

Community Meetings & Workgroup Facilitation Skills



**DIANE ALTMAN DAUTOFF
WA SHIP/CHIP LEARNING COLLABORATIVE
JUNE 2, 2011**

Objectives

2

- **Identify key components of planning & designing a community meetings & workgroups**
- **Understand the primary responsibilities of the meeting facilitator**
- **Become familiar with characteristics of high performing teams**

Context

3

- **The *State or Community Health Improvement Plan* has a larger focus than the organization, and will involve partners in the assessment, planning, and development process, as well as in implementation of activities**

Questions to Answer

4

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

Designing the Meeting

5

Determine what's IN & what's OUT

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

Developing Meeting Content

6

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

Team Characteristics

7

When I think about the best team I have ever been part of, or observed, what were the characteristics that made the team so great?



Teams v. Work Groups

8

Teams

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

Work groups

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

High Performance Team Characteristics

9

- **Technical expertise**
- **Ability to work with others**
- **Willingness to deal with ambiguity**
- **Confidence to offer suggestions w/o regard to status**
- **Understand that team success depends on each member's contributions & working together**

High Performing Teams

10

- **Team learning requires practice**
A great play or symphony orchestra does not happen without practice
- **Teams learn by continually shifting between performance and practice**

Team Functioning



"The Five Dysfunctions of a Team" by
Patrick Lencioni,

Five Functions of a Successful Team

12

- 1. Trust each other**
- 2. Engage in unfiltered conflict around ideas**
- 3. Commit to discussions and plans of action**
- 4. Hold each other accountable**
- 5. Focus on the achievement of collective results**



Mike, Carmel, you go to the garden store and get five bags of lime. Dana, Gord, Jill, get me a tarp and carpet, then check Google Earth for a secluded stretch of highway. The rest of you, you'll help me bury the facilitator... who, ironically, has apparently just led the most successful team-building exercise in our company's history.

Proposed Ground Rules

14

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

Responsibilities of the Facilitator

15

The facilitator may plan the meeting and create the meeting agenda and materials

S/he is responsible for keeping the meeting focused and moving through the agenda.

S/he may also be the meeting scribe—writing key points on a flipchart or whiteboard as the discussion unfolds so that everyone can see them.

Responsibilities of the Facilitator

16

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

Additional Meeting Roles

17

Notetaker

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

Timekeeper

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

Meeting Management

18

Pre-Planning: Weeks in advance

- Clarify who needs to attend the meeting
- Be sure that a room is scheduled for the meeting
- If A/V is needed, check to be sure that it has been arranged
- If refreshments are to be served, check to be sure they are ordered
- Complete the meeting agenda
- Send out meeting reminder (date, time, location) & agenda; ask members to accept/decline meeting
- Check in with any invited guests, speakers who are scheduled to attend to see if they have written materials that need to be copied; verify the time they are on agenda and any needed equipment.

Preparing for Meetings

19

Pre-planning: Three days in advance

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

Day of Meeting

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

Preparing for Meetings

20

Day(s) after Meeting

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

Ongoing

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

Active Listening Do's

21

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

Active Listening Do's

22

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

Active Listening Don'ts

23

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

What comments or questions do you have?

24

