Team and Meeting Facilitation

Basic knowledge of leadership expectations for continuous improvement

Module 4

Online or single module version
Approximate time to complete: 30 minutes

Updated January 2016

COURSE INFORMATION

Title: Team and Meeting Facilitation– Module 4: Basic Knowledge of Leadership Expectations for CPI

Target Audience: Sharp HealthCare affiliated physicians, pharmacists, and other healthcare providers interested in continuous process improvement

Educational Objectives: Following this activity, learners should be able to:

- List the elements of a well-planned meeting
- Employ tools that will help make efficient use of time
- Solicit ideas and organize them with a group
- Determine appropriate decision-making processes

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Sharp HealthCare

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CME Credit: Sharp Healthcare designates this internet enduring activity for a maximum of **.5** *AMA PRA Category 1 Credits*™ after successful completion of the module with a minimum passing score of **100%**. Physicians should only claim credit commensurate with the extent of their participation in the activity.

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Cultural and Linguistic Competency: This activity is in compliance with California Assembly Bill 1195 which requires that all CME activities comprising a patient care element include curriculum addressing the topic of cultural and linguistic competency. The intent of this bill is to ensure that health care professionals are able to meet the cultural and linguistic concerns of diverse patient population through effective and appropriate professional development. Cultural and linguistic competency was incorporated into the planning of this activity.

Type of Activity: Internet Enduring Material with learning assessment and evaluation

Release Date: June 1, 2016 **Termination Date**: June 1, 2017

Requirements: Must pass learning assessment with 100% and complete evaluation to receive CME/CPE credit. **Estimated completion time**: 30 minutes

Hardware/Software Requirements: OS that supports modern web browser; Browser: IE 11; Google Chrome version 4 or higher; Safari version 10.8 or higher

Contact Information: Sharp HealthCare CME at cme@sharp.com

Tuition: None **Commercial Support:** None

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ASSEMBLY BILL 1195: As an accredited provider, Sharp HealthCare is required to comply with California Assembly Bill 1195, which states that all CME activities must address cultural or linguistic competency. At a minimum, cultural competency is recommended to include:

- Applying linguistic skills to communicate effectively with the target population.
- Utilizing cultural information to establish therapeutic relationships.
- Eliciting and incorporating pertinent cultural data in diagnosis and treatment.
- Understanding and applying cultural and ethnic data to the process of clinical care.

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Nurses and Pharmacists – Use Learning Center

CME Portal is for Physicians **ONLY**

Nurses will be awarded credits via the Learning Center.

Pharmacist credit will be addressed by the CME Department.

Physicians– Use CME Portal

1. Complete the Test/Quiz
2. Complete the Course Evaluation
3. CME Portal will generate a certificate for you – save for your records
4. CME credits will also be noted on your transcript

QUESTIONS?
Contact Heather Clemons, CME Department
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heather.clemons@sharp.com

Leading Performance Excellence

Lean Six Sigma basics for every leader

White Belt

#1 Introduction

LSS awareness, roles and responsibilities

#2 LEAN Basics

How we eliminate waste in our work

#3 A3 Daily Problem Solving

Reporting tool for resolving daily issues / defects

#4 Team and Meeting Facilitation

How we collaborate and engage talent

Yellow Belt

#5 Change Management

Assuring acceptance and accountability

#6 Project Management

Managing time and resources for continuous improvement

#7,8,9 DMAIC

'Six Sigma' How we reduce variation and Defects

#10 LEAN Thinking and Intermediate A3 Skills

How we eliminate waste and create flow

Yellow Belt Workshop

Hands on use of the tools and concepts

Looking forward to your next meeting?

Posted by: Jim Rose

"Aren't you glad we had this meeting
to resolve our conflict?"

Reflection:
"An effective meeting is 80 percent planning, 20 percent execution. Too often people spend most of their time in the meeting and the least amount of time getting ready for it. Plan better meetings. They don't just happen.“

-Tim A. Lewis ,Eddie Bauer

Course Objectives

At the conclusion of this module, participants should be able to:

List the elements of a well-planned meeting

Employ tools that will help make efficient use of time

Solicit ideas and organize them with a group

Determine appropriate decision-making processes

"Why do we take notes of meetings that last for hours and call them minutes?"
David Williams, British management author, presenter (b.1950)

Planning a Meeting

Why? **Executing a well-planned meeting will help you**:

Gain buy-in and support for future meetings

Move quicker to actionable results

Make better use of your resources' time

Create a motivating and more enjoyable experience

Reach better outcomes

Promote better support and engagement

How? **By adapting the following tools and methods where appropriate**

Agenda Topics

Meeting roles and responsibilities

Tools for collecting and managing ideas

Logistics

Decision making

Meeting Facilitation Tools

The following meeting tools will help you design a more effective and efficient experience. Each tool has a purpose and will aid the meeting facilitator.

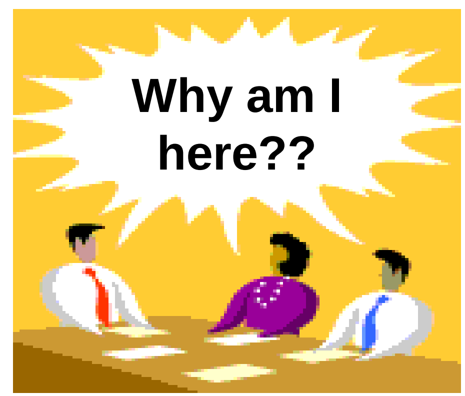
- ✓ **Agenda**: Have a plan for everyone's time and how to participate.
- ✓ **Icebreaker**: Great for new teams
- ✓ **Meeting Roles**: Solicit help for running the meeting
- ✓ **Ground Rules**: Establish rules and ownership for a successful meeting
- ✓ **Parking Lot**: Method for capturing stray topics and staying on topic
- ✓ **Fist-to-Five**: Quick way to check the group for consensus
- ✓ **WWW**: For keeping track of action items and accountability
- ✓ **Plus Deltas**: Obtain feedback to improve future meetings

Planning a Meeting

Lean Six Sigma

Consider the following items to include on your agenda:

- ❑ Title, Date, Location and Meeting Purpose
- ❑ Reflection (Sharp Experience Tradition) or Safety Moment (HRO)
- ❑ Ice Breaker and Introductions
- ❑ Create or add to Ground Rules
- ❑ Discussion topics with allocated time
- ❑ State the desired outcome (Make a decision, have a plan, find a solution, etc.)
- ❑ Next steps
- ❑ Review Parking Lot
- ❑ Review WWW (Who, What and When)
- ❑ Time for recognition
- ❑ Plus Deltas



Provide agenda copies to everyone or for less formal meetings use white board

Meeting tips:

Including the following will help your participants to better participate and contribute to a successful meeting

- ❑ Provide clear purpose/deliverables for the meeting
- ❑ Specify timeframe for each topic
- ❑ When possible it is best to send out agenda in advance
- ❑ As part of the invitation for ongoing meetings, ask that a representative be sent in the event one cannot attend.
- ❑ For reoccurring meetings, the group can create an agenda by brainstorming current issues/barriers
- ❑ Anticipate problems and diversions, have back-up plan(s)

"Every discussion in a meeting has a diminishing curve of interest. The longer the discussion goes on, the fewer people will be interested in it."
Mark McCormack, US sports agent

The Ice Breaker

Why plan an Ice Breaker to start your meeting?

- Create a positive group atmosphere
- Help people to relax
- Break down social barriers
- Energize and motivate
- Help people to think outside the box
- Help people to get to know one another
- Help set the tone for the meeting

✓ **Tip: Select the icebreaker based on size of group, time available, team phase, politics and personalities**

The ice breaker is good to consider, however is not always necessary. Try to keep it to a quick ice breaker with a new group, but then can loosen up or go deeper during later meetings.

For Ice Breaker ideas see toolkit link HERE

Ground Rules

Establish Ground Rules for your meetings in order to:

- Shift the focus from facilitator to team
- Determine how the team will interact and participate
- Reference as needed to maintain a productive meeting

✓ Ask the team members to suggest "Ground Rules" for 'Their' meeting.

✓ What rules do we need to establish for a successful meeting?

  – Rules on how the meeting will be run

  – Rules on what behaviors are acceptable/unacceptable

✓ Write them on a wall chart for everyone to see

✓ Include them on future agendas

✓ Can be added to or changed later

Ground Rules can address:

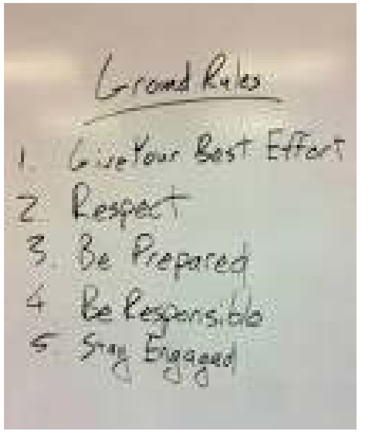
- Attendance
- Phones/Pagers
- Breaks
- Promptness
- Participation
- Conversation Courtesy

Ground Rules

✓ Tip: As facilitator, you can start the brainstorm by suggesting ground rules like: "Start and end on time" and "have fun!"

Examples:

- ❑ Start and end on time
- ❑ No/limit sidebar conversations
- ❑ Everyone participate
- ❑ Vegas Rules (Do not repeat what is said outside the room)
- ❑ Take phone calls outside
- ❑ Phones on silent mode
- ❑ Attend meetings or send a representative



See tool kit link HERE

Examples for Conference Calls

- ❑ State your name before you make a comment
- ❑ Ask participants to place phone on mute when not speaking

  *6 to mute/unmute (at Sharp)
- ❑ Remind participants to not place call on hold (hold music/message will interfere with conference call)

Meeting Roles

Assign meeting roles to your participants. Not only so you can get help, it increases participation and meeting ownership.

Facilitator(s)

- Keep moving group towards its objective
- Run the facilitation tools for the Team Leader

✓ **Tip: Don't facilitate and scribe at the same time**

Time Keeper

- Monitor agreed-upon timeframes
- Reminds Facilitator or Leader when allotted time being reached

Scribe

- Record ideas and actions verbatim; takes direction from Facilitator
- Use of wall charts vs. private minute-taker to make content visual to the team

Process Checker

- Maintain focus on agreed-upon processes

See tool kit link HERE

Types of Decision Making

Determine up front what type of decision making will be used and <u>let the participants know</u>. This will help manage expectations!

- Authoritative: “I would like your input so that I can make a decision”
- Majority Rules: “We will vote and go with the majority”
- Consensus: “We will need everyone’s support with the decision”
  - In other words, all participants:
    - Have been heard
    - Will support the decision
    - Are ready to move on
    - Don’t have to agree it’s the very best

✓ **Tip: Include in the Ground Rules how decisions will be made**

Use the process “Fist to Five” to see if you have reached consensus!

Fist to Five - Consensus

Great tool to use to keep a meeting moving forward.
Whether you want to confirm that everyone is on the same page or to check and see if further discussion is necessary.

See Toolkit Here

How it works

1. State the question with the options of yes or no
   Yes, I can support or No, I am against this.
2. Explain the importance of consensus for the group decision
3. Explain what each hand number means:
   5 fingers = Best
   4 fingers = Good
   3 fingers = Okay

   If everyone has 3 or more fingers, this means you can move on and they will support the decision.

   2 fingers = Needs more discussion
   1 finger = Not good
   Fist = Totally against

   If anyone has 2 or less fingers, this means you can not move on and need further discussion.
4. Make adjustments if necessary and repeat ‘Fist to Five’

WWW (what, who and when)

Identifying work to be done is often the output of a meeting.

Capture action items right away on a large wall chart for everyone to see.

Don't wait until the end of the meeting to assign a name and completion date!

Label the top of a wall chart or white board with:

- **What**: Make sure there is clear understanding of what needs to be done.
- **Who**: Action Owner (only assign to those present in the meeting)
- **When**: Agree upon a date the action will be completed by.

Review the WWW at the end of the meeting for missing dates and assignments

See Toolkit Here

Tip: Email the WWW sorted by people so at a glance each person can see their actions due

WWW can be used in addition to or in lieu of meeting minutes, capturing discussion, and/or decisions.

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Parking Lot

This tool is used to carefully take off-topic conversations and to capture them on a list for future review.

- ✓ Acknowledge to the participant that the topic is a good one, however not the current focus and will be captured in the 'Parking Lot'
- ✓ Scribe the topic onto a wall chart or white board 'Parking Lot'
- ✓ **By the end of the meeting** check to see that all 'Parking Lot' items have been addressed or ask team what actions items should we add to the WWW to address at an appropriate time.
- ✓ Be sure to review and assign an action at the end of the meeting, otherwise participants will view the Parking Lot as a trash can.
- ✓ Don't let it dangle or drop

See tool kit link HERE

Plus - Deltas

+ Δ

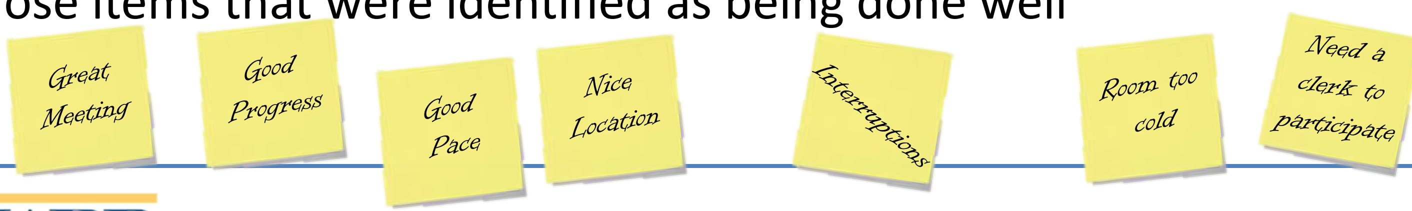
Lean Six Sigma

This is an exercise completed at the end of every meeting for participants to share what was positive about the meeting and what should be improved. It provides great feedback to the Facilitator and team.

How it works

1. Have post-its handy for participants to use at the end of your meeting.
2. Ask everyone to write one thought per post-it
   - Plus: What we should continue doing
   - Deltas: What we should change or improve upon
3. Post the ideas on a wall chart or on the door labeled with + and Δ
4. After meeting review +/Δ's – Use information in planning the next meeting
5. At the start of next meeting – Review Δ's first noting changes made based on suggestions. Next review the +'s with a commitment to repeating/reinforcing those items that were identified as being done well

See Toolkit Here



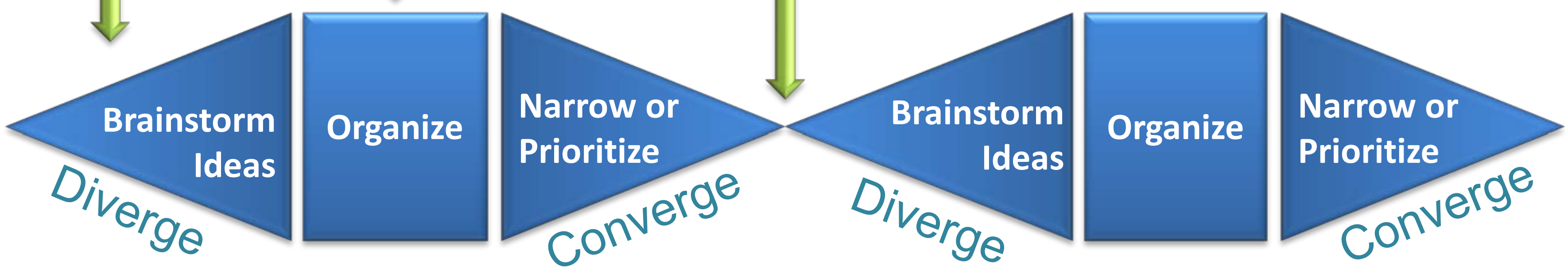
SHARP

Management of Ideas

Next we will review several tools that you can use to engage teams in sharing their ideas and expertise. It is amazing how much can be accomplished in a short period of time using these tools.

Once you have collected many ideas, you will want to organize them so that you can select what the team wants to work on. Don't let the alternative be a meeting with endless circular discussions with little or no resolution.

After using these tools to select the top Issues and barriers, repeat to brainstorm and prioritize solutions.



Issues, Barriers & What's Working

Solutions

It is better to have enough ideas for some of them to be wrong, than to be always right by having no ideas at all.

-Edward de Bono

Brainstorming

Common group technique for generating many ideas in a short period of time

See Toolkit Here

How it works:

- Clearly state the topic and guidelines
  – the wording should encourage specific, tangible ideas
  – not abstract ideas or opinions
- Remind team of brainstorming rules below. Pick one of 4 methods
- End session when ideas stop or when time expires

No evaluation of ideas
Encourage wild ideas
Build on ideas of others
Quantity of ideas
No discussion of ideas during brainstorming
Record all ideas
One thought/concept at a time (per sticky)

Brainstorming Methods

4 different types

<u>Freewheeling:</u>

- Participants call out ideas spontaneously and the Scribe records
- Best when all participants are assertive and group is high performing

<u>Round Robin:</u>

- Participants call out ideas in turn, until everyone run out of ideas
- Good when you want to get everyone involved
- Not good if there are a few experts and several say “pass”

<u>Silent:</u>

- Participants write ideas on Post-Its and pass to Facilitator or post
- Good when there are hierarchical issues or passive members
- Can be done prior to a ‘Round Robin’ report out of ideas

<u>Channel:</u>

- Pre-defined categories to use as springboard to generate ideas
- Good for complex topics that need to be broken down

Channel Brainstorming

Gallery Walk: Technique to obtain many ideas from a large group in a small amount of time

How it works

- Set up flip chart stations around the room with predetermined topics for channel brainstorming
- Break into small groups (3-5) with a different group starting at each station
- Brainstorm ideas, write on Post-Its and post on flip chart
- Rotate groups every 3-5 minutes until each group has been to each station
- Upon returning to the first station, the team can organize the results and report out

Affinitizing / Grouping

Categorizing Ideas

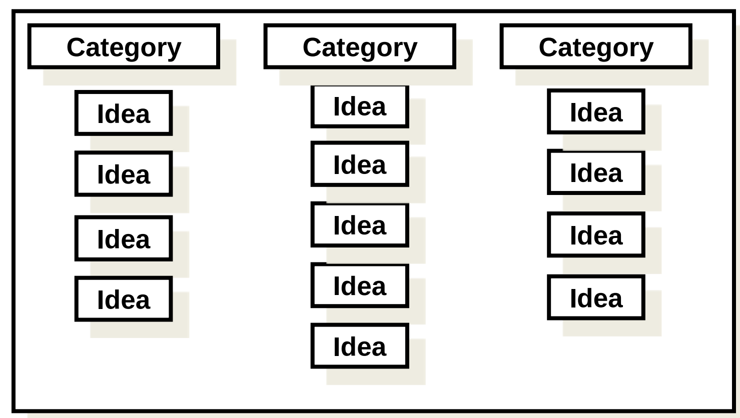
When organizing ideas, know what your next step is:

✓ Are you looking for unique ideas to do further work with?

- Ask team members to combine like ideas.
- Ask team to skip repeated ideas when collection using Round Robin.
- Ask team for clarification as needed.
- Do not categorize if you plan on voting on specific ideas or move individual ideas onto the next tool.

✓ Are you looking for themes as focus areas to work on?

- Review ideas, clarify as needed and move ideas to their natural category.
- Create “headers” for each category.



Narrowing

Control and Influence Assessment

Tool to assist team in focusing on issues that are within their authority and scope to implement change

Work on these

How it works

- Label a wall chart with:
  ‘In Our Control’
  ‘Within Our Influence, and
  ‘Out of Our Control’
- As a group, agree on whether or not an idea (or group of ideas) is something that the team has the ability to change
- Discuss areas where team has disagreement, move to consensus

See Toolkit [Here]()

Narrowing

Voting

Perhaps simple voting will do to reduce a large amount of ideas to a more manageable number

See Toolkit Here

Process:

- Determine the number of votes per person
- Vote for high priority ideas, most important items
- The ideas with the most votes/highest rank become the focus

Tips:

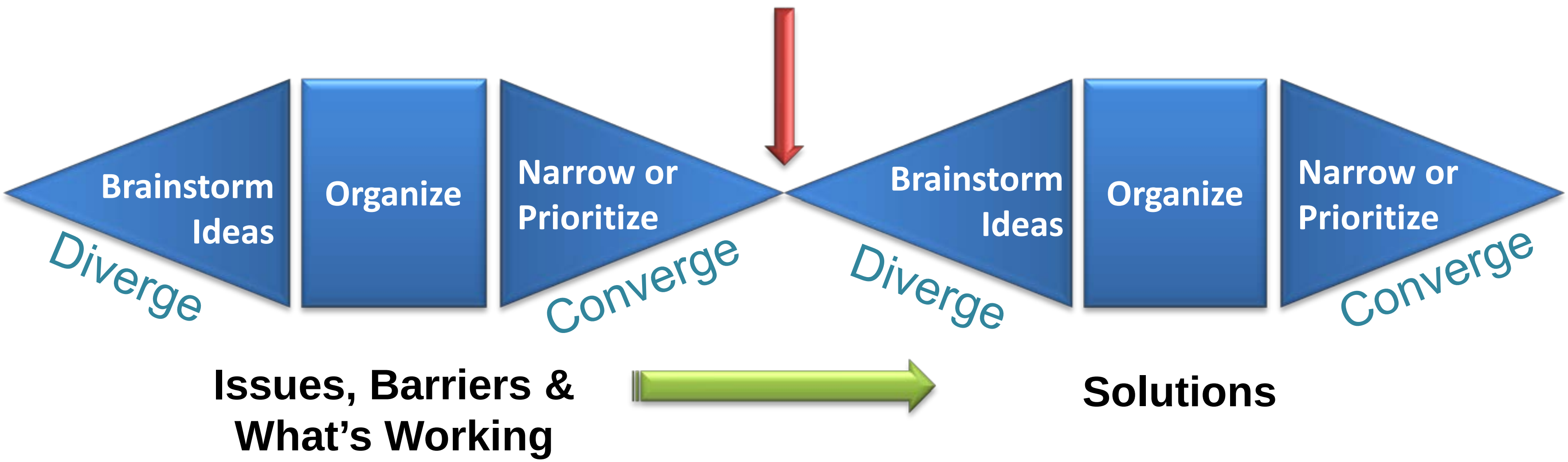
- Typically start with 5 votes per person
- Consider allowing/restricting participants to vote for an item more than once
- Be sure all votes are used
- Be sure to clarify items and eliminate duplicates before voting
- Consider using multiple rounds to whittle down a large list

Moving to Solutions

Depending on time, resources and criticality, determine how many of the top issues and barriers to focus on.

Now that you have identified the top issues and barriers, repeat brainstorming to get to solutions.

Select the brainstorming method, Categorize when it make sense and Narrow by voting. Additional tools: Priority/Payoff Matrix and Decision Making Matrix.

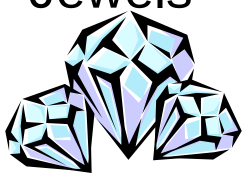
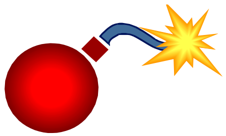


Prioritizing Solutions

Priority / Payoff Matrix

Once the list of solutions has been narrowed to a more manageable number the team needs to determine how to proceed. This tool helps to surface solutions with a higher impact.

Work on these

Impact	Easy	Difficult
High	"Jewels" 	"High-Hards" 
Low	"Low-Hanging Fruit" 	DROP 

Effort

This tool can save valuable time by identifying ideas that have little payoff and/or require significant effort.

See Toolkit Here

Ask team to place their solutions on a wall chart marked with the four zones. If you are looking for actions for a 30-90 day WWW, high impact and low effort might be the type of solutions you are looking for!

Decision Making Matrix

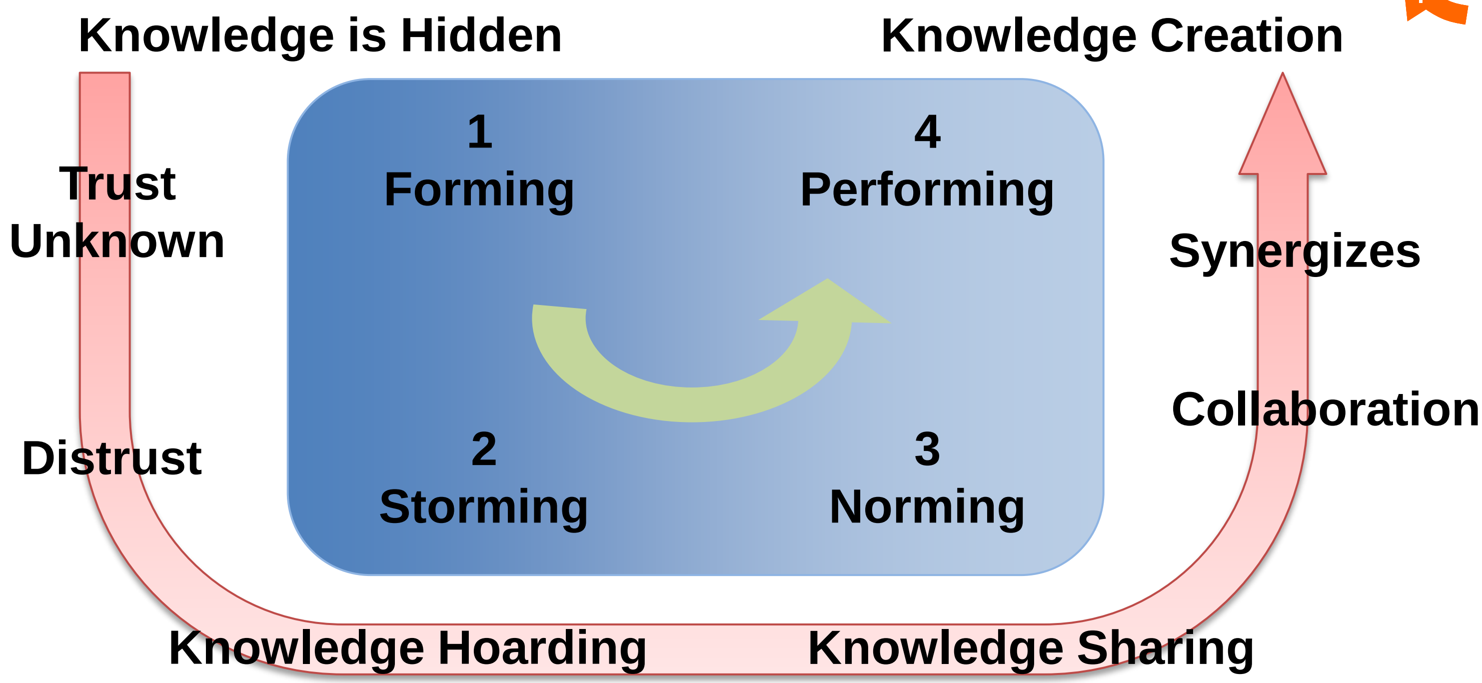
This tool can be used to evaluate your choices against your customer's requirements or project criteria. Each criteria is given a weight and each solution is given a score. The total score is used to compare solutions. Question how all the solutions could be improved to better meet your criteria.

Use for more complex decisions where the team needs a more objective method for selecting a direction.

See Toolkit Here

		Ferrari		Honda		Mazda	
Criteria	Weight (1-3-9)	Score (1-10)	Wt x Score =Total	Score (1-10)	Wt x Score =Total	Score (1-10)	Wt x Score =Total
Gas Mileage	9	2	18	8	72	5	45
Color	3 x	5 =	15	5	15	2	6
Seats 4	1	1	1	8	8	5	5
Airbags	3	6	18	8	24	5	15
Safety Rating	1	5	5	9	9	2	2
Overall Score			**57**		**128**		**73**

Team Management



Team Stages – Knowing Where Your Team Is

Understand that teams undergo stages. First the team is formed, then enters into ‘Storming’. Acknowledge the different stages and use the facilitation tools to keep your team moving forward.

Bruce Tuckman [(1965)](#) “Developmental Sequence in Small Groups”

Project and Team Management

Lean Six Sigma

GRPI Checklist

Rate Your Team's Effectiveness: Ask your team to do a self assessment in an effort to discuss key areas needing improvement in order to be an effective team. Use of the tool can be the springboard toward uncovering issues and improving communications. Follow up with brainstorming solutions and prioritizing.

	Low				High
GOALS - How clear and in agreement are we on the mission and goals of our team/projects?	**1**	**2**	**3**	**4**	**5**
ROLES - How well do we understand, agree on, and fulfill the roles and responsibilities for our team?	**1**	**2**	**3**	**4**	**5**
PROCESSES - To what degree do we understand and agree on the way in which we'll approach our project AND our team? (Procedures and approaches for getting our project work done? For running our team? Making decisions and resolving conflict?)	**1**	**2**	**3**	**4**	**5**
INTERPERSONAL - Are the relationships on our team working well so far? How is our level of openness, trust and acceptance?	**1**	**2**	**3**	**4**	**5**

Next Steps to be a White Belt:

- Complete the Module 4 Quiz.
- Right away, select three tools and incorporate them in a meeting you lead, facilitate or can influence.
- For additional tools and reference, see our 'Maximizing Meetings' Toolkit. Link HERE.
- Have your supervisor sign the certificate:
  - Acknowledging you have completed a Waste Walk
  - Acknowledging you have completed the A3
  - Acknowledging your new skill set.

  Click here to print your White Belt Certificate

For Yellow Belt certification: Select and document three tools to be included in your certification worksheet. Discuss with your leader the tools used, your completion of the White Belt level and interest to pursue Yellow Belt certification.

Certification Worksheet Link HERE