

Integrated Care Teams: The Front Office

Train the Facilitator Guide

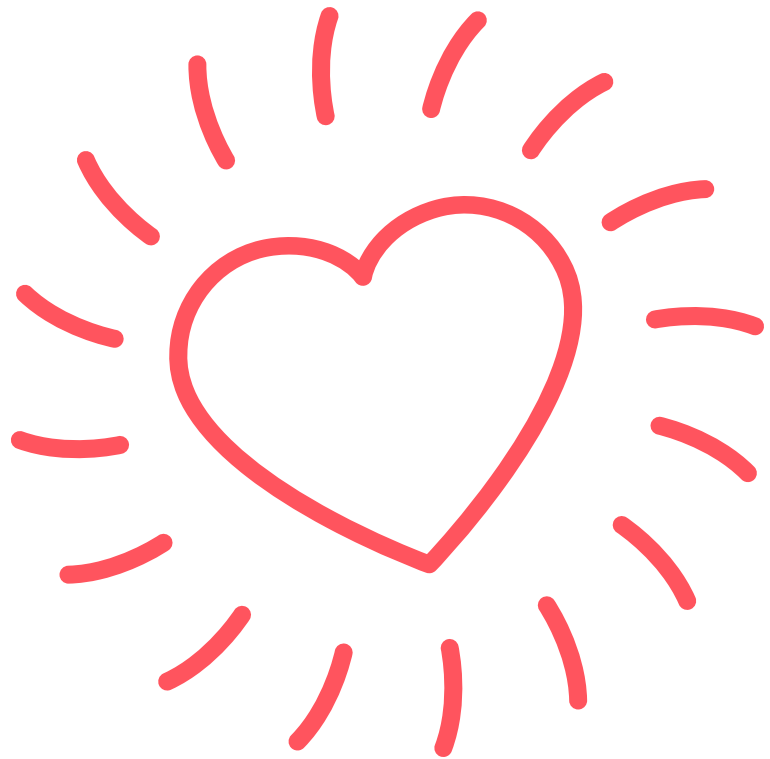


ACKNOWLEDGEMENTS

This guide was created for the Montana Primary Care Association's Course: Integrated Care Teams: The Front Office.

NOTICE

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FACILITATOR PRACTICE



Empathy is the only human superpower
- it can shrink distance, cut through social
and power hierarchies, transcend differences,
and provoke political and social change.

- Elizabeth Thomas

PRACTICING WORKSHOP FACILITATION

For the practice as an facilitator, you will be in your small groups. Each person will choose a small section of one of the workshops to present, for 5 Minutes. Then the person practicing will get feedback from the rest of their group.

FAQ: Is 5 minutes facilitating really enough for someone to give me feedback? Some of you may be surprised that even in presenting for this short of time offers your colleagues substantial material to consider in giving you feedback. Typically, our colleagues can see our strengths as well as areas of growth within just a few minutes. This practice also increases our comfort in getting and giving feedback, in a structured setting. We will present for longer periods of time in other sessions too.

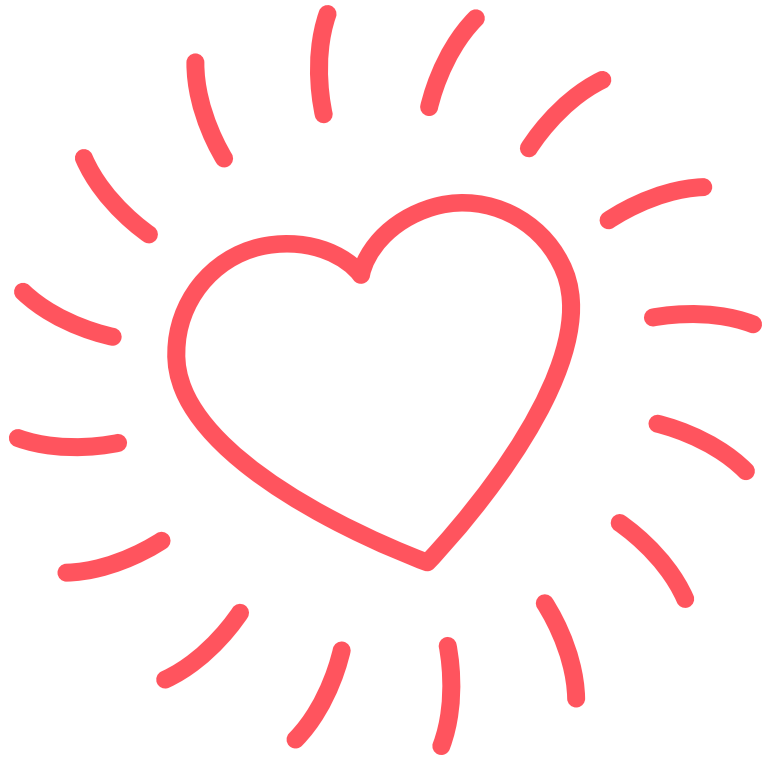
FAQ: How do I choose a section? You can pick any section of the workshop to present; it doesn't have to be a whole section (for example, it doesn't have to be the whole open ended question section, it can be just the first slide of open-ended questions, to frame up to the participants how important they are in empathic communication). The content you pick is secondary, it is just to give you material to work with in practicing (although some might consider picking a piece of content they don't feel as knowledgeable about, in order to increase confidence in that section). Later in the course, you can also choose to practice fielding questions or facilitating a discussion.

FAQ: How much should I practice? For those of you that do better preparing just a few days or a few hours before presentations, or maybe not at all, don't take this as a hint you need to prepare more! As we talked about in the initial workshop, we are all different in terms of how we manage nervousness, and how we best prepare to perform in anyway, so we encourage you to do what you know works best for you.

FAQ: Do I have to use these slides? Yes. The slides have been sent to all of you. They are also on the 'facilitator' tab on www.emorrisonconsulting.com There are presenter's notes in almost every slide, which may be helpful to some of you.



FAQ: Will I have the slides up when I present? When you are practicing facilitation for those 5 minutes with your small group, it is ideal to look at the slides that correspond to the part you've chosen (if it is a content part- if you are practicing responding to questions or facilitating discussion, no need for slides). If you want to share your screen during the break out to have slides, you can do this. When we are in person, we can show the slides you want to practice with, or you can bring your laptop to use in your small group.



NUTS AND BOLTS OF CONDUCTING WORKSHOPS



“When someone really hears you
without passing judgment on you,
without trying to take responsibility for you,
without trying to mold you,
it feels damn good!”

- Carl Rogers

COMPONENTS OF EFFECTIVE WORKSHOPS



Connection with participants



Respect for participants



Mastery of the subject



Fascination and energy for the subject



 Setting

 Timing

 Voice/body

 Effective practice

CONDUCTING WORKSHOPS SOLO VS. IN PAIRS OR THREES: CONSIDERATIONS

PROS: SOLO	PROS: PAIRED
No need to practice or coordinate with a partner	Able to regularly get and give feedback to each other, facilitating improvement
Often easier to schedule workshops	Ability to share facilitation, allowing breaks from presenting
More cost effective for an organization	Allows one facilitator to manage break out groups, the chat box, and other tech tasks when virtual
Able to train more people with facilitators working solo	Allows for participants to experience two different facilitation styles, hear things 2 different ways
Often easier to manage time (starting and ending on time, breaks, etc)	Allows the sharing of nervousness, excitement, successes, and mistakes with each other
Your thoughts:	Your thoughts:



EMPATHIC WORKSHOP FACILITATION SKILLS



An exchange of empathy
provides an entry point for people
to see what healing feels like.

- Tara Burke

CREATING AN EMPATHIC WORKSHOP ENVIRONMENT

In-person Workshops & Virtual Workshops



Ensure workshop invites, flyers, reminder emails and other pre-workshop communication is empathic, supportive and reinforces self-care. For example, avoiding the term 'mandatory', avoiding the term 'training' when possible (alternatives for the noun: workshop; alternatives for the verb: resourcing, learning); conveying a sense of warmth in communications, consistent with the content in the workshop.



Arrive early or be on the video platform early in order to be available to connect with participants as they begin to come in. Attempt to connect with each participant as they arrive to welcome them, modeling smiling, eye contact and connecting statements. This creates a friendly environment that is essential to successful workshops. It allows a 'warm start' to the workshop. This also means arriving extra early to set up visual/audio/tech equipment, so you are free to connect when participants begin arriving.



Let participants know at the beginning of the workshop **when breaks will be** and stick as closely as possible to this. This models care and attentiveness to the needs of the participants. Assure participants that they are free to take breaks when they need to and (when on video) can turn off their video if they prefer.



Dedicate a generous amount of time (at least 1 minute per person) to introductions. Even if all participants will know each other, asking a low-risk question for them to answer during introductions sets a tone of comradery. For example, asking what made them come to the workshop (make being 'made' to come okay for people to share on this one!), what they have heard about or what they hope to get from the workshop. If on video, Turn off 'screen share' during this part, so everyone can see each other.



Use **participants' names** whenever possible. If you won't know everyone, name plates are very helpful unless your memory is very good. On video platforms, names typically appear automatically.



Since the foundation of is connecting with others, dedicate some time (2-3 minutes for a short 1-2 hour workshop, or 5-7 minutes for a 3 hour or longer workshop) to sharing what your personal connection to these workshops is. This is where telling a story about yourself can be particularly effective. This is ideally connected to a picture you've included in the slide deck.



Remember that the goal is for participants to have an **experience** of using the skills in the workshop, as well as **being the recipient** of empathic listening. In this way, participants have an experience of feeling connected to another, listening deeply to them. For virtual workshops, if you have the ability to use break out groups, shoot for the same percentage, about 30% of the workshop. If for any reason this isn't possible virtually (if everyone does not have their own screen for break outs, for example), stop screen sharing periodically so everyone can see each other as a group to share and discuss.



Model **'rolling with resistance'** by avoiding contradicting, arguing, or criticizing any participant's comments, even in the most subtle ways. Avoid using the word 'but' after a participant shares (as in 'yes, but we also need to...')



Model the intervention of autonomy by avoiding verbal or written 'command' rules at workshops (for example, 'no cell phones' or 'no late entry'). If limits are necessary, state the action you will take, not what others 'must' do, for example 'Unfortunately if a participant is more than 15 minutes late, the workshop won't be very useful to them, so we will reschedule for the participant to come to another workshop.'



Use the empathic communication strategies as a facilitator when possible, such as **normalizing, affirming, acknowledging, as well reflective listening and open ended questions.**



Avoid calling on people to share. This is anxiety producing for many people; even if the person you called on is not anxious, those that are in the group will find it difficult to relax knowing they could be called on.



Avoid evaluating questions or comments from participants with 'great question' or 'excellent point'. Other participants who were not the recipient of these comments may feel less-than; it also place the facilitator in an 'evaluator' position, which is a power differential not conducive to learning.



If you catch yourself giving advice, asking closed questions or other less skillful means, **engaging in transparent, narrated self-correction** demonstrates humility as well as a growth mindset for the participants.

Specific considerations depending on the method of delivering the workshop:



The 'U' shaped format is one of the best workshop set-ups, as it allows everyone to see one another, which is essential to creating a shared experience in the workshop. It also allows you, as the presenter, to walk closer to those who are talking. If the 'U' isn't possible, small groups at round tables is second-best. Classroom set ups, with rows of tables and chairs is the least effective.



Having refreshments is best. Offering food and drinks is one way of demonstrating empathy, concern for participants' comfort, and an appreciation of their time (if the workshop is in person).



Make sure a welcoming slide is up, your camera is on, and you've chatted a 'hello' to all message in the chat box, before anyone arrives. Greet everyone as they come on.

FACILITATING TRAUMA INFORMED PARTICIPANT PRACTICE DURING WORKSHOPS

In-person Workshops & Virtual Workshops



Keep groups the same for every practice episode. People tend to feel safer knowing their groups won't change; additionally, it is more chaotic to try and change groups for each practice episode.



Ensure participants do not “role play”. This might be the most important guidance for successful practice episodes. Most people have been in trainings where they have role played and often automatically assume this is how they will practice these skills - on a partner who is “pretending” to be a patient. Because role playing is not real, this type of practice is not helpful and rarely results in behavior change for the participants. More importantly, there isn't a real connection between participants unless we are talking as our 'real' selves. It is important to encourage participants to pick something that they feel very comfortable talking about and give some examples, such as sleep, diet, and exercise, which tend to be fairly low risk.



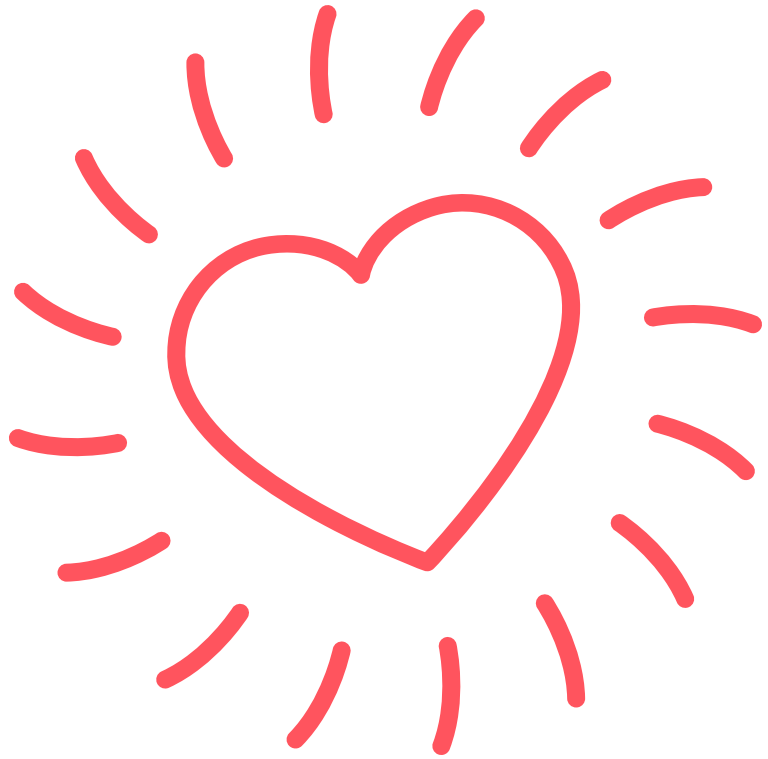
Time the practice. Timing is important as it helps people feel safer about something they are likely nervous about. It is reassuring to know that it is just a short period of time, and that the facilitator is containing/ managing this. 2 minutes per person is a good range for practicing single skills (6-8 minutes per practice episode), later in the workshop when practicing multiple skills, 5 minutes per person (15 minutes per practice episode) is a good range of time. To signal transitions in person, call out for people to switch roles. In virtual sessions, you can send a message to the breakout groups at the correct minute mark.



Ask for people to share out when practice episodes end and triads come back to the larger group. Asking something like “what were people's experiences as practitioners?” and “how was it to be on the receiving end of these skills?” or “what did people notice?” Having 2-3 people share their experiences with the big group after coming back from practice episodes helps the larger group benefit from others' experiences and is a useful transition for people to get settled back into the larger conversation. Avoid calling on people (more on this in the workshop facilitation document).



Caution everyone explicitly to avoid giving advice. The single most common thing participants do, which renders practice ineffective, is giving advice instead of practicing skills. We are all incredibly conditioned to give advice. The tendency is so strong, people tend to engage in it without even knowing they are doing it. Before every practice episode, it is important to remind people not to give any advice, not even a smidgen! This includes “have you ever thought of...” and “do you think X might help...”



EMPATHIC FACILITATION QUESTIONS

1. What are some of the differences in facilitator skills and strategies, between virtual facilitation and in-person facilitation?

2. What are some strategies for modeling the communication skills from this workshop with participants before, during and after the workshop?

3. What are some specific trauma informed consideration in workshop facilitation?

4. What are some trauma informed techniques to invite participants to participate (virtual and in-person)?

5. What are some trauma informed techniques for answering questions posed to you?

6. What are some trauma informed techniques to manage participants who are very talkative and participatory during the workshop?

7. What can you do if you don't have an answer for a question during the workshop?

8. What are some trauma informed techniques to address multitasking participants who check their phone or email, or virtually, seem like they may have left or are otherwise not engaged?

9. What are some trauma informed techniques to manage participants who openly challenge the material?

10. What are the most important communication skills that a workshop facilitator needs in order to conduct a successful workshop?

GUIDANCE ON SLIDE ALTERATIONS OF EM CONSULTING WORKSHOPS

Slide Deck Alterations				
	Acceptable	Encouraged	Discouraged	Reason for discouragement
Adding your organization's logo to slides	✓	✓		
Adding a slide with your organization's mission, values or strategic plan	✓	✓		
Adding your own photos to match stories, adding photos of your organization or team in strategic places	✓	✓		
Adding a bit more text on some slides, consistent with the presenter's notes	✓			
Changing language to match the language your organization uses ('client' to 'patient' for example)	✓			
Changing templates (with the same slide content)			✗	This template attributes the workshop to EM Consulting
Adding less than 10% new slides (maximum of 5) with no changes to spirit, philosophy or main idea of content	✓			
Adding more than 5 slides to the workshop; adding slides that indicate a different spirit, philosophy or new content; deleting slides			✗	There is a purposeful ratio of images and graphics to text, to enhance different types of engagement



	Acceptable	Encouraged	Discouraged	Reason for discouragement
Adding substantial text to slides (even from presenter's notes)			✘	Heavy text on slides invokes classroom settings; it pulls participants to read the slides instead of engaging in conversational learning
Using this template for other purposes/ other content/other presentations			✘	The templates were created by EM Consulting's graphic designer: using of the templates outside of the purposes for these 2 workshops is similar to using other's art 'without permission'.

Workshop Facilitation Alterations

	Acceptable	Encouraged	Discouraged	Reason for discouragement
Breaking up the workshop into 2, 3 or 4 parts	✔			
Adding more practice time during the workshop	✔			
Spending more time on introductions to enhance group cohesion	✔	✔		

	Acceptable	Encouraged	Discouraged	Reason for discouragement
Delivering the workshop with less than 30% of time dedicated to practice			✘	Driving content-only workshops is discordant with the relational strategies of workshops.
Having participants role play (instead of using themselves)			✘	Role-playing rarely connects people to each other- a primary goal of practice sessions
Diverging from relational workshop facilitation guidelines toward 'classroom training'			✘	The workshop is designed to be relational, empowering and trauma informed.
Other alterations not specified here	Check with EM Consulting elizabeth@emorrisonconsulting.com			




We would love to hear from you!

Please feel free to reach out:



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