Group Facilitation Processes for Quality Improvement Projects

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Today’s session

• Facilitation
• QI + facilitation
• Session design
Objectives for today’s session

1. Identify effective group facilitation methods to support a team at different stages of a QI project

2. Develop a facilitation plan for an upcoming session

3. Demonstrate facilitation of a small group conversation on a given improvement topic
1. Think about a time when you coached or facilitated a group and made a noticeable difference.

2. Take a minute to jot down a couple of details.

3. Find a partner at your table. Take turns sharing your story.
“Facilitate”

fac·il·i·tate [fuh-sil-i-teyt] – verb (used with object), -tat·ed, -tat·ing: To make easier : help bring about

Merriam Webster’s Collegiate Dictionary, 10th ed., 1994
A facilitator is “One who contributes structure and process to interactions so groups are able to function effectively and make high quality decisions. A helper and enabler whose goal is to support others as they pursue their objectives.”

Facilitator Competencies

A. Create Collaborative Client Relationships
B. Plan Appropriate Group Processes
C. Create and Sustain a Participatory Environment
D. Guide Group to Appropriate and Useful Outcomes
E. Build and Maintain Professional Knowledge
F. Model Positive Professional Attitude

International Association of Facilitators, 2015
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“A continuous series of actions and events set up to accomplish something with a group. Processes are dynamic: they have their own unique origins, lengths, developmental cycles and conclusions. A process may be a single workshop that happens over a few hours or a longer initiative that includes a series of meetings, consultations and reports that take place over months or longer.”

Strachan and Tomlinson, *Process Design: Making it Work*
Design – Part I

Consider an upcoming group session you have been asked to lead. Write out some important details:

1. What is it about?
2. Who will be there?
3. What’s on the agenda?
**Agenda**
What will be addressed.
The topics to be addressed in the session
The time for each
The objective
The lead

**Design**
How it will be addressed.
The flow
The steps
The processes to be used
The tools to be used
The “Blueprint”
The “Orchestration”
The Power of "3"

- Stories
- Drama
- Painting
- Photography
- Music
- Design
Designing a session

1. Item – What topic will be discussed or addressed?
2. Intended outcome – What is the aim?
3. What level of involvement is needed?
4. Result or product – What does the group need?
5. Implementation – How will the results or product be used by the group?
6. Process – What steps will help the group to reach the decision and create the product?
7. Time
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Participation

Create the conditions:

• Recognize the potential blocks
• Understand the group’s context
• Choose an appropriate setting
Participation

1. Full responsibility
2. Decision making authority
3. Implementation responsibility
4. Input toward decisions
5. Input toward implementation
6. Education
7. Persuasion
8. Information

From: Ladder of Involvement in Decision-making
(The Canadian Institute of Cultural Affairs, 2012)
Design – Part II

Consider the group session you thought about earlier.

Map out the session using the blueprint and categories provided. Add in more details about QI and group process tools you will use to address the topics.
“Every story is the beginning of a conversation, with ourselves and others.”

Wendy Leebov, Ed.D
Partner and Founder, Language of Caring
Stories

• Relevant, brief, relatable

• Standard storyline:
  • Protagonist has a problem
  • Protagonist struggles with the problem
  • Lessons learned influence future action

• Your story, their stories, others
"A conversation with one person can solve a problem, or help heal a wound. A conversation with several people can generate commitment, bond a team, generate new options or build a vision. Conversations can shift working patterns, build friendships, create focus and energy, cement resolve."

R. Brian Stansfield, in *The Art of Focused Conversation*, p.6
Types of Conversations

- Information sharing
- Problem solving
- Planning
- Relationship building
Principles for formal conversations

“We acknowledge each other as equals.
We try to stay curious about each other.
We recognize that we need each other’s help to become better listeners.
We slow down so we have time to think and reflect
We remember that conversation is the natural way humans think together.
We expect it to be messy at times.”

From Margaret J. Wheatley, Turning to One Another, p. 29
Conversation Frameworks

Your session will typically occur in parts, each of which may involve a conversation. Each conversation may also be broken into parts, and the flow can be structured in advance.

• **What? So What? Now What?**
  – Enabling action – Strachan, *Making Questions Work*

• **Focused Conversation - ORID**
  – Opening, middle, close – Stansfield, *The Art of Focused Conversation*
Objective

• Facts, data, reality
• Ensures everyone is dealing with the same thing(s)
Reflective

• “Internal relationship to the data”
• Reveals the group’s initial responses, their gut reaction
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Interpretive

• The meaning in the topic being discussed

• This draws out the significance and meaning for the group
Decisional

• Resolutions, implications and new directions
• This stage allows the group to get relevance from the previous stages
Do you recognize these?

What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in an improvement?

Design – Part III

What questions can you use to guide the conversations you will have with your group?
“Facilitation is leadership by consent.”

(Bens, 2005)

• Be in charge, not in control.
• Facilitators manage process, and can negotiate the authority to do so.
Some “best things a facilitator can do”

1. Help people understand why they’re there
2. Make participants the center of attention
3. Display energy and appropriate levels of assertiveness
4. Be flexible and allow changes in direction of conversations
5. Ask questions to guide
6. Ensure participants take ownership for the achievements in a session
7. End sessions with a positive note

Adapted from Ingrid Bens, 
*Facilitation at a Glance, 3rd ed., 2012*
Reflection on a session

- What did we do?
- What worked well?
- What can I improve for next time?
Self Reflection (Competency F1.)

- Why do you want to facilitate?
- What do you bring to the people you facilitate?
- What’s unique about what you bring to facilitation?
- What actions or activities will I always leave out of my facilitation?
- What elements will always be in my work?

(Thank you to Ingrid Bens for these self-reflective questions. Adapted from Advanced Facilitation Strategies.)
Humility.
Authenticity.
Wonder.
Thank you.

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References and Selected Resources