivity? This isn't a Christmas party, it's for everyone's holidays, and we have Jews, atheists, Muslims, Buddhists and Christians on our staff!"
   b) **Facilitator**: "I'm noticing some side talking going on and some body language that indicates a few of our members may have some concerns. Could you bring those up to the group, please?"

4. **Manage digressions:**
   a) **Participant:** "There are some more important things to be talking about, like the yearly report on the status of children's health in our state that will be available to the public soon. I'd like to go over some of the main issues that I read about that impact our work….."
   b) **Facilitator:** "Thank you, [Name], for your idea and concern. However, I need to remind you that we all agreed on the agenda focused on planning our holiday

party at this meeting, so I'd like to bring us back to the agenda. Let's be sure to put your idea in the minutes under parked items. Who else has ideas about the decorations and gifts for the holiday party?"

5. **Use of flip chart to put down key ideas thus far:**

   a) **Participant:** (Based on #3 above, and as if you are one of those participants) "I appreciate your obvious enthusiasm, [Name], about your Christmas ideas for the holiday party. However, I'm concerned, because we have a very diverse staff of Jews, atheists, those who celebrate Kwanza, Muslims, Buddhists AND Christians, so not everyone celebrates Christmas, whether religiously or commercially. Perhaps we should just have some general decorations that are non-sectarian, and limit our gifts to food for each other."

   b) **Facilitator:** As participant is talking above, writes down on flip chart with bullets: <u>Decorations and Gifts</u> as the big topic. Sub-topics of <u>blow up X-mas balloons</u>, <u>large presents, $50 minimum, tall silver tree with colored lights, flashy bulbs, non-sectarian decorations, gifts of food only</u>

6. **Synthesizing ideas:**

   a) **Participant**: "Maybe one way we could be inclusive is to actually share what each of us did to celebrate the holidays as we grew up in our families, or our practices now, so we can learn about some of the different ways the holidays are celebrated.

   b) **Facilitator**: "It seems like a major concern that has emerged is how to design a party that is really inclusive, and not focused on any one practice around the holidays. What do you all think of going with the simple decorations, everyone bringing in a food they eat at this time of the year, and each of us saying a little about how we celebrate the holidays?"

Basic Facilitation Skills: 6 Core Active Behaviors
EMSC & Facilitation Content For Batting Practice

Cut out the name of the behavior and the content for the participant and put them in a stack. Set up two sets of two lines of people –one line for facilitators, and one line for those who are meeting participants. The leader of the batting practice shows a cardboard sign that says what type of facilitative behavior the facilitator will do, i.e., stay neutral, paraphrase, etc. and hands to the participant the content snippit. The person in the participant line reads it out loud. The leader then reads b) Facilitator directions to the person in the facilitator's line. When you're done in one line, you go to the end of the other line.

1. Staying neutral:

a) Participant:

1. Why do we need so much training on kids when they are only 10% of our calls?

1. Staying neutral:

a) Participant:

2. You have all this funding from the government! Why can't you just buy us pediatric equipment?

1. Staying neutral:

a) Participant:

3. How does the state expect us to do pediatric training when we can't afford any other ongoing EMS training?

b) **Facilitator**: Reflect back what you hear as the concern behind the impassioned statement.

2. Paraphrasing (a form of reflection):

a) **Participant:** READ THE FOLLOWING VERY SLOWLY, AT LEAST TWICE: The EMSC program assists States in expanding and improving State and local capability for reducing and ameliorating pediatric emergencies in the State, taking special care to include children with special health needs, culturally distinct populations and historically underrepresented groups, including Native American/Alaska Natives, and Native Hawaiians; uses existing research-based knowledge, state-of-the-art systems development approaches, and the experience and products of previous EMSC awardees in meeting program goals; and generates support from local public and private sources for sustainability of funded EMSC projects after Federal support terminates, through State legislative, regulatory, or policy changes or other means.

b) **Facilitator:** Paraphrase in a neutral fashion what you heard as the most important points in the above example.

3. Reflecting behaviors:

a) **Two participants:** one rolls eyes, looks fidgety, then nods in agreement; the other one whispers to him her: "Can you believe this idea? This would be such a waste of EMS-C funds."

b) **Facilitator**: Reflect behaviors going on back to the whole group to both include the disruptors and prevent further disruption.

4. Manage digressions:

a) **Participant:** "There are some more important things to be talking about, like the yearly report on the status of children's health in our state that will be available to the public soon. I'd like to go over some of the main issues that I read about that impact our work….."

b) **Facilitator:** Bring the focus back to the agenda.

5. Use of flip chart to put down key ideas thus far:

a) **Participant:** "Okay, I'm getting a little confused. Let me just think this through……So far we've done some practicing of staying neutral no matter how wild the idea is that someone brings up, paraphrasing a really long-winded paragraph – I guess that's because most of us tend to talk on and on, right? – we practiced reflecting back potentially disruptive behaviors – verbal and non-verbal – and then how to handle off-topic digressions. All of these are key behaviors of facilitation?"

b) **Facilitator:** As participant is talking above, writes down on flip chart the key ideas raised thus far, remembering flip chart guidelines

6. Synthesizing ideas:

a) **Participant #1**: "I'd really like to use this Stakeholder Matrix to analyze our existing Advisory Board members in terms of their power and real interest."

Participant #2: "I'm really drawn to using the Stakeholder Registry and Communication Plan to prioritize who needs what kind of communication and when."

b) **Facilitator**: Build one idea on top of the other to create a third idea you can propose to the group to move things forward.

Facilitator's Guide to Participator Decision-Making

Kaner,
Sam. *Facilitator's
guide to
participatory
decision-making*.
John Wiley & Sons,
2007
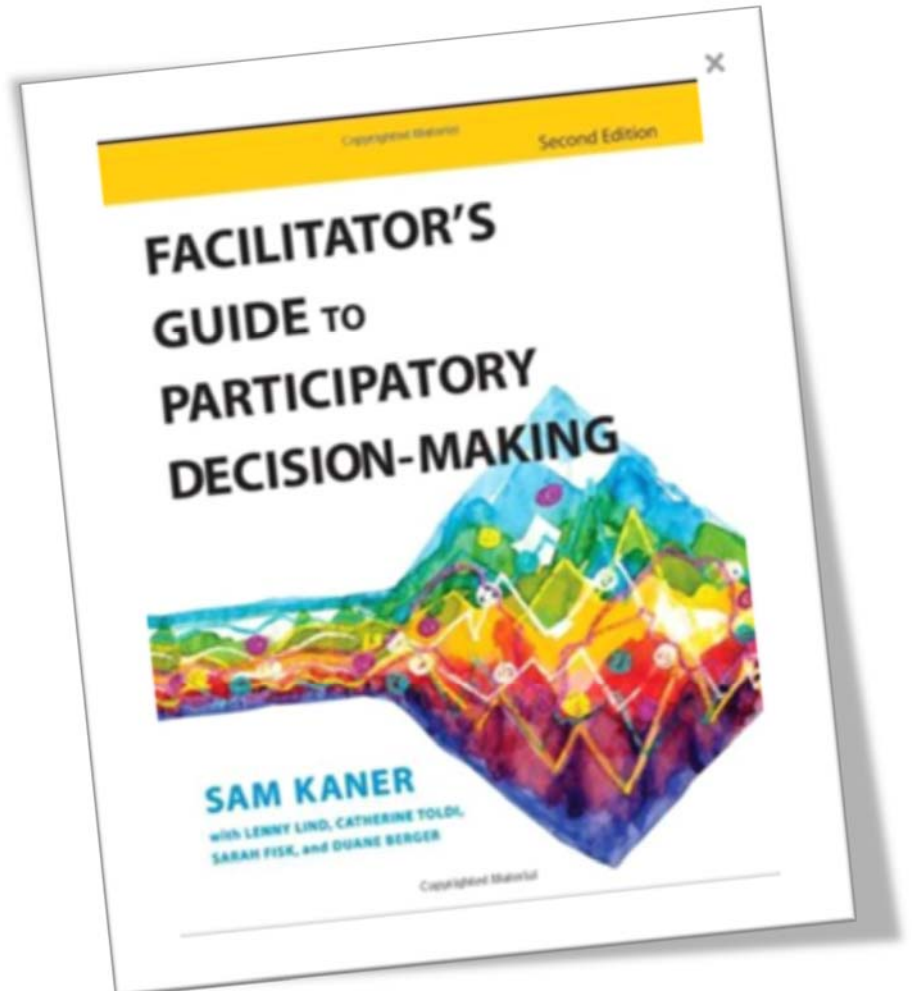
CLASSIC FACILITATOR CHALLENGES

①

PROBLEM	TYPICAL MISTAKE	EFFECTIVE RESPONSE
DOMINATION BY A HIGHLY VERBAL MEMBER	Inexperienced facilitators often try to control this person. "Excuse me, Mr. Q, do you mind if I let someone else take a turn?" Or, even worse, "Excuse me, Ms. Q, but you're taking up a lot of the group's time . . ."	When one or two people are over-participating, everyone else is under-participating. So, focus your efforts on the passive majority. Encourage *them* to participate more. Trying to change the dominant participants just sends even more attention their way.
GOOFING AROUND IN THE MIDST OF A DISCUSSION	Try to "organize" people by getting into a power struggle with them. Raise your voice if necessary. Single out the individuals who seem to be the ringleaders. "All right everyone, let's get back to work." (Or better yet, "Focus, people, focus!")	Often a break is the best response. People become undisciplined when they are overloaded or worn out. After a breather, they will be much better able to focus. Alternatively, ask for advice: "Is there something we ought to be doing differently?"
LOW PARTICIPATION BY THE ENTIRE GROUP	Assume that silence means consent. Don't ask whether everyone understands the key issues and agrees with what's being said. (That just wastes time unnecessarily.) Praise the group for all the work that's getting done, in the hope that flattery will motivate more people to participate.	Always be suspicious of low participation. Dependency, anger, or fear are often factors in play. The group, however, may not want to surface those feelings. If not, shift from *open discussion* to a format that lowers the anxiety level. Work in small groups, or build a list, or try a highly structured activity like a *fishbowl* or a *jigsaw*.

CLASSIC FACILITATOR CHALLENGES

②

PROBLEM	TYPICAL MISTAKE	EFFECTIVE RESPONSE
SEVERAL DIFFERENT TOPICS BEING DISCUSSED AT THE SAME TIME	"Come on, everyone, let's get back on track." "Focus, people, focus!!" Select the topic you think the group would most benefit from discussing, and do your best to sell your point of view: "I'm not at all attached to this, but . . ."	Use *tracking*: Name the various topics in play. "Let me see if I can summarize the key themes being discussed." Use *linking*: "Can you help us link your idea to the central issues before us?" Create a *parking lot* for ideas and issues to return to later.
MANY PEOPLE INTERRUPTING ONE ANOTHER, IN COMPETITION FOR AIRTIME	Take control. Don't be shy about interrupting the conversation yourself, in order to exhort people to be more respectful. Select one person to speak, but give no indication of whose turn will come next. That would undercut spontaneity.	If you must interrupt in order to restore decorum, say, "Pat, I'm going to cut in here. First, let's make sure your point is being heard. Then, I want to suggest a process that will cut down on further interruptions." After you complete your paraphrase, use *stacking, tracking,* and *sequencing* to organize the group.
PEOPLE TREAT ONE ANOTHER DISRESPECTFULLY	Ignore it altogether. No sense throwing fuel on the fire. Pretend that posting a ground rule imploring people to "be respectful" will somehow create respectful behavior.	Increase the frequency of your paraphrasing. People under pressure need support. If proposing a ground rule, be sure to create time for the group to reflect on what's happening and what they want to do differently.

CLASSIC FACILITATOR CHALLENGES

③

PROBLEM	TYPICAL MISTAKE	EFFECTIVE RESPONSE
MINIMAL PARTICIPATION BY MEMBERS WHO DON'T FEEL INVESTED IN THE TOPIC	Act as though silence signifies agreement with what's been said. Ignore them and be thankful they're not making trouble.	Encourage a discussion: "What's important to me about this topic?" Warm up in pairs, so everyone has time to explore his or her stake in the outcome. Before next meeting, ask the planners to assess why people don't seem more invested.
POOR FOLLOW-THROUGH ON ASSIGNMENTS	Give an ineffective pep talk. Ignore it. Excuse it: "Oh well, we didn't really need that information anyway."	Assign the work to teams. Build in a report-back process at a midpoint before the assignment is due. This gives anyone having trouble a chance to get help.
FAILURE TO START ON TIME AND END ON TIME	Announce, "We're going to start in five minutes." Then, five minutes later, repeat the same announcement, but this time say, "Just a few more minutes." Wait for the arrival of the "people who count," but don't bother waiting for anyone with lower ranking. When it's time to end, go overtime without asking. If anyone has to leave, they should know how to tiptoe out without disturbing anyone.	Option 1: Start the meeting when it is scheduled to begin. (Principle: Keep your word.) Option 2: Wait for everyone to arrive. (Principle: If someone's attendance isn't valuable, why is s/he coming in the first place?) Waiting for all will demonstrate that one person's tardiness can waste a lot of salaried staff time. Note: Make sure it is the person-in-charge, not you, who sets the policy and enforces it. If meetings chronically run late, improve your agenda planning.

1/27/17

CLASSIC FACILITATOR CHALLENGES

④

PROBLEM	TYPICAL MISTAKE	EFFECTIVE RESPONSE
TWO PEOPLE LOCKING HORNS	Put the focus exclusively on the interaction between the two disputing parties, as though no one else in the room has an opinion on the issue at hand. Or, treat the two like children. "Come on, you two, can't you get along?"	Reach out to others: "Who else has an opinion on this issue?" or "Are there any other issues that need to be discussed before we go too much further with this one?" Remember: When the majority is passive, focus your attention on *them*, not on the over-active few.
ONE OR TWO SILENT MEMBERS IN A GROUP WHOSE OTHER MEMBERS PARTICIPATE ACTIVELY	"Mr. Z, you haven't talked much today. Is there anything you'd like to add?" This may work when a shy member has nonverbally indicated a wish to speak. But all too often, the quiet person feels put on the spot and withdraws further.	"I'd like to get opinions from those who haven't talked for a while." Breaking into small groups works even better, allowing shy members to speak up without being pressed to compete for airtime.
SIDE CONVERSATIONS AND WHISPERED CHUCKLES	Ignore the behavior and hope it will go away. Chastise the whisperers, in the belief that humiliation is an excellent corrective.	With warmth and humor, make an appeal for decorum: "As you know, those who don't hear the joke often wonder if someone is laughing at *them*." If the problem persists, assume there's a reason. Has the topic become boring and stale? Do people need a break?

33

FACILITATOR'S GUIDE TO PARTICIPATORY DECISION-MAKING

CLASSIC FACILITATOR CHALLENGES

(5)

PROBLEM	TYPICAL MISTAKE	EFFECTIVE RESPONSE
QUIBBLING ABOUT TRIVIAL PROCEDURES	Lecture the group about wasting time and "spinning our wheels." Space out, doodle, and think to yourself, "It's their fault we're not getting anything done."	Have the group step back from the content of the issue and talk about the process. Ask the group, "What is really going on here?"
SOMEONE BECOMES STRIDENT AND REPETITIVE	At lunch, talk behind the person's back. Tell the person-in-charge that s/he must take more control. Confront the person during a break. When the meeting resumes, raise your eyebrows or shake your head whenever s/he misbehaves.	People repeat themselves because they don't feel heard. Summarize the person's point of view until s/he feels understood. Encourage participants to state the views of group members whose views are different from their own.
SOMEONE DISCOVERS A COMPLETELY NEW PROBLEM THAT NO ONE HAD PREVIOUSLY NOTED	Try to come up with reasons to discourage people from opening up this new can of worms. Pretend not to hear the person's comments.	Wake up! This may be what you've been waiting for: the doorway into a new way of thinking about the whole situation.

SESSION TITLE *such as Identifying Stakeholders:* **WORKSHOP INTRODUCTION AND POSTERS**

PRESENTER NAME(S): ANDREA & LENORA

ESTIMATED LENGTH FOR SESSION: 1 HOUR

WHAT COMPONENTS ARE YOU PLANNING TO USE FOR THIS SESSION *such as didactic, discussion, activity, or other:* Combination of didactic, discussion, and activity

NOTE: when making your outline some sessions apply to program/project management as well engaging stakeholders. Please try to cover both when possible in your presentation.

SESSION OUTLINE:

Room setup: Posters with sayings about meetings, facilitation will be hung around the room

1. As participants come into the room on the first morning, NEDARC staff is there to welcome them and let them know to grab some breakfast and then walk around and look at the posters until we get started.

   - Hi, and welcome to Myrtle Beach…glad you all made it here!

I'm Lenora Olson, Principal Investigator of National EMS for Children Data Analysis Resource Center, also known as NEDARC. As many of you may know, we hold about five workshops a year on different topics of interest to you-State Partnership Managers and Directors. This one-Tools and Skills for Engaging Stakeholders-is the final one we are holding for the 2016-2017 grant year. We are really excited about working with you all on this topic for the next two and half days.

2. In a few minutes, we will go over the agenda and other house-keeping items, but first, I want to start with introductions. You will notice that we have name tags. Several participants from past workshops have suggested trying name tags. This can be especially helpful to new managers. The name tags have your first name in big letters so that it is easier to see and it also has room for you to respond to the question-- One of my favorite memory from 2016 is…. So let's go around the room and please tell us your name, the state you are from and your role on the EMSC project and in one sentence one of your favorite memories from the past year. [Faculty will do this too]. I'll get us started…

3. We are going to be working together for the next 2.5 days and we want to be sure that everyone feels that they can speak up with confidence. For that reason we have compiled a list of common group agreements also referred to as norms. Let's review them."

*show group agreement video ~4 min

After the video is over, show the flip chart sheet that lists all of the agreements and ask the group: "Here is the list of those agreements shown in the video.

Are there any more you want to add to the list?"

"To help us all feel safe and participate in the next 2.5 days, can we all agree with this list?

[debrief of group agreement process]

Let's step out of the process now and talk about group agreements/norms and their importance. What do you think is the reason you would want to establish group agreements or norms for your meeting?

What observations do you have about the way the agreements were presented and facilitated?

What questions do you have about this process or group agreements in general?

We've put this video on your jumpdrive in case you want to use it for your own meetings. The facilitation notes for this session are also in your binder as a resource.

4. Logistics-go over the agenda and some logistics, jumpdrive, facilitation guidebook, objectives from managers with us, and you can see what we will all be doing.

Overview of Agenda, organization of workbook and book we provided

Agenda

Discuss the following   [We plan to start and end on time every day-we will have continental breakfast every -we have an hour for lunch today and an hour and and half for lunch tomorrow. Lunch is on your own-there are several restaurants nearby and you can also stay in this room and work if you want. not sure if you want to mention we will have a combination of didactic teaching and hands on work.

Rest rooms are [location]

Electronic evaluation!!! Will be sent to you from our administrator, Margaret Mair and we hope that you fill it out-we used information from the evaluation to modify this

workshop and we always learn something from the evaluation that helps us to improve all of the workshops.

Who has any questions about the agenda and the process for me?

Faculty-do you have anything you want to add?]

5. You may have noticed posters on the wall we asked you to go around and look at posters on the wall when you came in. Not everyone has had time to do that so lets take [5-10 minutes] to get up and look around at the posters. When you are done, grab some coffee or food, if you want before heading back to your seat

Once everyone is back: I am wondering which ones "called to you" or seemed to resonate with you. Throughout the workshop, we want to hear from each of you, which poster you liked and a short description of what you liked about it or what it reminded you of? We have time now to hear from several of you- As we go around the room and discuss, it is ok if several of us like the same poster.

[Go around and listen and mirror/paraphrase] [can ask manager to read it aloud the first time it is mentioned] [If time allows, when participants are done, will ask faculty which ones they like.] Note: if not enough time to do everyone at this time, we will go back to this at different times say right after lunch or after a break until everyone has had a chance to say something.

5. Summary: Wow-we heard a lot of information just now-I hope that you find that by the end of the workshop, you feel more comfortable with facilitation and leading meetings. It looks like over the next several days we will be covering some of the ideas and issues brought up just now. Sometimes we will be using or modelling facilitative behaviors that may or may not work-we will stop and debrief along the way to see what you liked and did not like. We hope that you will also ask questions along the way if you see something or want to ask about any of the processes we are using.

Debrief: What did you think of the opening-did you notice anything that you have used at meetings?

Ask about the group agreements-what did they think of the video idea. Another way to do it depending on time is to have some agreements already on a flipchart and ask participants what to add. Not everyone does it ahead of time-it depends on the group,

how well has it or do you think it will work together and timing (making the video and showing it will take time). What are the uses of group agreements.

Talk about the posters-what did they like or not like-purpose-get people moving and thinking. Do they see a use for it or have they used it in the past? Did they notice mirroring and paraphrasing?

We have an outline of the opening session in the workbook on page ??

Group Agreement/Norm template. Also located on your jumpdrive

Identifying Our Group Agreement

Setting specific items or behaviors that will help us as a group to work together and meet our expectations. Below are group agreements that have been helpful in other workshops. Check the four that are most important to you. Please feel free to add others.

___ Start on time with everyone present

___ Let others finish without interrupting them

___ Be brief and to the point

___ Give everyone a chance to speak

___ Turn off cell phones

___ Have fun

___ Make it known if you do not understand anything

___ Laptop screens down during demonstrations

___ Everyone's input is valued

___ Share both positive and negative perceptions and feelings

___ Others?

Wall Poster Activity

- Facilitative behaviors and skills are essential for anyone who wants to work collaboratively in groups and organizations today. Facilitative skills honor, enhance, and focus the wisdom and knowledge that lay dormant in most groups. These skills are essential to healthy organizations, esprit de corps, fair and lasting agreements, and to easily implement actions and plans.

- The world meets a lot. The statistics are staggering. There are over 25 million meetings every day in the United States and over 85 million worldwide. Making both our work groups and civic groups work much more effectively is a lifelong challenge as rich as the personalities that people them.

- Leadership is a process by which a person influences other to accomplish an objective and directs the organization in a way that makes it more cohesive and coherent.

- With its focus on asking instead of telling, listening and building consensus, facilitation is the essential skill for anyone working collaboratively with others.

- One does not manage people. The task is to lead people. And the goal is to make productive the specific strengths and knowledge of every individual.

- The role of the facilitator was designed to help minimize wheel spinning and dysfunctional dynamics and to enable groups to work together much more effectively.

- Good meetings are great! Good meetings give people a chance to connect with each other, find out what is going on, generate ideas and excitement, make decisions and move forward.

- The Latin root of *facilitate* means "to enable, to make easy."

- A facilitative individual is an individual who is easy to work with, a team player, a person aware of individual and group dynamics. He or she assists colleagues to work together more effectively. A facilitative individual is a person who is skilled and knowledgeable in the interpersonal skills of communication, collaborative problem solving and planning, consensus building and conflict resolution.

- Meetings don't kill people – Bad meetings kill people

SESSION TITLE *such as Identifying Stakeholders:* **Facilitated discussion about high and low quality meetings**

PRESENTER NAME(S): Lenora & Andrea

ESTIMATED LENGTH FOR SESSION: 1 HOUR

WHAT COMPONENTS ARE YOU PLANNING TO USE FOR THIS SESSION *such as didactic, discussion, activity, or other:* **DISCUSSION AND ACTIVITY**

Room set up: Two flipcharts on easel

Colored flipchart markers

Both flipchart will have a blank first page.

One the second page of one flipchart is the following

Ground Rules for Brainstorming

1. Every contribution is worthwhile
    - Even weird, way-out ideas
    - Even confusing ideas
    - Especially silly ideas
2. Suspend Judgement
    - We won't evaluate each other's ideas
    - We won't censor our own ideas
    - We'll save these ideas for later discussion

Then on next pages of both flipcharts have the heading High Quality Meetings on one and on the other Low Quality Meetings.

Introduction: We all go to meetings. Some meetings are better than others. When you think of the meetings you attend throughout the year, think of low quality and high quality meetings and the attributes of each of those meetings. By low quality I am referring to meetings that you leave feeling deflated and often skip. High quality refers to meetings that you leave feeling energized and ready to continue working and you rarely miss.

1) Here's what we are going to do-we are going to generate a list of attributes of low and high quality meetings.

2) When we are done we will have ideas from everyone to share and discuss.

3) Here is how we will do it-we use a brainstorm session

Show the flipchart with the ground rules on it.

- Every contribution is welcome

- Suspend judgement - no evaluation or critique of ideas. There shouldn't even be questions about an idea, clarifications come later.

Ask participants if they are willing to follow these ground rules. If not work with group to modify the rules to fit the needs of all members

4) Here is why we are using this process- to generate as many ideas as possible. At this stage we are not trying to make sense of anything, just throw ideas out without clarifying or evaluation– the more ideas the better!

We are going to start with individual brainstorming and then move to group brainstorming. The entire process will take about half an hour or so.

Any questions? [wait] Ok, lets get started

First, we will take about two minutes for everyone to write down some features of each of the type of meetings. You won't have to show this to anyone. This is intended solely to help you clarify your own ideas. Grab a piece of paper and pen and put a dividing line down the middle. On one side write Low Quality meetings and on the other side write High Quality meetings.   When that is done say ok start!

[Everyone individually and quietly writes as many different solutions or answers as possible. After a brief time, I will say, "OK write your last idea down!" and the participants will finish their last idea.]

Next: We will share our ideas. The goal is to generate as many ideas as possible. At this stage we are not trying to make sense of anything, just throw ideas out – the more the better!

This could be done two ways. Use round robin for the first go around-everyone will say one idea about high or low quality meetings and then we will have another go around-if person said something about high quality then they will say something about low quality. After two structured go arounds-ask folks what else they have.
OR
Ask someone to call out an item for high quality and then low and keep going that way until no more ideas are generated.

During this time use different ways to facilitate including mirroring, moving around, treat all ideas the same way, encourage participation (let's hear from someone who hasn't spoken in a while),

Recorder will use capital letters, different colors etc.

Debrief when done. Use questions such as
- Have you heard anything new?
- How did this go for you?

Wrap up thoughts

One of the first things you need to determine is whether you need to use a brainstorming session at all. A brainstorming session should be used for generating lots of new and diverse ideas and solutions. It should not be used for analysis or for decision making. It can be used to build lists for

- New Goals
- Unexpressed concerns
- Obstacles to meeting a goal
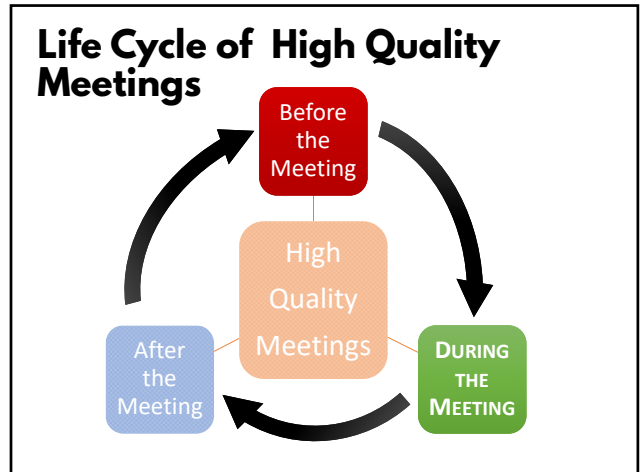- New directions
- Underlying causes of a problem

This is only the beginning of a process-you will need to analyze and judge the ideas but this is done afterwards and the analysis process does not involve brainstorming techniques. We will be using some of these other techniques throughout the day. One way to do it is go over each idea in detail so that it is fully developed and understood. Can combine similar ideas that are worded differently. Then you could use a decision grid or multi voting to sort out the ideas (Decision Grid, page 174 and Multi Voting, page 168 in *Facilitation at a Glance*).

Debrief about entire process-what did participants notice? What could we have done differently? How has anyone used brainstorming in the past and how did it work?

Process Tools for Facilitation

What are they & why use them?

Life Cycle of High Quality Meetings

Before the Meeting

During the Meeting

After the Meeting

High Quality Meetings

Process tools are used for

- **Encouraging** participation & discussion

- **Tackling** difficult issues
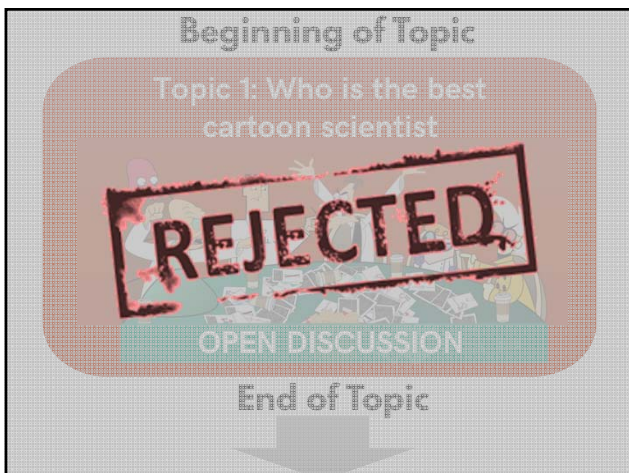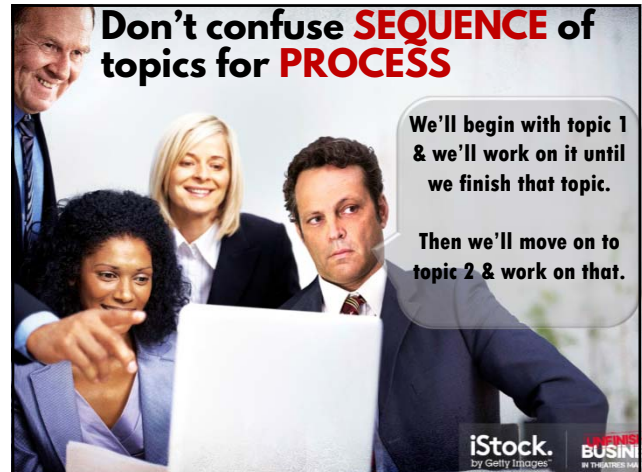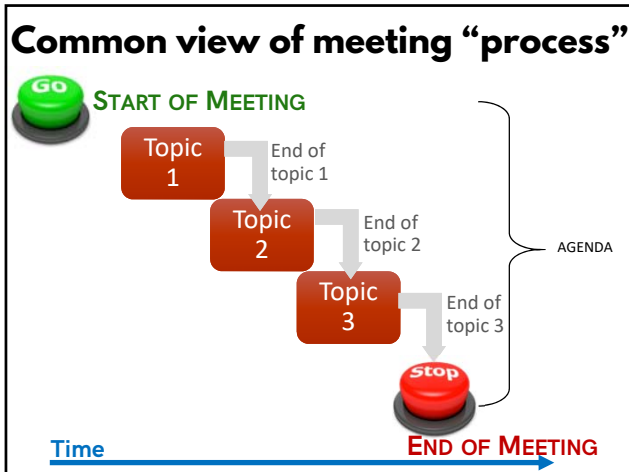
- **Prioritizing** & planning


Open Discussion & Presentations

2 commonly used meeting "process tools"

Common view of meeting "process"

START OF MEETING

Topic 1 → End of topic 1
Topic 2 → End of topic 2
Topic 3 → End of topic 3
Stop

AGENDA

Time

END OF MEETING

Beginning of Topic

Topic 1: Who is the best cartoon scientist

OPEN DISCUSSION

End of Topic

Open discussion puts a lot of performance pressure on participants

Inhibits participation from *introverts* & those who need to "process"

In contrast other process tools give opportunity for rough-draft thinking

Divide time on topics into different PARTICIPATION FORMATS through various PROCESS TOOLS

It's the simplest way to boost ENERGY

By giving participants opportunity to work . . .

individually

in pairs

and in triads

Shifting back & forth between whole & subgroups

Varying participation formats strengthens participation

Helps participants focus

& stay clear about the short-term objectives

Topic 1 Process Participation Formats

More Effective Formats

Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007. page 95

Practical Application

Topic 1: What 1-2 characteristics make a good cartoon scientist?

Participation Format #1
START
END

Participation Format #2
START
END

Participation Format #3
START
END

Listing Ideas Format:
6 Recommended Uses

1. Jump-starting a discussion
2. Showing a polarized group there are more than 2 competing opinions
3. Searching for better understanding of causes of problem
4. Generating a list of innovative solutions
5. Bringing large group back together after working in small groups
6. Providing structure when topic feels out-of-control

Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007. page 96
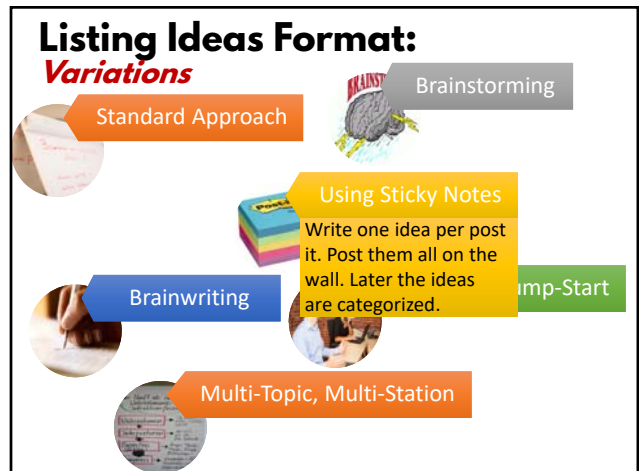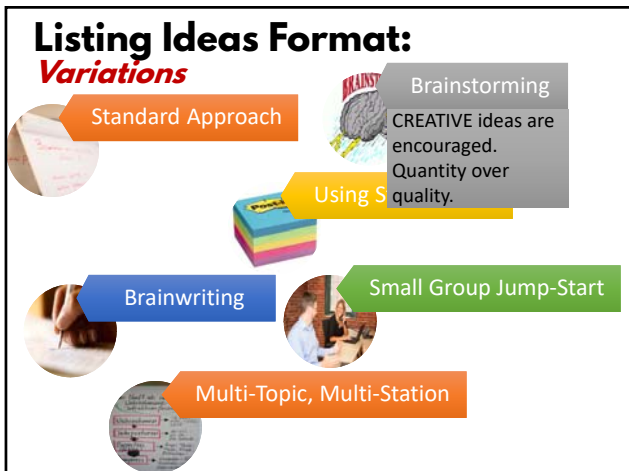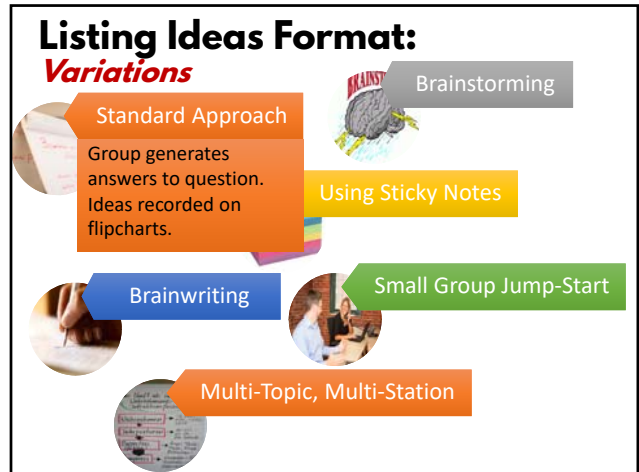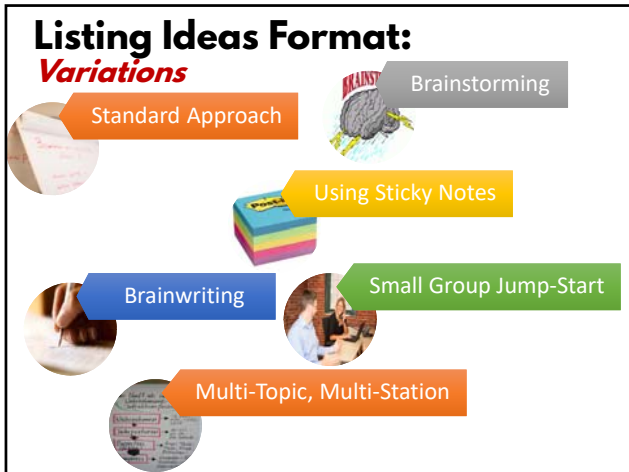
Listing Ideas Format:
Variations

Standard Approach

Brainstorming

Using Sticky Notes

Brainwriting
Write ideas on paper. Intervals trade papers & add fresh ones.

Small Group Jump-Start

Multi-Topic, Multi-Station

Listing Ideas Format:
Variations

Standard Approach

Brainstorming

Using Sticky Notes

Brainwriting

Small Group Jump-Start
Form pairs & discuss question. Bring back to whole group & build a list of ideas.

Multi-Topic, Mu...

Listing Ideas Format:
Variations

Standard Approach

Brainstorming

Using Sticky Notes

Brainwriting

Small Group Jump-Start

Multi-Topic, Multi-Station
Flipcharts w/ different topics around room. Start at a topic & every few minutes move to new flipchart & topic.

What 1-2 characteristics make a good cartoon scientist?

Participation Format #1

START

END

Format 1: Use Sticky Notes

Structured Go-Arounds Format:
7 Recommended Uses

1. Opening a meeting
2. Structuring a complex discussion
3. Making room for quiet members
4. Gathering diverse perspectives
5. Compensating for differences in status & rank
6. Returning from break after heated disagreement
7. Closing a meeting

Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007. page 99

Structured Go-Arounds Format:
Variations
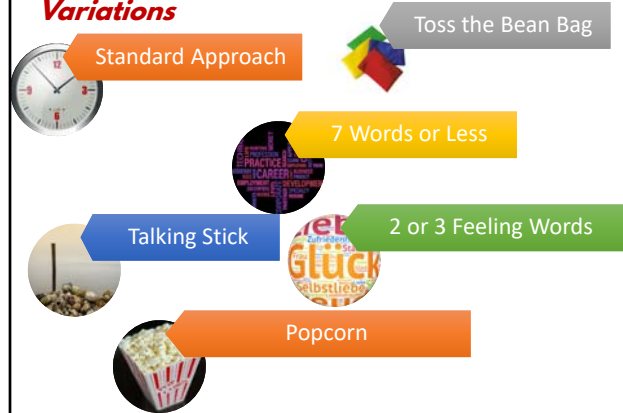
Standard Approach

Toss the Bean Bag

7 Words or Less

Talking Stick

2 or 3 Feeling Words

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Clockwise or counterclockwise go around the room.

Toss the Bean Bag

7 Words or Less

Talking Stick

2 or 3 Feeling Words

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Toss the Bean Bag

After the speaker ends, they toss an object to someone else who speaks next.

7 Words or Less

Talking Stick

2 or 3 Feeling Words

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Toss the Bean Bag

7 Words or Less

People end a meeting with no more than 7 words – fragments are fine.

Talking Stick

g Words

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Toss the Bean Bag

7 Words or Less

Talking Stick

Speaker hold stick & speaks **from heart**. No one else can speak until stick is passed to someone.

2 or 3 Feeling Words

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Toss the Bean Bag

7 Words or Less

Talking Stick

2 or 3 Feeling Words

People end a meeting with 2 or 3 FEELING words that describe the mood.

Popcorn

Structured Go-Arounds Format:
Variations

Standard Approach

Toss the Bean Bag

7 Words or Less

Talking Stick

2 or 3 Feeling Words

Popcorn

Everyone takes a turn with no order. When most have spoken, facilitator asks "Who hasn't had a turn?"

Which of these characteristics would you eliminate based on . . .?

Participation Format #1   Participation Format #2

START   START

END   END

Not appealing to grade school children

Post-it !

Format 2: Go Around Standard Approach

Working in Small Groups Format:
6 Recommended Uses

1. Breaking the ice – making it feel safer to participate

2. Keeping the energy up

3. Deepening everyone's understanding of the topic

4. Exploring different aspects of an issue quickly

5. Building relationships

6. Greater commitment to the outcome

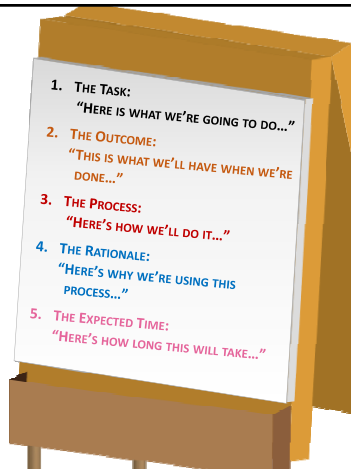Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007. page 102

Working in Small Groups Format:
Variations

Casual Conversation

Talk, Then Switch

CHANGE

Two Rounds or More

ROUND 2

Breakout Groups

Speed Dating

SPEED DATING

Working in Small Groups Format:
Variations

Casual Conversation
- 2+ participants
- Informal
- Brief: 3-7 minutes

Talk, Then Switch

CHANGE

Two Rounds or More

2

Breakout Groups

Speed Dating

DATING

Working in Small Groups Format:
Variations

Casual Conversation

Talk, Then Switch
- Working in pairs
- One talker, one listener
- Switch roles at set time
- Debrief: 5-8 minutes

Two Rounds

Breakout Groups

Working in Small Groups Format:
Variations

Casual Conversation

Talk, Then Switch

Two Rounds or More
- Working in pairs
- **Round 1**: talk, then switch
- **Round 2**: repeat sequence
- 10-15 minutes

Breakout Group

Working in Small Groups Format:
Variations

Casual Conversation

Talk, Then Switch

Two Rounds or More

Speed Dating

Breakout Groups
- Any number of participants
- Objective: make significant headway on task
- Chartwriting adds value
- 30-45 minutes

Working in Small Groups Format:
Variations

Casual Conversation

Talk, Then Switch

Two Rounds or More

Speed Dating
- Working in pairs
- Objective: explore diversity
- Casual conversation
- Switch partners at set time
- 15-30 minutes

Breakout Groups

Individual Writing Format:
8 Recommended Uses

1. Giving members time to collect thoughts

2. Reflecting privately on something unusual

3. Preserving anonymity

4. Helping people remain engaged

5. Allowing for members to collect thoughts & feelings

6. Producing 1st draft of a written product

7. Providing input to decision-maker who doesn't attend

8. Evaluating a meeting

Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007. page 106

Individual Writing Format:
Variation

Standard Approach

Everyone takes a turn writing something down relevant to the topic or question. Facilitator then collects everyone's notes or has individuals report back to the group.

Setting the FRAME for the participation format

1. THE TASK:
"HERE IS WHAT WE'RE GOING TO DO…"

2. THE OUTCOME:
"THIS IS WHAT WE'LL HAVE WHEN WE'RE DONE…"

3. THE PROCESS:
"HERE'S HOW WE'LL DO IT…"

4. THE RATIONALE:
"HERE'S WHY WE'RE USING THIS PROCESS…"

5. THE EXPECTED TIME:
"HERE'S HOW LONG THIS WILL TAKE…"

Overview of Main Types of Process Tools

It's important to know how to use a **wide range** of process tools to be a good facilitator

SWOT/SWOC

Useful at the start of strategic conversations

	Helpful	Harmful
Internal	Strengths **S**	Weaknesses **W**
External	Opportunities **O**	Threats **T**

p.156

SWOT/SWOC: Strategic Planning

When To Use It	To provide a framework a the start of strategic planning & to gather data about the environment.
Purpose	Creates balance of positives & negatives to ensure consideration during planning process.

Bens, Ingrid. *Facilitation at a Glance!: Your Pocket Guide to Facilitation.* GOAL/QPC, 2008.

Visioning

Participative approach to goal setting.

EVERY voice must be heard.

p.160

Visioning: Goal Setting

When To Use It	When members need to clarify their thoughts & then share with each other to create clear shared statement of desired future
Purpose	Allows everyone to put forward their ideas & is heard from. Creates energy. Gets people aligned & a way to identify a group goal

Visioning Example for EMSC

Imagine that it's exactly 5 years from today:

- *Describe how you see the EMSC Program in your state?*
- *What specific improvements have been made in your state regarding to the new performance measures?*
- *What problems have managers solved implementing the new measures?*
- *What specific outcomes have been achieved?*
- *How are people behaving differently?*

Brainstorming

Collect potential ideas with group.

No bad ideas at this stage.
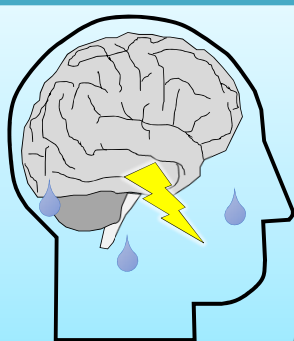
p.162

Brainstorming: Idea Generating

When To Use It	To generate free flow & wide range of ideas, not bounded by usual barriers. To get everyone involved & create energy.
Purpose	A way to challenge traditional thinking. Lets people put ideas out without fear of being challenged.

GROUND RULES FOR BRAINSTORMING

1. Every contribution is worthwhile
- Even "weird" ideas
- Even confusing ideas
- Especially silly ideas

2. Suspend Judgement
- No evaluation of each other's ideas
- No censoring our own ideas
- We'll save these ideas for later discussion

3. We can modify this process before it starts or after it ends, but NOT while it's underway
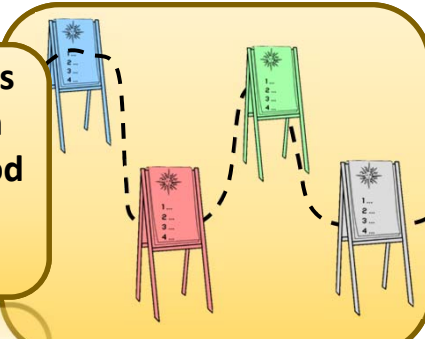
Flip Chart / White Board Writing Tips

LETTERING	COLORS	SPACING
PRINT IN ALL CAPITAL LETTERS	ALTERNATE COLORS	1 INCH IS GOOD TEXT HEIGHT
MAKE THICK-LINED LETTERS	USE EARTH TONES FOR TEXT	2 INCH MARGINS
WRITE STRAIGHT UP & DOWN	USE HOT COLORS FOR HIGHLIGHTING	1 INCH SPACE BETWEEN LINES
CLOSE LETTERS B INSTEAD OF ℬ	AVOID ▇ USE BLACK FOR NUMBERING	DON'T INDENT
USE PLAIN, BLOCK LETTERS *Script slows down reading*	BEWARE OF COLOR CODING	WHITE SPACE — USE IT!
PRACTICE, PRACTICE, PRACTICE	HOLD 4 MAKERS AT ONCE	DON'T CROWD TOP OR BOTTOM OF PAGE

Adapted from Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, page 86-96

Wandering Flip Charts

Explore lots of issues in short period of time

Wandering Flip Charts: Idea Generating

When To Use It	When you need to explore wide range of topics with large group (20+) & have little time. For topics that people may not want to discuss in open conversation.
Purpose	Creates safe environment & anonymous setting for conversation.

Bens, Ingrid. *Facilitation at a Glance!: Your Pocket Guide to Facilitation*. GOAL/QPC, 2008.

Forcefield Analysis

Effective way to evaluate pros & cons of a situation

p.165

Forcefield Analysis: Opposing Forces

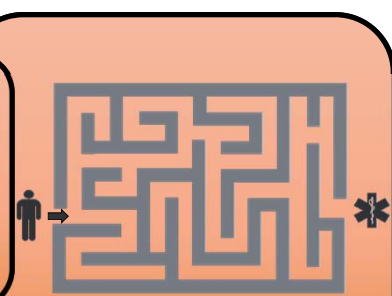| When To Use It	When you need to surface all the factors at play in a situation, so that barriers & problems can be identified.
Purpose	Clarifies the resources available & also the barriers or challenges. Helps the group understand what they need to do to succeed.

Forcefield Analysis Variations

- PROs
- Things we are doing well
- Hopes
- Best case scenario
- Assets
- Strengths
- Positives
- Opportunities

- CONs
- Things we could do better
- Fears
- Worst case scenario
- Liabilities
- Weaknesses
- Negatives
- Obstacles

Gap Analysis

A good way to see "what we need to do"

p.166

Gap Analysis: Identifying Blocks

When To Use It	When a group needs to understand the gap between where they are & where the want to be.
Purpose	Lets you explore the missing steps between where you are & where you want to be. Forces a realistic look at the present. Helps ID steps to get to where you want to be.

Multi-voting

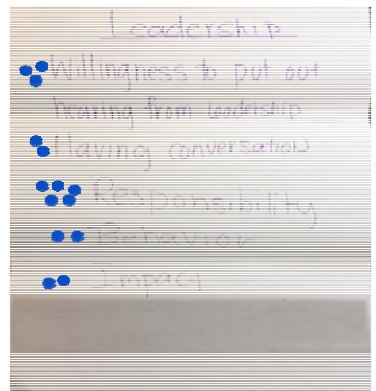**Rank ideas quickly in group setting based on priority**

p.168

Multi-voting: Decision Making

When To Use It	When a group has to discuss & make decisions about a long list of items to prioritize.
Purpose	Quickly establishes a clear set of priorities

2 Methods for Multi-voting

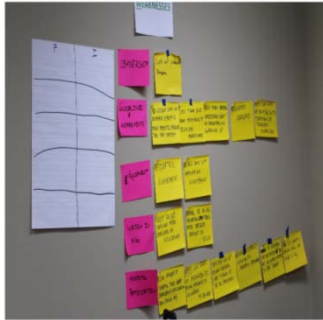Method 1: Voting with Sticker Dots

2 Methods for Multi-voting

Method 2: Distributing Points

Example from KS strategic planning
Weaknesses had five groups so ranking was from 1 to 5.

1= least feasible/important to obtain
5= most feasible/important to obtain

Jumpdrive: KS Facilitator Agenda, facilitator instructions on page 5

Multi-voting: Distributing Points KS results example

Weaknesses had five groups so ranking was from 1 to 5.
1= least feasible/important to obtain
5= most feasible/important to obtain

Weaknesses Ranking Results listed from most feasible AND most important to least.

Group Statement*	Feasibility		Importance		Feasibility + Importance Ranking
	Individuals Ranks	Cumulative Ranking	Individuals Ranks	Cumulative Ranking	
Leadership	1, 5, 2, 3, 5, 3	19	4, 5, 2, 5, 3, 4	23	42
Hospital Participation	3, 1, 3, 4, 3, 4	17	5, 4, 1, 3, 5, 2	20	37
Equipment	5, 4, 5, 1, 2, 1	18	1, 1, 5, 2, 4, 3	16	34
Guidelines & Agreements	4, 2, 1, 5, 4, 2	18	2, 3, 4, 4, 1, 1	15	33
Weigh in KGs	2, 3, 4, 2, 1, 5	17	3, 2, 3, 1, 2, 5	16	33

*Refer back to affinity diagramming to see which Weakness brainstorming ideas fell under each statement

From Final KS EMSC 3-year strategic Planning Report: point distribution results for WEAKNESSES group

Exit Surveys

Anonymous feedback from participants

Tell us what **you** think!

p.178

Exit Surveys: Evaluation

When To Use It	At the end of the meeting or at mid-point – whenever you want to take the pulse of the group.
Purpose	Provides data about the effectiveness of interaction so that issues can be addressed.

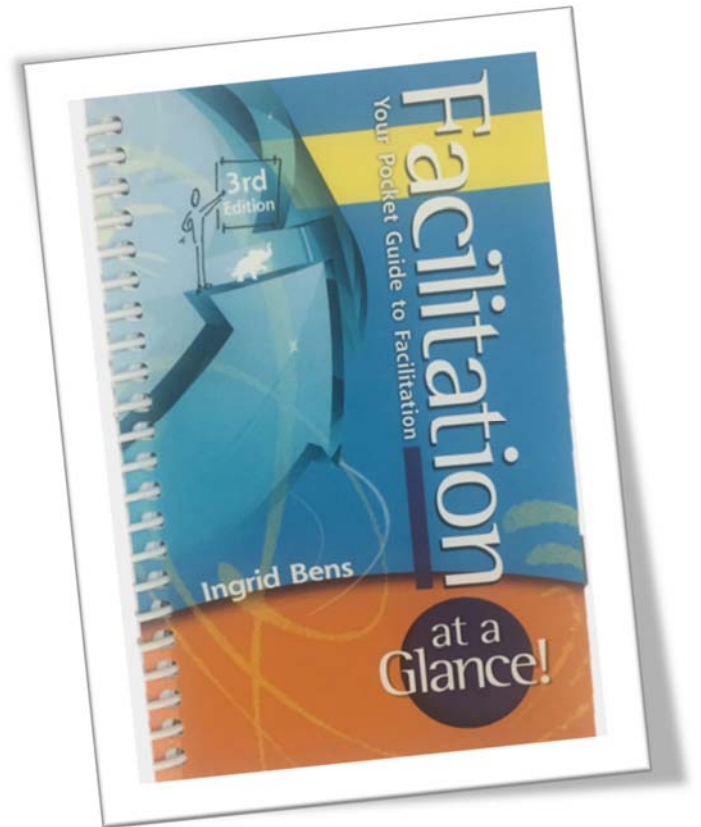Bens, Ingrid. *Facilitation at a Glance!: Your Pocket Guide to Facilitation*. GOAL/QPC, 2008.

Format 3: Multi-Voting

Facilitation at a Glance

Creating Targeted Norms: pp 77-78

Managing the Flipchart: 21

Brainstorming: pp 162-164

Flip Chart/White Board Writing Tips

SPACING	COLORS	LETTERING
1 INCH IS GOOD TEXT HEIGHT	ALTERNATE COLORS	PRINT IN ALL CAPITAL LETTERS
2 INCH MARGINS	USE EARTH TONES FOR TEXT	MAKE **THICK-LINED** LETTERS
1 INCH SPACE BETWEEN LINES	USE **HOT** COLORS FOR HIGHLIGHTING	WRITE STRAIGHT UP & DOWN
DON'T INDENT	AVOID USE BLACK FOR NUMBERING	CLOSE LETTERS **B** INSTEAD OF *ß*
WHITE SPACE — USE IT!	BEWARE OF COLOR CODING	USE PLAIN, BLOCK LETTERS *Script slows down reading*
DON'T CROWD TOP OR BOTTOM OF PAGE	HOLD 4 MAKERS AT ONCE	PRACTICE, PRACTICE, PRACTICE

Adapted from Kaner, Sam. Facilitator's guide to participatory decision-making. John Wiley & Sons. page 86-96

Facilitator's Guide to Participator Decision-Making

Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007

5

CHARTWRITING TECHNIQUE

USING MARKERS AND FLIPCHARTS
TO SUPPORT FULL PARTICIPATION

▶ **The Power of a Group Memory**

▶ **The Role of ChartWriter**

▶ **Lettering**

▶ **Colors**

▶ **Symbols**

▶ **Formats**

▶ **Spacing**

▶ **Tips and Technique**

▶ **After the Meeting**

FORMATS

1. THE LIST

The list is the most common format. It consists of a title, or heading, followed by a series of items, each demarked by an oversized dot, often called a "bullet."

Some lists contain subdivisions of items organized into categories, as shown in the right-hand diagram. For lists of this type, the category titles are numbered or underlined. Bullets are used to demark the items within each category.

TITLE
- ITEM
- ITEM
- ITEM
- ITEM
- ITEM

TITLE
1. SUB-TITLE
   - ITEM
   - ITEM
2. SUB-TITLE
   - ITEM
   - ITEM
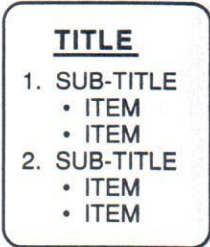
2. THE MATRIX

A matrix is a grid with headings placed both horizontally (across the top) and vertically (along the left side). A matrix can be used to help a group discuss relationships between two or more variables.

	PRO	CON
IDEA 1		
IDEA 2		
IDEA 3		

3. THE FLOWCHART

A flowchart can describe how something works, or it can show a sequence of events.

IF THIS — THEN → THIS → OUTCOME A
IF THIS — OR → THAT → OUTCOME B
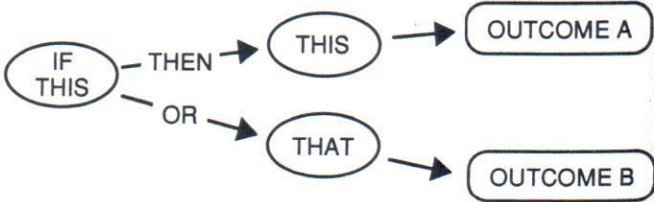
TIPS AND TECHNIQUES

WHAT TO LISTEN FOR	HOW TO WRITE IT
Suggestions Example: "Let's check in with each other once a day until we actually hold the conference."	CHECK IN DAILY TILL CONFERENCE
Logical Connections Example: "In this organization, it's clear to me that absences and low morale are related to one another."	ABSENCES ⟷ LOW MORALE
Summary Statements Example: "So what we're saying is that we want this program to target both teachers and parents."	TARGET GROUPS: TEACHERS AND PARENTS
Open Questions Example: "I know this is off the subject, but I'm still confused about whether we're ever going to hire a new financial assistant."	☆ HIRE FINANCIAL ASS'T? ☆ OPEN QUESTION
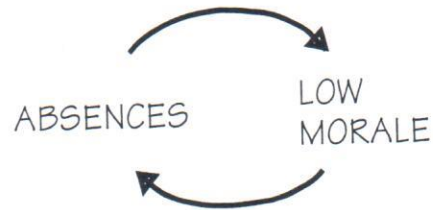
Don't worry about capturing every word a speaker says. Just be sure to preserve the meaning of what has been said.

TIPS AND TECHNIQUES

1. SENTENCES ARE EASY TO READ

"Send thank-you note to Bill" is much easier to understand than "note to Bill" because it includes a noun and a verb. Here's the guideline: *Will it be understandable in a week?*

2. DON'T BE SHY – WRITE "WE" AND "I"

Some beginners feel awkward using these pronouns. For example, instead of writing, "We want a meeting," a beginner might write, "They want a meeting" or "You want a meeting." Remember: it's the group's record – write with their voice.

3. VERBS AND NOUNS ARE HIGH PRIORITY

Example: If you hear "I hope we remember to write a warm thank-you note to that great caterer," get the key verbs and nouns first: "Send note to caterer."

4. ADJECTIVES AND ADVERBS ARE LOW PRIORITY

It's fine to write the adjectives and adverbs – like "warm" and "great" in the example above – but only if you have the time.

5. USE ONLY STANDARD ABBREVIATIONS

Do not invent abbreviations in order to write faster. For example, do not write "defnt" for "definite" or "expl" for "explain." Here's the guideline: *Will this be understandable to someone who did not attend the meeting?*

6. TITLE EVERY PAGE

Every page needs a title, even if it says "[title of previous page] page 2."

7. ENCOURAGE PROOFREADING

Invite people to read over your work. Accept corrections gladly. Even if it messes up your beautiful chart, remember that's how it becomes *their* chart.

AFTER THE MEETING

1. CHECK TITLES AND PAGE NUMBERS

Make sure all pages are titled, numbered, and arranged in a way that will be understandable at a later date.

2. ROLL UP THE PAGES TOGETHER, AND LABEL THEM

Flipcharts are often brought back to the next meeting. It is difficult to hang pages that have fold creases in them. It's also difficult to read them. Therefore, when you're taking charts off the wall, roll rather than fold.

Label the outside of the rolled-up paper with three items of information:
- Name of the meeting
- Date of the meeting
- Topics

- Staff Meeting
- October 23
- pp. 1–4 Goals of Dept. Re-org.
- pp. 5–9 Unsolved Problems

3. SECURE THE PAGES WITH TWO RUBBER BANDS

Most people instinctively reach for cellophane tape or masking tape to secure the pages once they're rolled. Don't. The adhesive often sticks to the pages so well that the pages rip when you peel them apart. Instead, use paper clips or rubber bands.

4. CLARIFY YOUR ROLE IN RELATION TO DOCUMENTATION

- Will you be responsible for organizing and distributing copies of the flipcharts, or will you be handing off the charts "as is" to someone in the group?

- If you are responsible for creating the documents, consider photographing the charts with a digital camera. Copies can be downloaded and printed inexpensively. Letter-size documents are much easier to copy, store, and distribute than flipcharts, and photos are more effective as a memory jog than typed minutes of a meeting.

5. THESE STEPS DEMONSTRATE PROFESSIONALISM

Each of the previous four steps is an excellent opportunity to demonstrate thoroughness and efficiency. Group members will notice it. They may not acknowledge it verbally, but they will recognize that they are working with a professional.

Facilitator's Guide to Participator Decision-Making

Kaner, Sam. *Facilitator's guide to participatory decision-making*. John Wiley & Sons, 2007
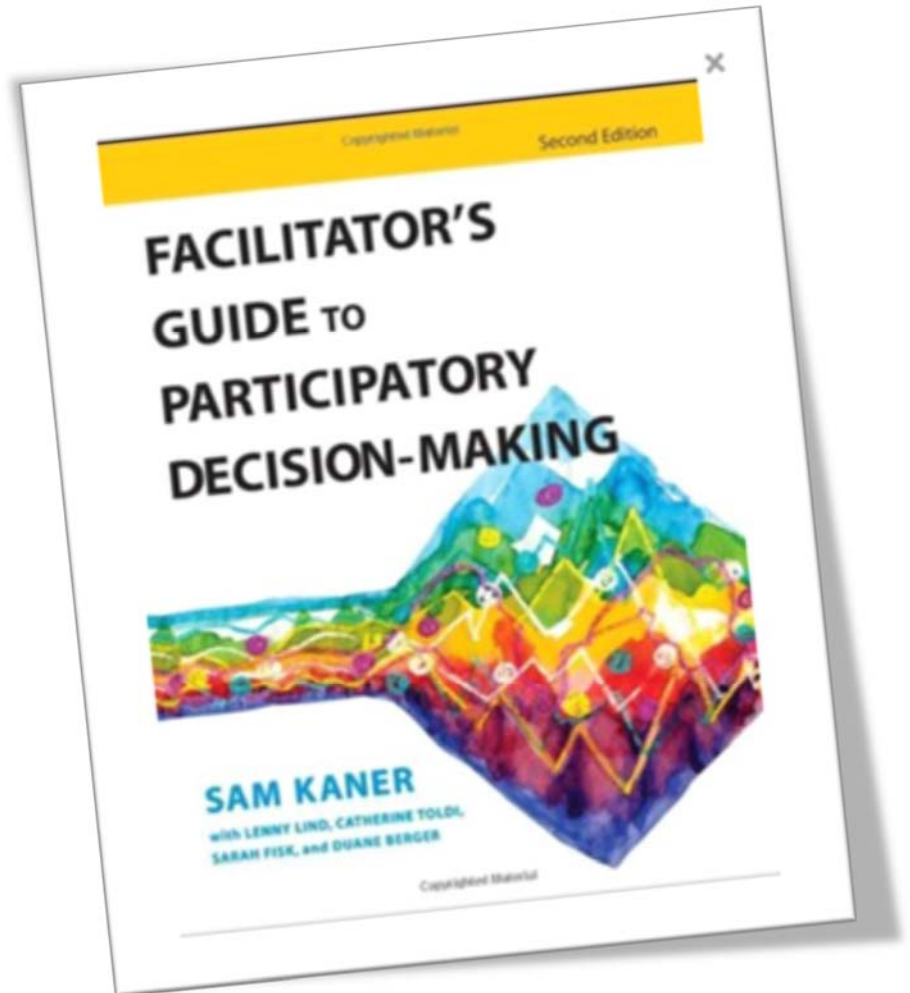
8

BRAINSTORMING

THE THEORY AND TECHNIQUE OF SUSPENDED JUDGMENT

- ▶ **The Cost of Premature Criticism**

- ▶ **Suspended Judgment**

- ▶ **Ground Rules for Brainstorming**

- ▶ **Facilitator's Do's and Don'ts for Brainstorming**

- ▶ **The Many Uses of Brainstorming**

THE COST OF PREMATURE CRITICISM

Rough-draft thinking is just like rough-draft writing: it needs encouragement, not evaluation. Many people don't understand this. If they notice a flaw in someone's thinking, they point it out. They think they've been helpful. But rough-draft ideas need to be clarified, researched, and modified before being subjected to critical evaluation. The timing of critical evaluation can make the difference between the life and death of a new idea.

EXAMPLE

A small but growing law firm was looking for office space. The firm's administrator researched the possibilities, then offered a proposal: "I found 8,000 square feet on the north side of town for $10,000 per month for a one-year lease. The owner will lower the rent to $8,000 if we sign a five-year lease. We could offset our rent by subletting to the current tenant. The north side isn't great at night, but it's near public transportation and has plenty of parking. I think we should seriously consider this location." This was a fully developed proposal, ready to be critiqued. If it contained any flaws, now was the time to find them.

However, several months earlier, the group had shot down the administrator's initial proposal. "Since larger spaces are cheaper," the administrator had said, "what if we rented a big office and sublet some of it?" Someone responded, "Forget it. We don't have time or energy to find people to sublet." Someone else said, "I don't want to be responsible for too much space. After all, every landlord in town will make us sign a five-year lease. We could really get stuck."

Note that these quick reactions were based on erroneous assumptions. It did not require much effort to find a sublet, and the firm did not have to sign a five-year lease. Nonetheless, some participants were so quick to criticize the administrator's thinking that they killed the idea before the group had a chance to develop it. After the first discussion, the administrator stopped looking for places that required sublets. But six months later, after looking and looking for a smaller office at a good rent, he remembered his original idea and pursued it.

Premature criticism is often inaccurate. And stifling. When ideas are criticized before they are fully formed, many people feel discouraged and stop trying. Furthermore, they may become unwilling to volunteer their rough-draft thinking at future meetings. They anticipate objections and keep quiet unless they can invent a counterargument. Thus, people learn to practice self-censorship. A group is then deprived of access to its most valuable natural resource: the creative thinking of its members.

SUSPENDED JUDGMENT
COMMON QUESTIONS AND ANSWERS

1. **How can I suspend my judgment if I truly do not agree with what someone else is saying?**

Suspended judgment does not imply agreement; it implies tolerance. You don't have to let go of *anything.* You're just making room for other people to express *their* ideas.
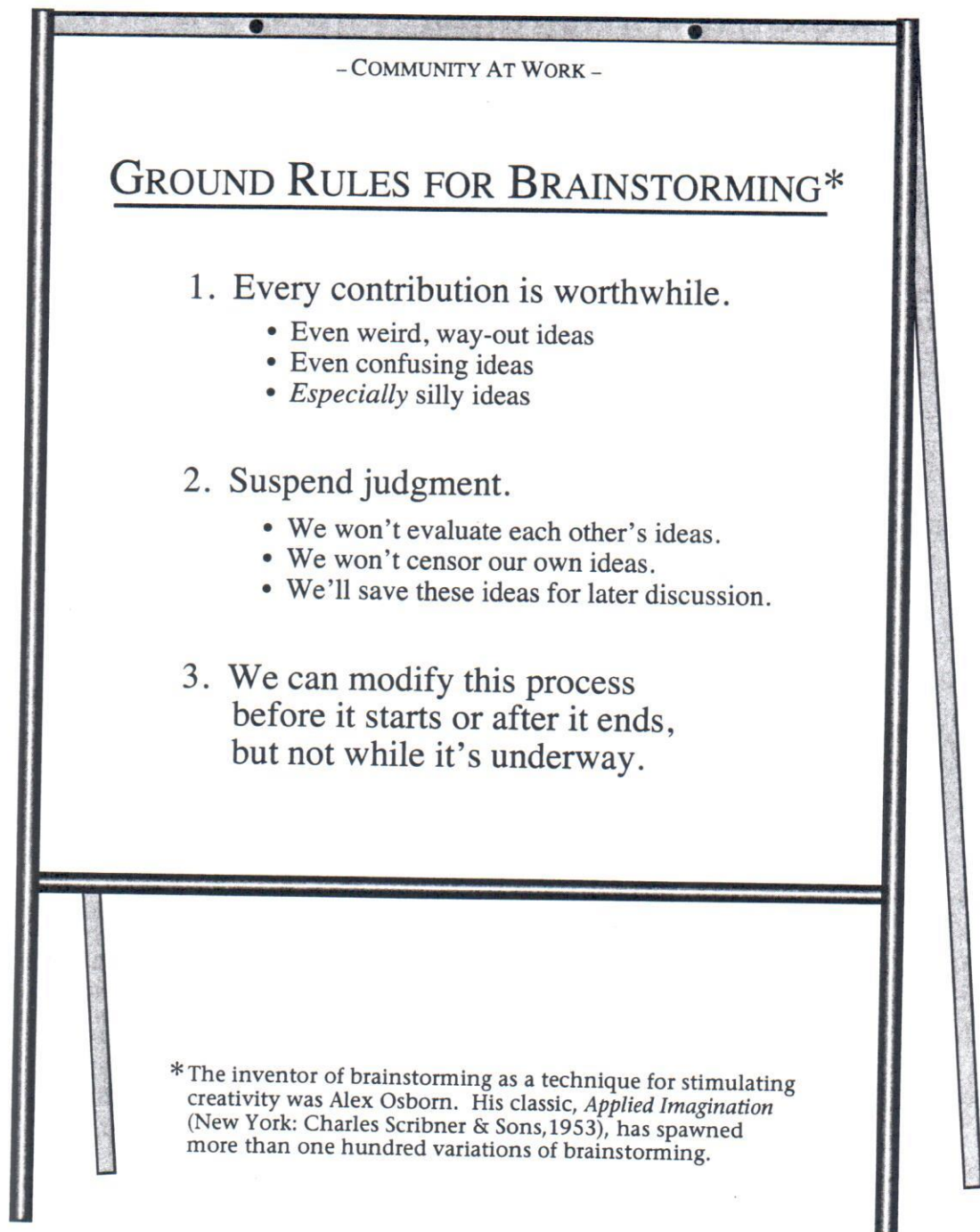
2. **What if I know that an idea won't work?**

Suspended judgment encourages people to use their creative imagination. This often produces impossible ideas. For example, "If we were all 20 feet tall, we could save lots of gasoline by walking more." Ideas like these can be the starting point for a new line of thought. You don't have to believe an idea is true; just let yourself try it on and see what your imagination produces. After all, "if humans could fly" was a crazy idea until the twentieth century.

3. **Isn't collecting silly ideas a waste of time? Wouldn't it be more efficient for us to focus on the realistic options?**

Suspended judgment comes into play precisely when the so-called "realistic" options have all been found lacking. In other words, creative thinking is the most efficient use of a group's time when nothing else works! Besides, what seems silly to one person may seem *innovative* to another.

4. **Doesn't suspended judgment produce chaotic discussions that go off in a dozen directions?**

Only if the process is handled poorly. To use suspended judgment effectively, the group should establish clear ground rules and a clear time limit. To paraphrase de Bono, informality in the content of a group's thinking requires formality in the structure of a group's approach to its thinking.*

5. **If I suspend judgment of an idea I think is wrong, how will I get a chance to critique that idea?**

Suspended judgment is *temporary,* not permanent. Most processes that call for suspended judgment are designed to last no more than thirty minutes. *Suspended* does not mean *abandoned.*

---

* Source: E. de Bono, *Lateral Thinking* (New York: Harper & Row, 1970), p. 151.

80

– COMMUNITY AT WORK –

GROUND RULES FOR BRAINSTORMING*

1. Every contribution is worthwhile.

- Even weird, way-out ideas
- Even confusing ideas
- *Especially* silly ideas

2. Suspend judgment.

- We won't evaluate each other's ideas.
- We won't censor our own ideas.
- We'll save these ideas for later discussion.

3. We can modify this process before it starts or after it ends, but not while it's underway.

---

*The inventor of brainstorming as a technique for stimulating creativity was Alex Osborn. His classic, *Applied Imagination* (New York: Charles Scribner & Sons, 1953), has spawned more than one hundred variations of brainstorming.

When introducing the technique of formal brainstorming to a group, spend a little time discussing the value of *suspended judgment.* Then ask each participant if s/he is willing to follow these ground rules. If one or more members are not, encourage the group to modify the ground rules to fit the needs of all members.

FACILITATOR TIPS FOR BRAINSTORMING

DO

- Do a lot of *mirroring* to keep the pace brisk and lively.

- Do remind people to suspend judgment. No critiquing allowed.

- Do treat silly ideas the same as serious ideas.

- Do move around to hold people's attention and boost the group's energy.

- Do encourage full participation: "Let's hear from someone who hasn't spoken for a while."

- Do repeat the purpose often: "Who else can explain why our office systems are so inefficient?"

- Do start a new flipchart page before the previous one is full.

- Do give a warning that the end is approaching.

- Do expect a second wind of creative ideas after the obvious ones are exhausted.

DON'T

- Don't interrupt.

- Don't say, "We've already got that one."

- Don't say, "Ooh, good one!"

- Don't say, "Hey, you don't really want me to write that one, do you?"

- Don't favor the "best" thinkers.

- Don't use frowns, raised eyebrows, or other nonverbal gestures that signal disapproval.

- Don't give up the first time the group seems stuck.

- Don't simultaneously be the leader, the facilitator, and the chartwriter.

- Don't start the process without clearly setting the time limit.

- Don't rush or pressure the group. Silence usually means that people are thinking.

THE WIDE WORLD OF BRAINSTORMING

Most groups use brainstorming for very limited purposes: generating solutions to a problem or creating new products. But brainstorming can be put to a much greater variety of uses. It can be used to help build lists of such things as:

- NEW GOALS

- UNDERLYING CAUSES OF A PROBLEM

- POINTS OF VIEW HELD BY PERSONS NOT IN THE ROOM

- UNEXPRESSED CONCERNS

- HELPFUL PEOPLE OR RESOURCES

- WAYS TO BUILD TEAMWORK

- NEW DIRECTIONS OF INQUIRY

- LESSONS FROM THE PAST

- OBSTACLES TO MEETING A GOAL

- WAYS TO IMPROVE HOW A MEETING IS RUN

- HIDDEN BELIEFS OR ASSUMPTIONS

- SOURCES OF INSPIRATION

Groups members' willingness to *suspend judgment* will probably free them to list ideas or perspectives they would not otherwise consider.

The Art of Asking Questions & Active Listening

Active Listening

- **BEHAVIORAL ASPECTS:** eye contact, head nodding, leaning in, open stance, focus on the person speaking only

- **REFLECTIONS:** of simple statements of what has been said, neutrally, to validate that it was heard and complete communication

- **PARAPHRASING:** longer paragraphs down to their essence

- **SUMMARIZING:** the points that have been made or activities that have occurred

OPEN OR CLOSED QUESTIONS?

Open Closed   Question

____ ____   1. Do you live in South Carolina?

____ ____   2. How long ago did you have your baby?

____ ____   3. How can I best be of assistance to you today?

____ ____   4. Did your physician talk to you about how your weight gain could affect your pregnancy?

____ ____   5. What do you like about your diet the way it is now?

____ ____   6. Have you thought about doing some walking your home?

____ ____   7. What do you think about the idea of doing some walking around your home?

____ ____   8. Aren't you concerned about your diabetes, too?

____ ____   9. Would you be willing to try this for one week?

____ ____   10. How have you managed your diabetes in the past?

____ ____   11. What are your most important reasons for making these changes?

____ ____   12. How many appointments did you miss last month?

____ ____   13. Would you be interested in hearing more about our program?

Write down some OPEN-ENDED questions you do use (or could use) as stock open questions when responding to an EMS-C Advisory Board member in a meeting:

Adapted from Bo Miller, MSW, and Robert Scales, Ph.D., based upon work by Miller and Rollnick, 1991.

Paragraphs to be Paraphrased in Dyads

<u>Directions:</u> Cut out A.1, B.1, C.1, etc. from a copy of this sheet. For each dyad, give a stack of A1 through G1 to one person, and the full copy of this sheet to the other. The first person with the stack reads the first one, TWICE SLOWLY, and then says #2 to the other person, who paraphrases. Switch so both get to practice.

A.   <u>READ THIS STATEMENT TWICE, SLOWLY</u>

1.   The mission of the MCH Bureau is to provide national leadership and to work, in partnership with States, communities, public-private partners, and families to strengthen the maternal and child health (MCH) infrastructure, assure the availability and use of medical homes, and build the knowledge and human resources, in order to assure continued improvement in the health, safety and well-being of the MCH population.

2.   In short: The mission of the MCH Bureau is [paraphrase the above]

B. READ THIS STATEMENT TWICE, <u>SLOWLY</u>

1. One of the points of facilitation is to get people to really participate a lot..... I mean it's not the kind of thing that everyone knows how to do right off the bat. You really have to have some experience, like you have to know where you're going with a facilitated meeting, so it's directive, yet you're not the executive director who decides it all. As a matter of fact, you don't really decide it at all, the group does.

2. So, facilitation is [paraphrase the above]

C. READ THIS STATEMENT TWICE, <u>SLOWLY</u>

   1. The EMSC program assists States in expanding and improving State and local capability for reducing and ameliorating pediatric emergencies in the State, taking special care to include children with special health needs, culturally distinct populations and historically underrepresented groups, including Native American/Alaska Natives, and Native Hawaiians; uses existing research-based knowledge, state-of-the-art systems development approaches, and the experience and products of previous EMSC awardees in meeting program goals; and generates support from local public and private sources for sustainability of funded EMSC projects after Federal support terminates, through State legislative, regulatory, or policy changes or other means.

   2. So what EMSC essentially does is [paraphrase the above]

D.　READ THIS STATEMENT TWICE, <u>SLOWLY</u>

　　1. There are so many things that go into managing a meeting well. You have to think of everything from food to copying – it's really burro work! There's nothing too jazzy about it, it's a long list of things that need to be taken care of ahead of time or else your meeting is going to flop. And don't forget about an agenda, you got to have that or things will just go all over the place, because you know how people love to talk.

　　2. So a key thing in managing meetings well is [paraphrase the above]

E.   READ THIS STATEMENT TWICE, <u>SLOWLY</u>

1. Required activities of NEDARC are to develop and maintain on-line information and educational material in the fields of data analysis and linkage, quality improvement and program evaluation, grant writing, patient confidentiality, HIPAA, survey design, and EMS data querying; and continue to maintain and upgrade a web-based infrastructure for the sharing of information and files between designated sites in separate locations.

2. So two required NEDARC activities revolve around [paraphrase the above]

F.   READ THIS STATEMENT TWICE, SLOWLY

1.   Getting people talking, now that's important. A facilitator isn't a lecturer; in fact he or she is all about the process. If your process has one person talking all the time, or nobody talking much, your facilitation is in big doo doo, it's time to bring out our facilitation tool kit, do something different! You've got to level the playing field, and then get people playing ball!

2.   Some key traits of good facilitation are [paraphrase the above]

G. READ THIS STATEMENT TWICE, <u>SLOWLY</u>

1. Experience has shown that the use of inspection reports by a grantee presents some unique challenges. Therefore, they must consult with NEDARC on the optimal method for collecting and analyzing data. With ambulance inspection reports as a data collection method, grantees can either review electronic data (individual reports or aggregated inspection results as long as aggregate data contains the detail necessary to determine whether each piece of pediatric equipment specified in this Manual was present or missing) or collect and review data from paper reports as based on the inspection cycle of the State/Territory.

2. Collecting and analyzing data around ambulance reports have two main methods: [paraphrase the above]

PRACTICING SIMPLE REFLECTIONS AND SUMMARIZING IN DYADS AND TRIADS

<u>A.   Dyads with someone you don't know (well): Simple Reflections</u>

1.   I'm feeling a little overwhelmed with information at this workshop.
2.   It's pretty awkward to reflect back almost exactly what someone says… I feel like a parrot!
3.   The food here has been incredible, I feel like I gained 5 pounds.
4.   I'm really motivated to recruit more people to my Advisory Board.
5.   I'm pretty disappointed that it hasn't been swimming weather; I rarely get to the ocean.
6.   It's been great to have so many different presenters here….. it keeps me awake!
7.   This whole thing of facilitation is really an art form.
8.   I've actually been surprised by how much methodology there is behind facilitation.
9.   There are so many things to think about before a meeting even occurs.
10. The posters they all put up really made me think.

<u>B. (Possible 2nd Dyad with someone you don't know (well): Paraphrasing</u>
See handout entitled "Paraphrasing")

<u>C.   Third Dyad with someone you don't know (well):   Summaries of the session so far</u>

Directions: One person gives a summary, and the third person writes it down. Rotate so both get a chance to practice summarizing, perhaps twice if needed.

TEN KEY ACTIVE LISTENING TOOLS
In MOTIVATIONAL INTERVIEWING

1.   THE SIMPLE REFLECTION

The simplest approach to responding to resistance is with nonresistance, by repeating the client's statement <u>in a neutral tone</u>. This acknowledges and validates what the client has said and can elicit an opposite response, or at least cause the client to feel heard and not judged for his/her statement.

Client: I don't plan to come to any educational groups your program has to offer.
Worker: You're not interested in coming to any of our educational programs. *OR*
                You don't think that education is what you need.

2.   REFLECTION (OR AGREEMENT) WITH A TWIST

A good strategy is to reflect what the client has said, but with just a slight twist or change of direction that moves the discussion forward and keeps possibilities open.

Client: I don't plan to come to any educational groups your program has to offer.
Worker: <u>Right now</u>, educational programs don't seem like what you need. ["What's the
                most pressing thing for you right now?" might be a good follow-up question
                after the reflection if you sense there's some pressing issue.]

This can also be done as an agreement when you're met with strong opposition or resistance.

Client: Why are you and my wife so stuck on my drinking? You don't know what it's like
                living with her; you'd drink, too, if she were nagging at you all the time.
Worker: You've got a good point there. Maybe I haven't been paying attention to the
                bigger picture here, I'm sorry; drinking problems <u>do</u> involve the whole family.

3.   REFRAMED REFLECTION

A good strategy to use when a client denies personal problem or is giving only negative information is reflecting what's being said by reframing it with a positive interpretation. This "acknowledges the validity of the client's raw observations, but offers a new meaning…. for them." (Miller and Rollnick, 1991, p. 107)

Client: My wife is always nagging me about my drinking; she is always calling me an
                alcoholic and is on me every time I pick up a beer. It really bugs me.
Worker: Your wife seems to really care about you and seems concerned, although it's
                expressed in a way that makes you angry. Maybe we can help her learn how to

tell you she loves you and is worried about you in a more positive way that works for you.

4. SHIFTING THE FOCUS

You can minimize resistance be helping the client shift the focus away from obstacles and barriers that may not have anything to do with the issue immediately at hand. Note that this is different from helping them problem solve, which may be helpful at an encounter with more time.

Client:	I can't stop smoking marijuana when I have another baby. All my friends do it, and it's the only way I have of relaxing, what with my toddler taking all my time up.
Worker:	You're way ahead of me! We're just setting up an appointment so you can <u>explore</u> family planning, and whether or not you <u>do</u> want another child. We're not ready yet to figure out how marijuana fits into your family goals. Why don't you bring that up with the family planner when you meet with her? Meanwhile, do you have any transportation or childcare issues with a meeting on this date?

5. REFLECT THE EMOTIONAL FEELING

You can really let a client know you're with him or her by reflecting the emotion that is behind the statement, rather than the content. Often, this will be an "Ah-hah!" experience for the client, who may be unaware of his/her feeling. A sign of the need for this reflection is a client who tells a lot of detail in a story, or tells the story over and over again as if you're not getting it.

Client:	First, I went to the store because we had nothing for breakfast, then I had to go home to get an important phone call, but then my son asked for something from the same store, so I had to back there before I made lunch for the younger kids, then I got everyone off to school, all before I came here for our 8:30 meeting.
Worker:	You sound really stressed out. You've put in quite a day before my first appointment with you; thanks for your effort in getting here.

6. AMPLIFIED REFLECTION

A good strategy to help a client with strong resistance move towards the possibility of change is to reflect the client's negative statement in an exaggerated form, <u>but neutrally, without sarcasm.</u> Usually, stating something in a neutral but extreme way brings out the other side of ambivalence (our tendency to have two very different feelings about something when we're in early stages of change).

Client:	I don't know why my husband rags me so much about my use of pot. I don't smoke any more than any of my friends, and it's a natural plant.

Worker: So your husband is worrying for no reason at all.

7.   SIDING WITH THE NEGATIVE

This strategy is very similar to an amplified reflection; by your taking the client's negative side of the argument, it tends to cause the client to express the other (positive) side of things, if s/he is ambivalent. Note: Be cautious in using this with a client you don't know well or one who is depressed. Also, never say that you as the worker don't think the person could change, reflect what the client has said.

Client: Well, I know you probably think I don't have a good diet, and maybe my arteries are going to harden some from the Kentucky Fried chicken I love, but I still don't think that makes much difference for me or my baby if I'm eating enough.

Worker: We've spent a lot of time now going over your concerns about your diet and some healthy options, but you still don't think you want to change your diet. Maybe changing would be too difficult for you, especially if you really want to stay the same. Anyway, I'm not sure you believe you could change, even if you wanted to.

8.   DOUBLE-SIDED REFLECTION

This strategy captures the ambivalence a client is feeling and normalizes it. Remember, ambivalence is feeling two different feelings at the same time about something (ambi = two; val comes from valor = value), which is a normal and necessary stage of ALL major behavioral changes (e.g., diet, alcohol, type of work, exercise, moving).

Client: I'm worried about what I read about processed sugar and weight gain I've had, but I love my Oreos!

Worker: On the one hand, you really love your cookies. On the other hand, you've got some real concerns about your weight gain and the health effects of processed sugar.

*Trick of the trade: When you reflect two feelings back to a client, end with the feeling you want to emphasize to them. For instance, if you're bringing out her (minor) negative feelings about a toxic issue, end on that. If you're trying to emphasize the possibility of change with someone who doesn't think she can make a change, end on that (e.g., "Although you say you're not feeling confident about losing 50 pounds, you actually did lose 5 pounds this past month").

9.   SUPPORT ONE'S ABILITY TO MAKE CHANGE

Many clients do not have a sense of their own ability to make change. They often find it difficult to believe they can even begin, much less maintain, a major behavioral change. To improve one's ability to change requires drawing out hope, supporting hope, being optimistic and stressing every accomplishment of change, no matter how small. This requires you to

recognize the client's strengths and bring these to the forefront whenever possible. Unless someone believes change is possible, the difference between the desire for change and the feelings of hopelessness about making change is likely to result in rationalizations about an issue or denial in order to reduce the discomfort.

Some general things that help:

a) Discuss how people in situations similar to him/her have successfully changed behavior.
b) Actually reflect back the word "change" whenever you hear it occurring in a client's story, and always in a positive manner.

Client: I actually did call one of those people you suggested last time, but not all of them.
Worker: You called one of those people on the list; that's the first time you've done that, that's quite a change.

c) For some people, information can be a motivator. It needs to be credible, understandable and accurate.
d) Separating the issue from the identity of the person is very helpful in sidestepping excessive shame and low self-esteem. this can be done by "painting the big picture." For example, one has risk factors for diabetes, which is a disease; we live in a society that supports unhealthy eating habits (e.g., McDonald's, all fast food, a fast-paced life, snacking as a cultural habit) and in a time when obesity is an epidemic in our country; alcohol and drug dependence are diseases, with biological and medical components; there is a strong history of sexism in our country that supports the unhealthy power dynamics of domestic violence. This does not abdicate personal responsibility about these conditions, but can alleviate unhelpful guilt and shame that impede change.
e) Emphasize and celebrate the small changes made, which will often be covered in self-deprecation or swept under the table as insignificant. Support taking things "one day at a time," as AA puts it, or "one pound at a time." The goal of motivational interviewing is small, incremental changes.

Client: Losing 2-3 pounds is nothing when I'm 60 pounds over weight
Worker: You actually lost 3 pounds! That's the first steps towards your goal, and we only
                reach our goals one step at a time. How long has it been since you've lost
                pounds rather than gained them? This is a big change!

Avoid giving a judgment as an authority figure, even a good one like, "That's terrific!" For that immediately implies you can give negative judgments, like next week if she arrives having gained backed 2 pounds, "That's terrible!" might be in her mind.

10.   IMPORTANCE AND CONFIDENCE SCALES

These two tools help the person assess her own readiness for change, while also giving you information that can affect your role and inform you about her stage of change.

a)   Importance Scale

Worker: On a scale of 0-10, 0 being not at all important and 10 being extremely important, how important is change in [whatever the issue is] to you?
Client: Oh, I'd say about a [5] [3].
Worker: What makes it a [5] [3] for you? [Then later, after reflections: What might bring it up from a 3 to an 8 or 9 for you?] [A response of a 5 should bring out strong ambivalence, which shows you s/he is still unsure about change]

b)   Confidence Scale

Worker: On a scale of 0-10, 0 being not at all confident and 10 being extremely confident, how important is change in [whatever the issue is] to you?
Client: Oh, I'd say about a [8] [3].
Worker: What makes it a [8] [3] for you? [Then, later, after reflections: What might bring it from a 3 to an 8 or 9 for you]

In general, low importance rating indicates there is much ambivalence. In general, low confidence rating indicates a person has a low sense of her ability to change and will need much support (see 8.a) about the possibility of change, particularly when coupled with high importance rating.

Options for achieving change should not be discussed until a client's self-ratings are between 7 and 10 in both importance and confidence. Also, be careful of giving too much information for anyone at this stage; usually, what's needed is the effort to help her see and then resolve her ambivalence first.

Notes prepared by Hilary Heyl, LISW. Added to and adapted from Enhancing Motivation for Change in Substance Abuse Treatment, TIP #35, William R. Miller, Consensus Panel Chair. US Dept. of Health & Human Services. Call 800-724-6686 for free copies.

Meeting Management

① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨

Leading High-Quality Meetings

Life Cycle of High Quality Meetings

Before the Meeting

HIGH QUALITY MEETINGS

During the Meeting

After the Meeting
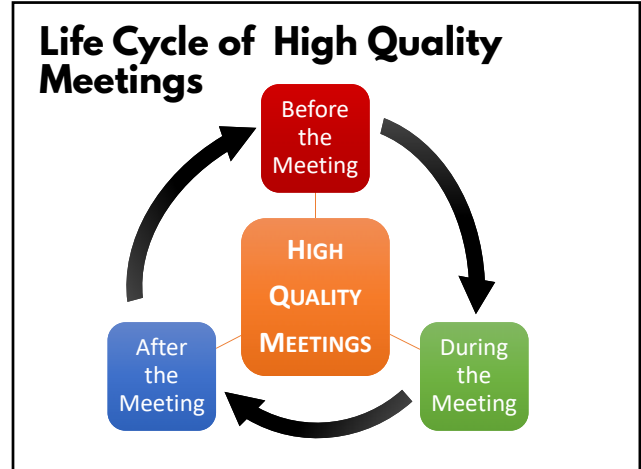
Objectives

1. Characteristics of high-quality meetings

2. Why teams should build emotional intelligence

Most research indicates that the amount of *time wasted* in meetings is between *30* and *60 percent*.

Do you routinely **only get** through **2** of **10** agenda items?

Does everyone **forget** what their **action item** assignments are for the **next meeting**?

It may be time to **rethink your** meeting **strategy**

What are your biggest meeting pet peeves?

What are characteristics of high-quality meetings?

Is a Meeting Necessary?

Discuss & *debate* something

Brainstorm ideas

Engage in *complex negotiations*

Build *camaraderie*

What needs to get done?

- Every meeting should have a *purpose*

- No purpose = *wasting time*

- *Do the math* next time you are in a meeting

Meeting Time

- The shorter, the better

Agenda

- A MUST!
- The agenda drives the meeting

Preparation

- Plan prep time in advance of the meeting

- Let attendees know what you expect them to do beforehand

Focus

- Focused meetings stay true to the stated purpose

Meeting Facilitation

- Who is in charge of the meeting?

- Every meeting benefits from having a facilitator

Switching Gears

- Many meetings are recurring w/ same team

- Building the emotional intelligence of the team can help with quality

What is Emotional Intelligence (EI)?

- **Awareness** of emotions and **ability to regulate** them

- Directed both **inward** and **outward**

What is Emotional Intelligence (EI)?

- **Personal competence:** aware of & regulating own emotions

- **Social competence:** awareness & regulation of others' emotions

Groups must be mindful of:

Emotions of groups or individuals outside its boundaries

It's own group emotions

Emotions of members
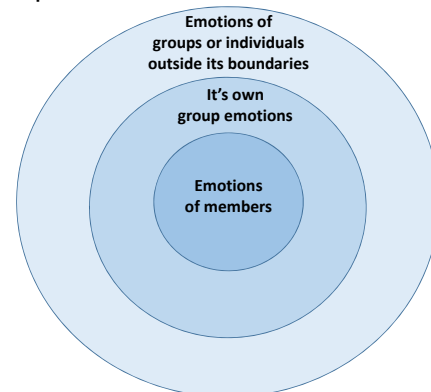
3 Essential Conditions for Group Effectiveness

- **Trust** among members
- A sense of **group identity**
- A sense of **group efficacy**

A Model of Team Effectiveness

Better decisions, more creative solutions, higher productivity

↑

Participation, cooperation, collaboration

↑

Trust, identity, efficacy

↑

Group emotional intelligence
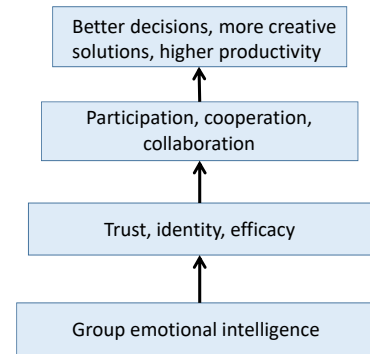
Teams Need EI Norms

- **Attitudes & behaviors** that become **habits**

- And **build** trust, **group identity** & **group efficacy**

Norms that Create Awareness of Emotions

- **Individual**
  - Interpersonal Understanding
  - Perspective Taking

- **Group**
  - Team Self-Evaluation
  - Seeking Feedback
- **Cross-Boundary**
  - Organizational Understanding

Norms that Help Regulate Emotions

- **Individual**
  - Confronting
  - Caring

- **Group**
  - Create Resources for Working with Emotion
  - Creating an Affirmative Environment
  - Solving Problems Proactively
- **Cross-Boundary**
  - Building External Relationships

Summary - Meetings

- Determine if meeting is necessary
- What is the purpose of meeting?
- Shorter meeting are better
- Agendas are the roadmap
- Prep & focus are key
- Facilitation keeps meeting on target

Summary – EI of Team

- EI = Awareness & regulation of emotion
- Both your own & others
- 3 Essential Conditions
  - Trust
  - Sense of group identity
  - Sense of group efficacy

Resources

- Conducting a Well-managed Meeting. American College of Physician Executives. Nov/Dec, 2011

- Leading Productive Meetings. Lynda.com. 1/3/2013.

- Building the Emotional Intelligence of Teams. Harvard Business Review. March 2001.

Life Cycle of High Quality Meetings
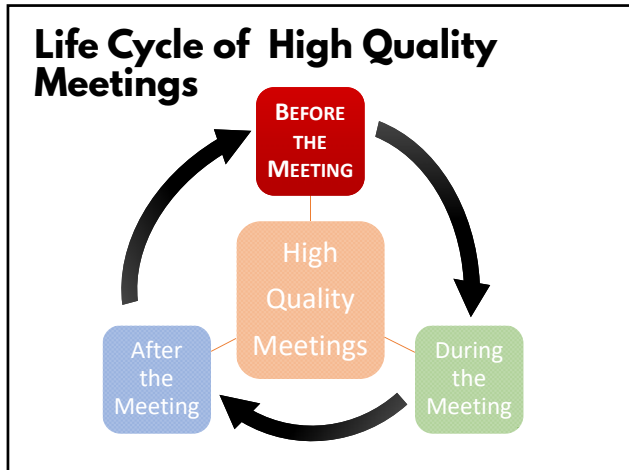
Before the Meeting

Life Cycle of a Meeting:

Objectives

1. Building an agenda

2. Participant preparation

3. Pre-meeting logistics

Every Meeting Needs a Facilitator

- Can be chosen by:
  - position
  - rotation
- Assign other roles
  - time-keeper
  - recorder/note-taker

Agendas

A must!
Agenda drives the meeting
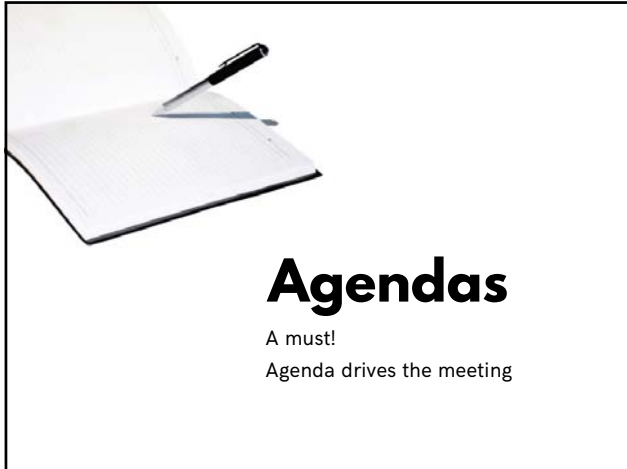
Three Components of Meetings

• Topics
• Outcomes
• Processes

Use these components to build your agenda!

Example

• **Topic** → Budget carry-over

• **Outcome** → How we will spend the money

• **Process** → Brainstorm & vote

Today's Agenda

1. Check-in

2. follow up on action items & agenda review

3. 2016 Budget Carry-over Request
    i.   How shall we use the carry-over money?
    ii. Brainstorm session for ideas/needs
    iii. Team vote
    iv. Action items (Diane will seek quote for new projector)

4. Second Major Topic
    i.   State meeting goal for this item
    ii. Describe the process to be followed
    iii. Proceed until goal is met
    iv. Identify action items

5. Next Meeting

Agendas

- Seek **input** from team

- Assign **time estimate** & **who** is presenting

- **Categorize** agenda items (define process)

Agendas

- Send out a few days **in advance**

- Consider a **bell-shaped agenda**

Bell-shaped Agenda

Prioritized, more time-consuming items

Brief, non-controversial items

Good news, unifying items
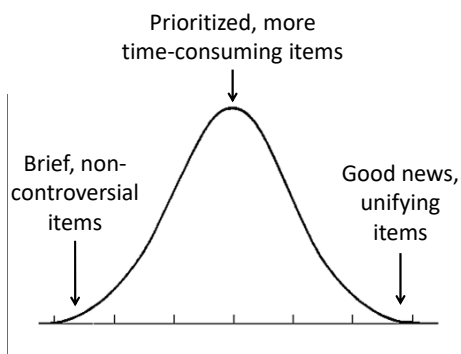
Participant Preparation

UNPREPARED

Participant Preparation

Let team members know **what you expect** them to do at the meeting **before** the meeting

Participant Preparation

Encourage team to **keep a list of tasks/ideas** for the agenda

Participant Preparation

Prepare list of **completed action items** from previous meeting

Participant Preparation

- Bring your **calendar**!

- Be prepared to **take notes**

Pre-meeting Logistics

Pre-meeting Logistics

- Size of meeting room

- Adequate seating

Pre-meeting Logistics

- AV needs – AV checklist on flash drive
  - Phone, in-person AV, web conference AV
- Acoustics

Pre-meeting Logistics

- Lighting, temperature, ventilation

- Refreshments ordered

Summary

• Agendas – 3 Components

• Participant preparation

• Logistics – go thru checklist

---

① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨

During the Meeting

Life Cycle of a Meeting:

Life Cycle of High Quality Meetings

Before the Meeting

High Quality Meetings

After the Meeting
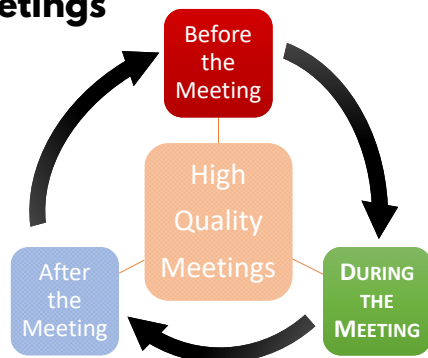
DURING THE MEETING

Objectives

1. Meeting Management

2. Boost Productivity

3. Helping if you aren't the facilitator

During the Meeting

• Start on Time!

• Check in/Ice-breaker
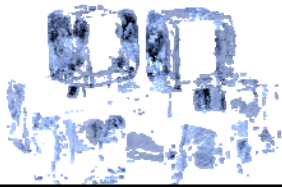
During the Meeting

• Explain purpose of meeting

• Review agenda

• Stick to agenda

MY FACE WHEN PEOPLE GO
OFF-TOPIC IN A STAFF MEETING
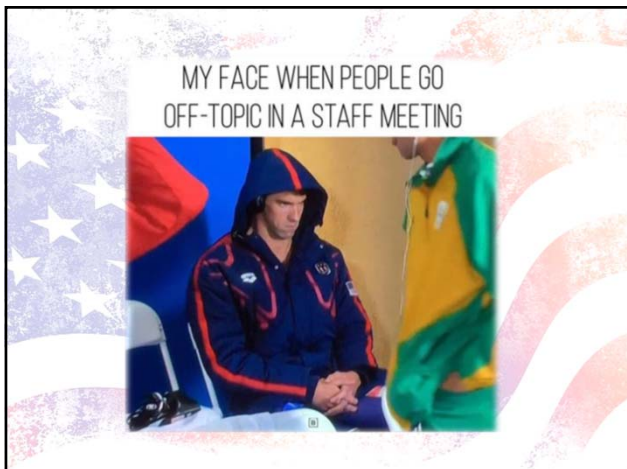
During the Meeting

• Opening the meeting

• Group norms/agreements

• Review action items from previous meeting

During the Meeting

- Focus on solutions

- Decisions over discussions

During the Meeting

Assign off-topic items to parking lot

Considerations for teleconferencing

At the beginning of meeting

- Roll call

- Ask participants' goal

- Create a name map

Norms for Virtual Meetings

- Ask participants to be as clear & concise
- Engage others with questions & offer your opinion
- Ask for clarification if needed
- Strive to stay focused; avoid doing other tasks

During the Meeting

- Review the purpose, process, and time frame
- Use names when presenting or commenting
- Make periodic process checks

End of Meeting

- Conduct a brief post meeting evaluation asking what worked and didn't work

Meeting Minutes

Meeting Minutes

• Taking minutes

• Note-takers → detail-oriented & fast

Meeting Minutes

• Focus on actions

• Keep track of action items & dates

• Use agenda to build note-taking document

Meeting Minutes

Agenda Item	Who	When
Review previous action items	• Diane will f/u with Tee • Craig set Advisory Board date	• By COB today • AB set for 4/21/17
Carry-over funds	• Brainstorm • Vote • Diane will get quote for new projector	• Staff • Staff • Before 2/14/17 staff meeting

Ending the Meeting

• Review action items

• Note-taker summarizes

•End on time (or early)

Ending the Meeting

- Date, time, location of next meeting

- Additional meetings

Summary – During Meeting

- Start on time, check-in, opening
- Clear purpose
- Review agenda
- Handling tangents
- Solutions/decisions

Summary – Minutes & Ending

- Focus on actions
- Keep track of who, what, when
- Review action items
- Date, time, location of next meeting

Boosting Meeting Productivity if You Aren't the Facilitator

Offer to Help Facilitator

- Collect agenda items

- Offer to facilitate

- Assist w/ logistics

Offer to Help Facilitator

- Redirect wandering discussions
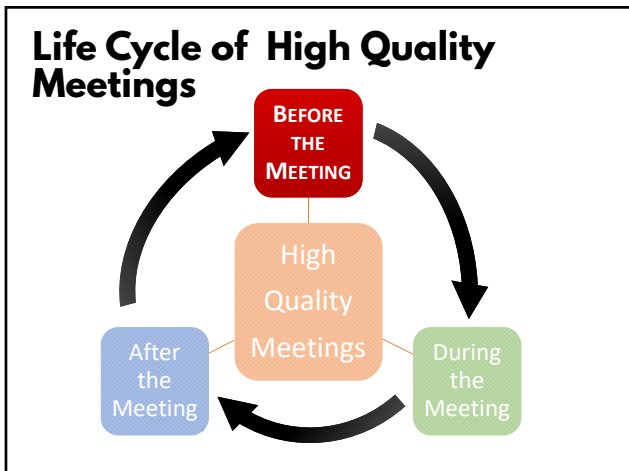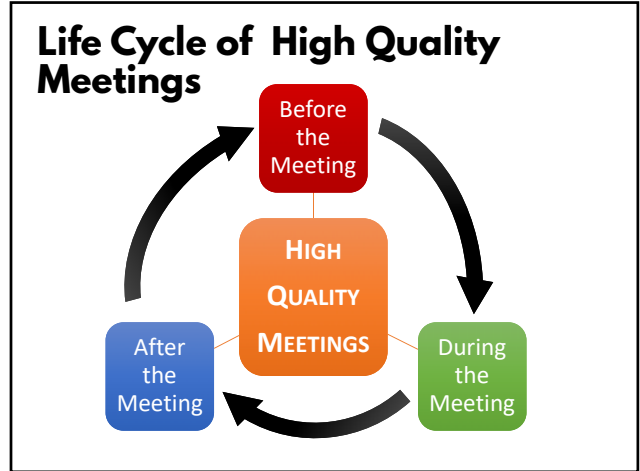
- Engage less vocal participants
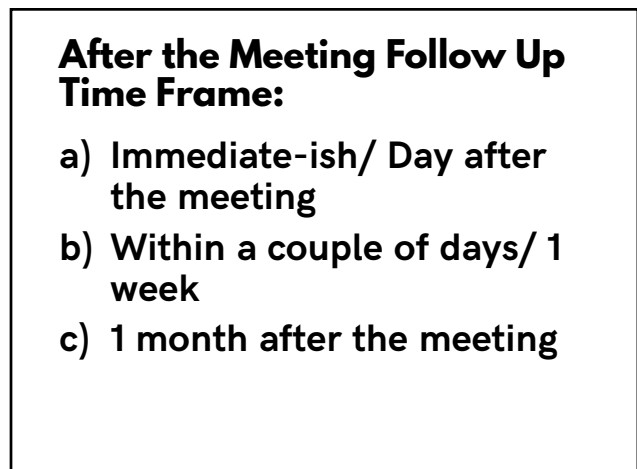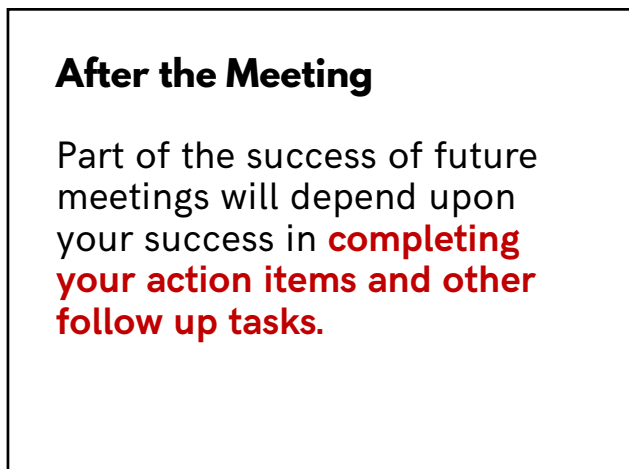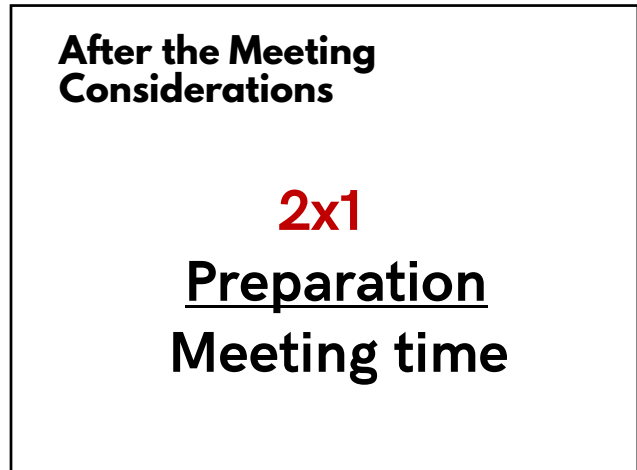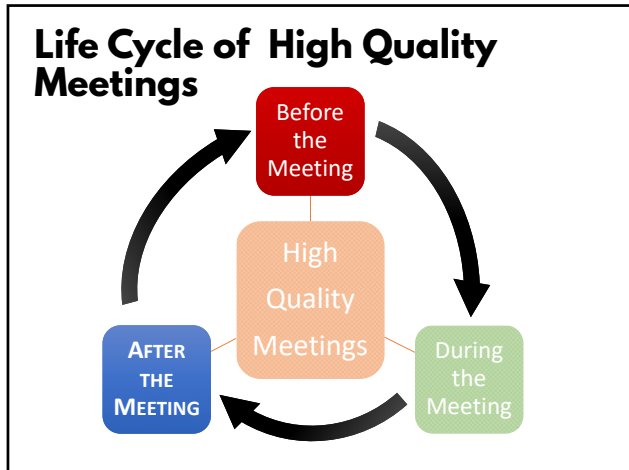
- Take notes

Resources

- Conducting a Well-managed Meeting. American College of Physician Executives. Nov/Dec, 2011

- Leading Productive Meetings. Lynda.com. 1/3/2013.

1 2 3 4 5 6 7 8 9

After the Meeting

Life Cycle of a Meeting:

Life Cycle of High Quality Meetings

- Before the Meeting
- During the Meeting
- After the Meeting
- **HIGH QUALITY MEETINGS**

Life Cycle of High Quality Meetings

- **BEFORE THE MEETING**
- During the Meeting
- After the Meeting
- High Quality Meetings

Life Cycle of High Quality Meetings

- Before the Meeting
- **DURING THE MEETING**
- After the Meeting
- High Quality Meetings

Life Cycle of High Quality Meetings

After the Meeting Considerations

2x1
<u>Preparation</u>
Meeting time

After the Meeting

Part of the success of future meetings will depend upon your success in **completing your action items and other follow up tasks.**

After the Meeting Follow Up Time Frame:

a) Immediate-ish/ Day after the meeting
b) Within a couple of days/ 1 week
c) 1 month after the meeting

Immediate-ish/ Day after the meeting

Meeting Minutes

- Go over the minutes and determine what needs to be done and who was doing it
- What do you need to do for the next meeting?

Meeting Minutes

- Summarize, type and send the minutes off

- What was decided?

- Who were not part of the decision but need to be filled in?

Look at Parking Lot Immediately

These are the questions that you said "I don't know the answer to that, let me get back to you"

Get back to them!

Importance of following up on assignments

Think of assigning projects of as a **yo-yo:** Whenever someone else commits to do something for you, you should also **create an action** for yourself so that you can follow up

After the Meeting Considerations

- Who was missing?

- When you call them back don't guilt trip the person. They may have been sick or had an emergency

Following Up after the meeting

- Use some sort of **tool**, digital or otherwise. To help you organize your follow up

- Keep yourself accountable

After the Meeting Considerations

- Create a **reminder** in outlook for the day after the task is due

- If they have accomplished the task you should **thank them** for getting it done

Within a couple of days/ 1 week

After the Meeting Considerations

Simple **checkup**, following up on an assignment

Ask if you can help!

After the Meeting Considerations

By regularly checking in, you'll give yourself the opportunity to make **small improvements** and adjustments over time
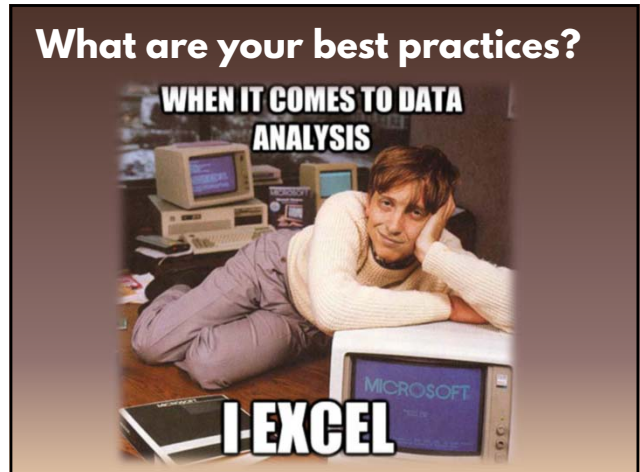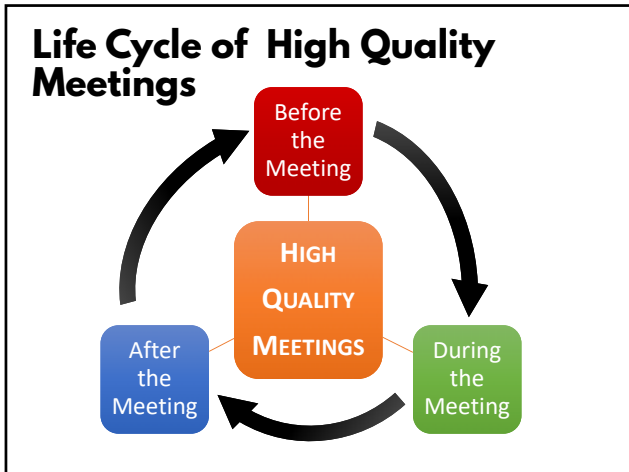
After the Meeting Considerations

- What happens if somebody did not complete the assigned task?

- Focus on the **obstacles**

- This puts the emphasis on the problem not the person

1 Month after the meeting
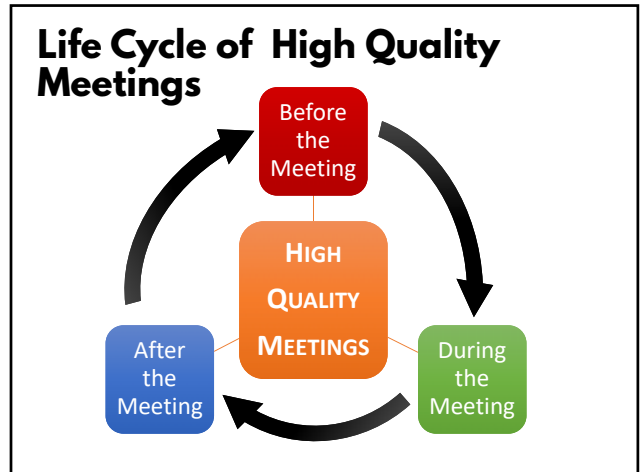
1 Month Follow up

- Are your meetings getting better? How will you know?

- Do you ever survey those who were at your meeting?

- Checking in and asking "what could we do to improve the **effectiveness** of these meetings?"

OF COURSE THERE WILL BE A MEETING

Life Cycle of High Quality Meetings

Before the Meeting

HIGH QUALITY MEETINGS

After the Meeting

During the Meeting

What are your best practices?

WHEN IT COMES TO DATA ANALYSIS

MICROSOFT

I-EXCEL

① ② ③ ④ ⑤ ⑥ ⑦ ❽ ⑨

Planning & Organization Skills & Tools

Life Cycle of High Quality Meetings

Before the Meeting

HIGH QUALITY MEETINGS

After the Meeting

During the Meeting

Overview

- Time Management
  Procrastination

- Time Management Skills
  Ways to get stuff done

- Project & Team Management Tools
  Review of free online programs

Procrastination

Time Management:

Images: Disney's The Grasshopper & the Ants

It's best to
PREPARE for the
FUTURE
so you are not caught
UNPREPARED

#DisasterPreparedness
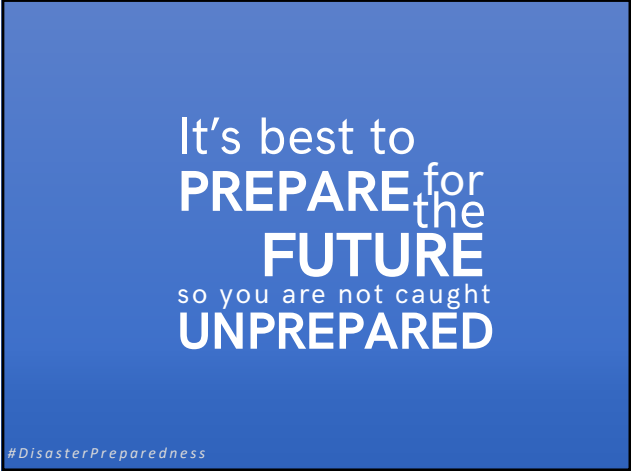
Why we procrastinate

It's usually tied to emotion

Fear of how hard it is to do

Discomfort that you don't want to do that kind of task

2 Types of Procrastination

NEGATIVE   **POSITIVE**

Negative Procrastination●

is pushing off tasks indefinitely – you have something scheduled or you know you're supposed to do something & you keep pushing it off

Positive Procrastination ●

is **COMMITTING** to future date – scheduling an appropriate amount of time to complete a task

Positive Procrastination frees up time & gives room to be prepared for emergencies

& helps us

focus

on the most valuable tasks

3 Tips to Overcoming Negative Procrastination

fool your mind & your body into taking action
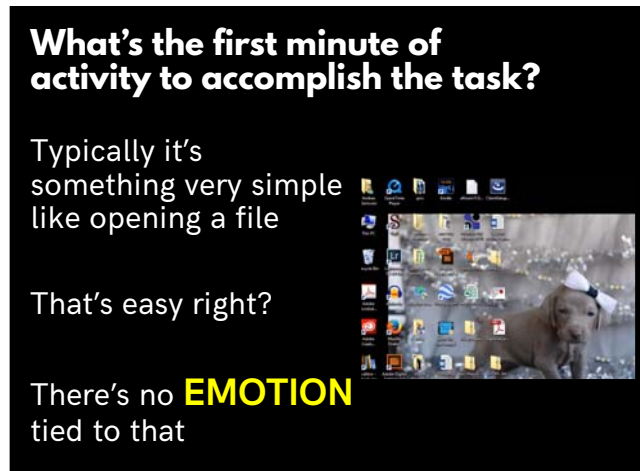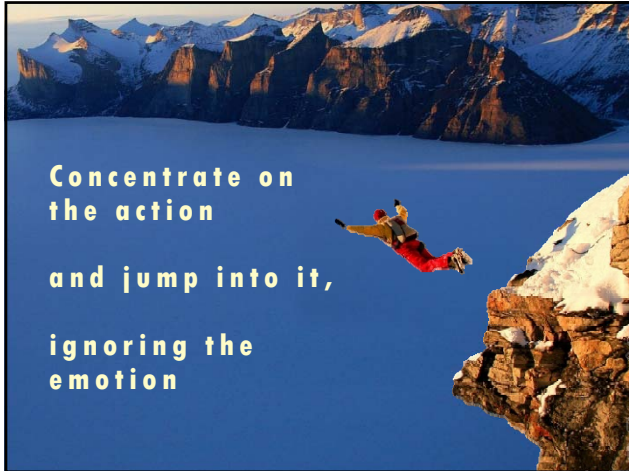
Ignore the emotion you're feeling before doing the task

Tip 1

Pay attention to the emotion you feel when you schedule tasks

Concentrate on the emotion you feel after completing tasks

Wow! That was a good thing

Concentrate on the action

and jump into it,

ignoring the emotion

PRE-crastination

Tip 2

Focus on the
FIRST MINUTE
of activity

What's the first minute of activity to accomplish the task?

Typically it's something very simple like opening a file

That's easy right?

There's no **EMOTION** tied to that

When scheduling put a note about the first minute of activity
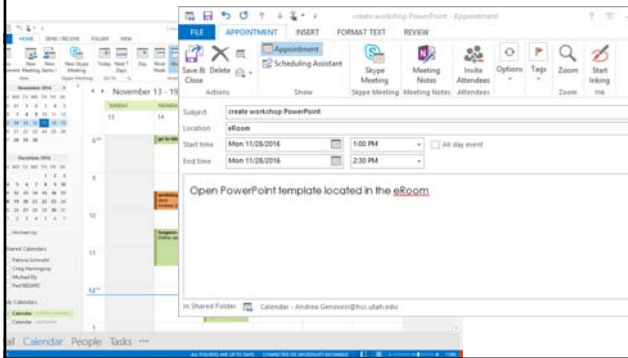
Answer "why" to justify the reason

Tip 3

WHY AM I SPENDING TIME DOING THIS?

The more often you take action & fight negative procrastination

YOU

- PROCRASTINATION

the easier it will be to overcome it

Ways to focus & get stuff done

Time Management Skills

Schedules vs Lists

Which is better?

1) Dream
2) Set goal
3) Action

To Do — Commonly used tool

To Do — that actually gets in way of

To Do — effective

To Do — time

To Do — management

Often list grows endlessly

To do

Call NEDARC about data collection

Get list of EMS agencies to NEDARC

Review and approve data entry portal

Send pre-notice to EMS agencies

Send email invitation to EMS agencies

Send thank you/reminder postcard To EMS agencies

Get list of non-respondent EMS agencies from NEDARC

Send reminders to non-respondent EMS agencies to complete survey

Leaving You Feeling Overwhelmed

Positive Procrastination to the Rescue

Replace to-do lists with a schedule

2017

## Convert your To-Do Tasks to Dedicated Time on your Calendar

To do

Call NEDARC about data collection

Get list of EMS agencies to NEDARC

Review and approve data entry portal

Send pre-notice to EMS agencies

Send email invitation to EMS agencies

Send thank you/reminder postcard
To EMS agencies

Get list of non-respondent EMS agencies from
NEDARC

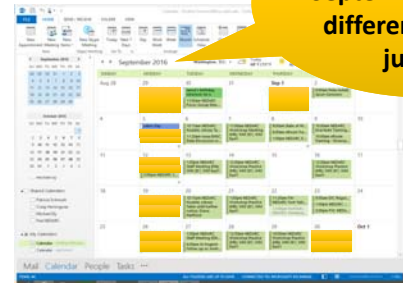Send reminders to non-respondent EMS
agencies to complete survey

2017

Call NEDARC

EMS list

Review portal

1

Send invite

Send reminder
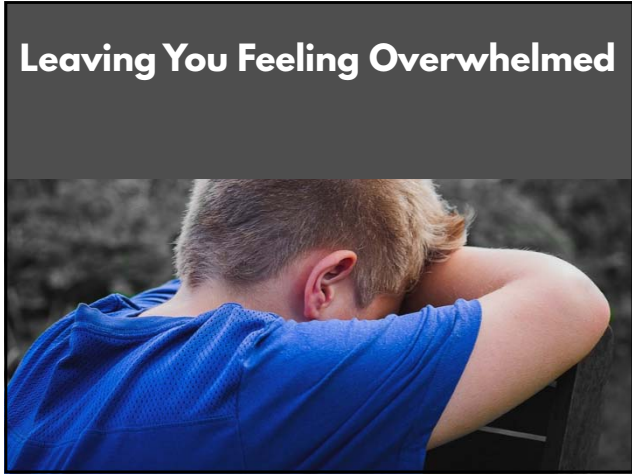
Establish 1 calendar & use consistently
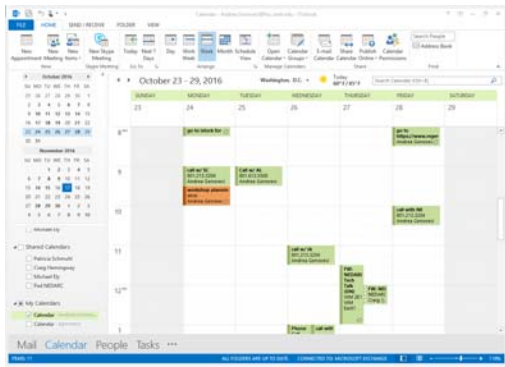
What tasks are scheduled for just you?

For the month of September, I had 12 different tasks for just me
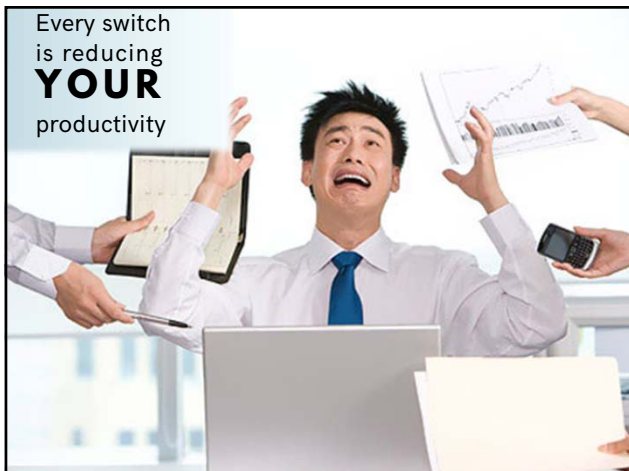

just you by YOURSELF working on a project

How many of those
TASKS
are scheduled for further than
90 days
into the future?

Most people have a short term perspective & only look at what can be done in the next 1-2 weeks

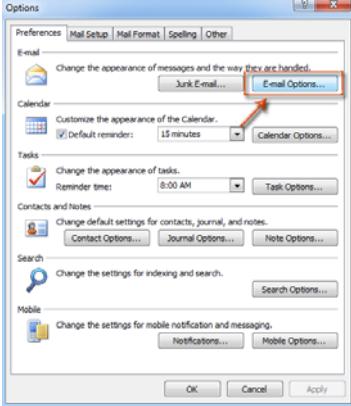COMING SOON

this perspective leads to a calendar crammed full of tasks

Schedule latest due date -5%

Commit to it when you put it in the calendar

Digital Interruptions

Has technology made us less productive?

I'd like to say technology is not the problem; rather our improper use of technology.

-Dave Crenshaw

lynda.com

Interruptions from computer & smartphones cause us to switch tasking

Every switch is reducing **YOUR** productivity

We need to use **TECHNOLOGY** *rather than being used by it*

Managing Digital Interruption Tips

Email

Turn OFF notifications

Set SPECIFIC times in the day to check email

Managing Digital Interruption Tips

Text or Instant Messaging

Use email rules if part of your job

For emergencies, establish policy within team

Managing Digital Interruption Tips

Social Media

Manage the push notifications
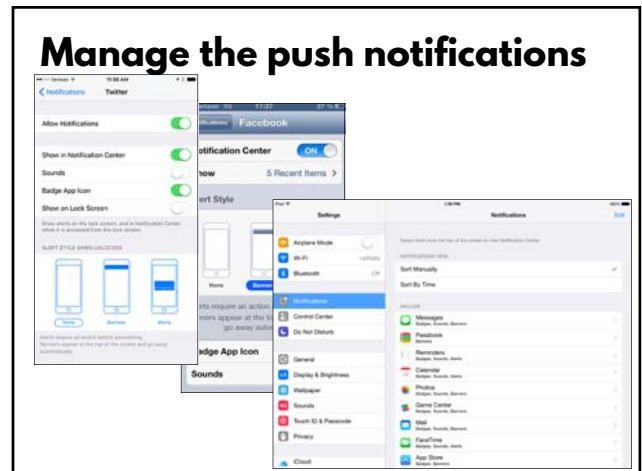
Manage the email notifications
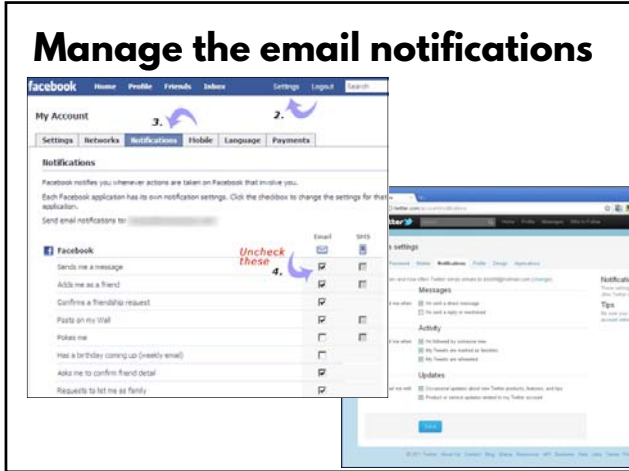
Project & Team Management Tools

Review of free online programs

Trello: Project Management Tool

Video tutorial on jumpdrive

Doodle: Group Scheduling Made Easy

Video tutorial on jumpdrive
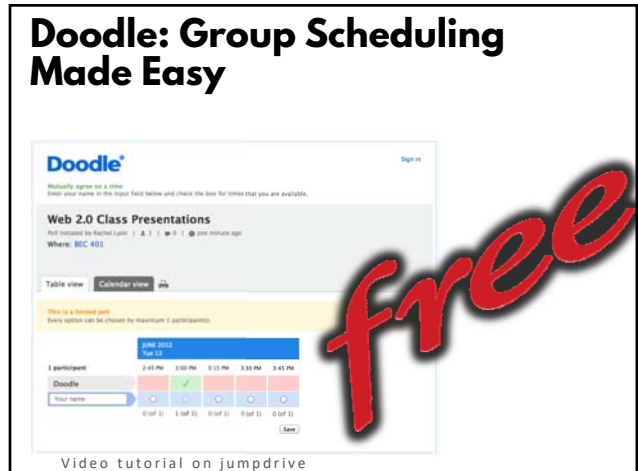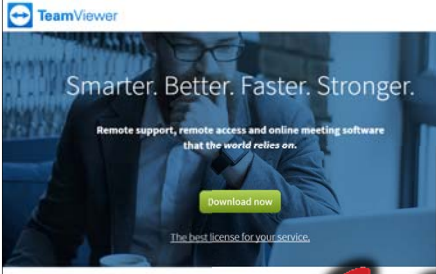
Join.me: instant screen sharing

- Easy to download
- No sign up
- No firewall settings

free

Video tutorial on jumpdrive

TeamViewer: online meetings

- Up to **25** people
- Some encryption
- Have to download it

free

Video tutorial on jumpdrive

GoToMeetings (free version): web conferencing

- Up to **3** people
- Some encryption
- Browser based

https://free.gotomeeting.com

Video tutorial on jumpdrive

Share your ideas!

What lifestyle changes do you plan to make in your work habits to help manage your time?

LIFESTYLE

PARTY

Date:

Where does My Time Go?

1. First, record your activities in half-hour increments for an entire day

2. Later, determine whether each activity was a priority 1, 2, 3, or 4. See the chart below

3. Finally, decided which activities deserve more of your time (Priority 1 & 2) and which deserve less (Priority 3 & 4). Make plans to spend more of your time tomorrow on Priority 1 & 2 activities

URGENT **IMPORTANT** **1**	**NOT URGENT** **IMPORTANT** **2**
URGENT **NOT IMPORTANT** **3**	**NOT URGENT** **NOT IMPORTANT** **4**

Time	Activity	Priority
7:00 AM		
7:30 AM		
8:00 AM		
8:30 AM		
9:00 AM		
9:30 AM		
10:00 AM		
10:30 AM		
11:00 AM		
11:30 AM		
12:00 PM		
12:30 PM		
1:00 PM		
1:30 PM		
2:00 PM		
2:30 PM		
3:00 PM		
3:30 PM		
4:00 PM		
4:30 PM		
5:00 PM		
5:30 PM		
6:00 PM		
6:30 PM		

Results

What activities deserved more time than was spent on them:

What activities deserved less time than was spent on them:

What is your change of behavior for tomorrow to manage your time more effectively?

Procrastinating Checklist End of Week Review

What to-do item(s) did I not get done this week?	Why Not?	How can I fix this?	Action Plan to get this done	Due Date

NEDARC

The National EMSC Data Analysis Resource Center