The Coordinated Services Team Initiative
Southern Regional Meeting

Advanced Team Facilitation Skills
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# Team Behaviors that Help

- Participate, volunteer
- Engage in open, honest communication – listen to understand; speak to understand
- Build on others' ideas
- Be optimistic/positive about team
- Be hard on the problem and soft on the people
- Provide leadership (when needed) without threatening formal facilitator
- Perform promised follow-up
- Be courteous, honest, trusting
- Use "we" expressions and thought
- Support each other
- Have a sense of humor (keep things in perspective)

# Team Behaviors that Hinder

- Be critical, negative
- Attack personally
- Agree with everything
- Avoid decision-making or closure through sarcasm
- Express futility, resignation, or helplessness
- Reflect boredom/don't pay attention
- Be close-minded
- Use "you" statements
- Don't communicate, cooperate, or participate
- Pre-judge ideas/others
- Don't listen/engage in sub-conversations

# Values Critical to Team Functioning

- Family-driven
- Strength-based
- Cross-system collaboration
- Team approach
- Use of natural supports
- Outcome orientation

## Collaboration with Parents and Youth

*"Nothing about me without me"*
Quote from the National Mental Health Recovery initiative

- **Voice:** The parent and youth have a voice in all decisions in the planning process

- **Access:** The parent and youth have valid options. No services are withheld for categorical reasons.

- **Ownership:** The parent and youth agree with and commit to any plan concerning them.

## Engagement Phase Tasks

- Begin building relationships
- Explain the collaborative team process
- Address safety and immediate needs
- Gather perspectives on strengths and needs
- Begin Initial Assessment Summary of Strengths and Needs
- Begin to identify an emerging sense of mission
- Identify, invite and orient team members
- Arrange initial collaborative meeting

## Abilities of an Effective Facilitator

Ability to:
- – Accurately listen
- – Communicate clearly
- – Develop trust of members
- – Understand multiple perspectives
- – Intervene on ineffective behavior
- – Accept feedback without reacting defensively
- – Provide support and encouragement
- – Maintain and demonstrate patience

## Content vs. Process

What is the difference between the two?

**Content:** The business of the team; what your team is working on.

**Process:** How team members work together; team members' interactions.

## Facilitating Content

- Factors that manage content:
  - Time and location
  - The setting
  - Maintaining time
  - Agendas
  - Rules of operation
  - Minutes

## Facilitating Content

- *Too much emphasis* on content can reduce discussion

- *Too little emphasis* will allow the team to drift without direction, reducing accomplishment

## Facilitating Process

Factors that manage process:

- Patterns of communication
- How decisions are made
- Mutual trust and respect
- Acceptance of differences
- Conflict management
- Team self evaluation
- Celebration

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## Facilitating Process

- *Too much emphasis* on process can delay task completion

- *Too little emphasis* can lead to imbalances of power and loss of participation and creativity

## How do I know there's balance?

*Observe Facilitation Roles*

| **Content Roles** | **Process Roles** |
|---|---|
| • **S**ummarizer | • **H**armonizer |
| • **O**rienter | • **A**nalyzer |
| • **F**act Finder | • **G**atekeeper |
| • **I**nitiator | • **E**ncourager |

## Preparing for the Collaborative Meeting

- Ensure all team members are aware of meeting time and location
  - Convenient time, location
  - Address possible barriers to attendance
  - Offer alternative means of participation
- Reserve meeting room
- Prepare materials
- Follow-though on commitments made at last team meeting
- Provide food

Source: The Team Handbook, Second Edition; Scholtes, Peter; Joiner, Brian; and Streibel, Barbara. 1996, Joiner Associates, Inc.

### Tasks of an Effective Facilitator

- Open the meeting, welcome members
  - Clarify members' roles, strengths, and goals
  - Establish Meeting Guidelines / Member Rights
- Review and add to the agenda, prioritize items
- Ensure notes are taken and plan for distribution
- Set meeting time limit
- Facilitate discussions and conflict management
  - Keep team focused, moving through the agenda
  - Ensure member participation
  - Identify "hidden agendas" and get them on the table
  - Recognize and reward creativity, flexibility, and volunteerism
  - Facilitate the decision-making process
- Evaluate member satisfaction
- Set agenda, time, and place of next meeting

### Examples of Meeting Guidelines / Member Rights

- Meetings start and end on time

- What's said here, stays here (confidentiality)

- No yelling

- Active listening – only one person talks at a time

- No "dump and run" – if you bring a problem or need to the table, you should stay and be part of the solution

## When to Use Different Decision-Making Methods

| Consensus | Voting |
|---|---|
| ● Use with small groups (10 or less)<br><br>● When decisions are important or affect a lot of people<br><br>●The group is informed and individual members feel a similar level of investment | ● When it is known that consensus is highly unlikely in the time allowed<br><br>● Members are equally informed on the subject matter and understand each others' viewpoints<br><br>● Have a plan for how to keep those who "lose" from becoming defensive |
| **Subgroup** | **One Person** |
| ● When the whole group is truly comfortable delegating their authority<br><br>● When the subgroup has the necessary information and expertise to make the decision | ● When it's an emergency<br><br>● One person has all of the relevant information<br><br>● One person is especially trusted to make a good decision<br><br>● The outcome only impacts the decision-maker |

Adapted from The Team Handbook; Sholtes, 1996

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## What is Consensus?

*Consensus is a decision in which all the group members find common ground.*

Consensus means:
– Everyone understands the decision and can explain why it's best
– Everyone can live with the decision

Consensus requires:
– Time
– Active participation of all team members
– Skills in communication, listening, conflict resolution and facilitation

Consensus does not mean:
– A unanimous vote
– Everyone getting everything they want
– Everyone finally coming around to the "right" opinion

Adapted from the Team Handbook, Scholtes, 1996

# Tips for Successful Consensus

- Listen carefully
- Encourage all members to participate fully
- Seek out differences of opinion
- Search for alternatives that meet the goals all members
- Avoid changing your mind only to avoid conflict
- Don't just argue for your point of view
- Balance power
- Make sure there is enough time
- Check understanding

Adapted from The Team Handbook; Sholtes; 1996

# Assessment Summary of Strengths & Needs
*Child and Adolescent Needs and Strengths (CANS)*

- Living situations
- Youth & family situation
- Trauma
- Mental, emotional, and behavioral health
- Physical health
- Developmental status
- Youth and family acculturation
- Child welfare
- Social and recreational activities
- Cultural and spiritual status
- Educational/vocational status
- Legal involvement
- AODA status
- Crisis response
- Youth strengths
- Caregiver needs & strengths

# Plan of Care Development

- The care coordinator schedules meetings with the team to develop the plan
- The team reviews process principles, and identifies the strengths of the individual and team member.
- The team reviews each domain, identifying strengths, needs, and the participant's current level of functioning.
- The team prioritizes the needs
- The team develops the Plan of Care to include:
  - The family and youth's present level of functioning
  - The goals, objectives and activities
  - Who will be involved
  - How services and supports will be paid for
  - How outcomes will be evaluated (as evidenced by…)

# Sharing and Monitoring Responsibility

- Determining tasks:
  - Solicit ideas without judgment – use the board
- Assigning:
  - This is done with the team
  - Look for volunteerism
  - Look for sharing in the work
  - Look for natural assignments
- Monitoring:
  - This is done with the team during meetings through review of the Plan of Care
  - Facilitator may need to check in with team members individually

## Collaborative Planning for Crisis

*"A crisis occurs when adults don't know what to do."* – Carl Shick

- Expect that an individual with multiple needs living in the community will experience crisis.
- Consider the most challenging act(s) that could happen
- Review historical strength-based information regarding strategies that have worked
- Pre-plan interventions with people and/or agencies who may be involved in the safety issue
- Develop a protocol of who will be notified, in what time frame, including responsibilities and communication procedures
- Establish a "blame free" time in which team members cannot fault each other for the crisis
- Develop a process for evaluating the crisis response plan's use within two weeks of the event.

## Facilitating the Collaborative Meeting Process: Closing the Meeting and Follow-up

- Closing the Meeting:
    - Summarize Decisions
    - Review action items and discuss "homework"
    - Schedule next meeting(s)
    - Evaluate the meeting
    - Thank meeting members
- Meeting Follow-up Activities:
    - Distribute meeting notes promptly
    - File agendas, notes, and other documents
    - Follow-through on activities

Source: The Team Handbook, Second Edition; Scholtes, Peter; Joiner, Brian; and Streibel, Barbara. 1996, Joiner Associates, Inc.
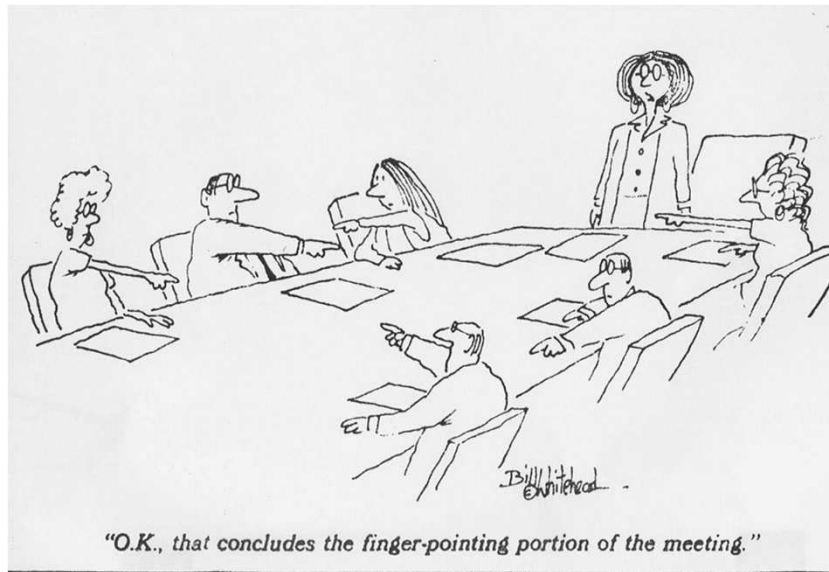
"We do not want to go to another team meeting!"

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# When are We Done?

- Outcome indicators demonstrate that goals are being met or in the process of being met

- Informal/natural supports are involved in ongoing support to the client

- Client has access, voice and ownership

# CONFLICT



"O.K., that concludes the finger-pointing portion of the meeting."

# Bias Self-Checklist

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# Approaches to Managing Conflict

Flight
- Denial
- Avoidance

Fight
- Tempers cloud rational responses
- Focus is on the person rather than the problem
- Little is accomplished
- Results in hurt feelings, or worse

## Approaches to Managing Conflict
### *Continued*

Confronting Conflict

- Stimulates the search for new information
- Provides a forum for people to share their perspectives and hear others' perspectives
- Understand that conflicts are not intrinsically good or bad
- View conflict as an opportunity

## Conflict Management Tips

Go to the balcony
- Know our hot buttons
- Talk to a mentor

Step to their side
- Listen
- Clarify position

Reframe
- Why?
- Why not?
- What if?

Adopted from William Ury

# Listening Skills

- To be heard and truly understood by another person is a gratifying experience and a rare privilege

- Try to react to ideas, not the person

- Most of us are taught to read, write and speak; few of us are taught to listen

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"In America, what's the opposite of speaking –


waiting to speak."

- Aaron Wolfe

## Principles for Conflict Management

- Encourage equal participation: we are in this together
- Actively listen: you are important and valued
- Separate fact from opinion: challenge categorical statements
- Separate people from the problem: use the board
- Focus on the big picture: reaffirm goals, principles, values
- Build consensus

Adapted from Conflict Management, Hendricks, 1989

## Communication Challenges

- People not talking to each other – (will talk to others)
- People not listening to each other
- People misunderstanding or misinterpreting what others say

> "Speak when you are angry and you will make the best speech you will ever regret."
>
> - Ambrose Bierce

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# Key Stages in
# Collaborative Conflict Management

**1. Identify and define the problem**
- Mutually acceptable to everyone
- Clear and simple
- Stated as a goal
- Separate from the search for solutions
- Separate the people from the problem

**2. Generate alternative solutions**
- Push creativity
- Prioritize

**3. Evaluate and select the alternative**
- Agree to criteria in advance
- Evaluate on basis of quality and acceptability
- Find a "bridging" solution
- Identify "Plan B"

Activity:
Walk through multiple
conflict situations

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