

# Quality Improvement Basics: Meeting Facilitation

## Slide 1 Objectives

After completing this module, participants will be able to

- Define the role of meeting facilitator.
- Identify common facilitation challenges and suggested strategies to address them.
- Describe the PEARLS approach to conflict resolution.

## Slide 2 Facilitation and the Role of Facilitator

Facilitation is the process of designing and running a successful meeting.

To accomplish the aim of facilitation, a facilitator must

- Set the tone for the meeting,
- Moderate conversation, creating an inclusive environment to ensure everyone has a chance to participate, and
- Keep the agenda on track.

In this module, we'll explore how a facilitator can accomplish these key components to successful facilitation.

## Slide 3 Setting the Tone

The meeting facilitator helps to set the tone for the meeting by working with the project leader to develop an agenda that sets the group up to accomplish the goals for the meeting and keeps the team working towards the project goals. The facilitator then sends the agenda beforehand, so people have time to prepare. The agenda will clearly state the purpose, priorities, and time limits to make the meeting productive. A clear agenda helps to create a level of professionalism and importance in the meeting.

## Slide 4 Moderating Conversation

During the meeting, the facilitator is responsible for moderating inclusive conversation and ensuring the group stays on track with the agenda. Some ways to do this are

- Creating an inclusive environment
- Include some introductory questions to let everyone get their voice in the room early in the meeting.
- If the group is large, build in small group discussion time.
- The facilitator keeps the agenda topics and discussion moving forward, clarifying, synthesizing, and summarizing discussions.
- The facilitator also reviews key decisions, agreed-upon action items, and next steps at the end of the meeting.

## Slide 5 Communication Challenges

Inevitably, your team will experience some challenges in communication during meetings. Some common challenges to anticipate and prepare for include:

- Distractions that can cause the team to veer from the agenda; if this is a regular occurrence, the team leader and facilitator need to determine when and how to address items that come up; for

example, having a parking lot section of the notes to capture ideas or topics for future discussion and then making sure to build time for those discussions into future meeting agendas.

- Physical proximity can be a factor in communication. Are you meeting in person, virtually, or a hybrid mix with some team members in person and others joining virtually? Non-verbal cues can be important for team communication. If you are meeting virtually, is there an expectation that team members have their cameras on? If you are conducting a hybrid meeting, ensure all team members can fully participate.
- By their nature, people have personalities. Facilitators working with the same team over time benefit from getting to know the personalities in the room and can leverage that knowledge to prepare accordingly. Setting some ground rules up front can be a helpful way to avoid any issues that might arise, such as some individuals taking up too much airtime and others not speaking up at all.
- People also have varying communication styles. Some folks might be direct, while others communicate best through stories. We may be hearing the same message but translating through our lenses a bit differently. It is the facilitator's job to clarify, synthesize, and summarize discussions to ensure the team is on the same page about any decisions that have been made.
- Language barriers can arise – for example, team members may not share the same first language, or there might be participants who don't speak the same language as most of the group. In these cases, translation services may be appropriate. Other language barriers can arise when team members represent different areas of deep subject matter expertise. Does the information technology specialist understand the clinical discussions brought forth by nursing staff and vice versa? Again, part of the facilitator's role is clarifying, synthesizing, and summarizing discussions to ensure the team has a shared understanding of what is being discussed.
- Conflict and disagreement among team members is not bad. It is how we learn from each other and broaden our perspectives. However, conflict can deteriorate relationships and teamwork if not resolved quickly and respectfully. Using conflict resolution techniques improves the experience of interpersonal communication and relationships. Let's consider ways to understand and resolve conflict in detail.

## Slide 6 Understanding Conflict

It is helpful to understand the causes of conflict in order to develop a collaborative resolution strategy. Mediation expert Christopher Moore identified five sources of conflict:

- Data conflicts center around lack of information, misinformation, differing views on the relevance of data or different interpretations of data
- Interest conflicts are perceived or actual conflicts of interest, procedural interests, or psychological interests
- Values conflicts could be due to different ways of life, ideology, or world view or different criteria for evaluating things
- Structural conflicts arise from unequal authority, unequal control of resources, or time constraints; and
- Relationship conflicts stems from miscommunication, strong emotions, stereotyping, or repetitive negative behavior

A skilled facilitator can make observations about what people are saying and doing in a meeting and may be able to help with identifying conflict and the potential source, as well as strategies to overcome it.

### **Slide 7 Common Approaches Conflict Resolution**

Conflict resolution at work and on teams is an area that requires a deep set of skills. When handled well, conflict can drive innovation and team cohesion. However, when mismanaged, conflict can be extremely disruptive.

Here are four common responses to conflict and potential outcomes.

- In a compromise, both parties settle for less
- Avoidance is when issues are ignored or side-stepped
- Accommodation focuses on preserving relationships
- A dominance-centered approach manages conflict through directives or ultimatums for change

We will now look at a method to help resolve conflicts. The team leader or facilitator can help team members address conflict using this method.

### **Slide 8 PEARLS Model**

The PEARLS model is a communication tool to help diffuse difficult situations. It stands for

- Partnership – Emphasize that you are working together to solve the issue(s) and you value the other person's input.
- Empathy – Work to understand the other person and reassure them that you recognize their concerns.
- Appreciation/Apology – Let the other person know that you are sorry they are frustrated or upset.
- Respect – Show respect for their concerns or fears by listening to fully understand their point of view.
- Legitimization – Legitimize their concerns and feelings by summarizing what they shared to demonstrate that you understand.
- Support – Let them know that you appreciate their courage and candor and that you will support each other to come to an agreed-upon solution.

### **Slide 9 PEARLS Scripting Example**

Here is one example of how pearls scripting might work

- Partnership – I know we can figure this out together.
- Empathy – I can clearly hear you are concerned about this.
- Appreciation/Apology – Your effort really shows here and I'm sorry this is frustrating.
- Respect – Your expertise is always important to our work.
- Legitimization – Who wouldn't be concerned about this?
- Support – I'd like to help with this.

## Slide 10 In Summary

- Facilitators are responsible for setting the tone for meetings, moderating conversation, creating an inclusive environment, keeping the agenda on track, and documenting next steps.
- All teams experience communication challenges, including those that stem from distractions, physical proximity, personalities, varying communication styles, language barriers, and conflict.
- PEARLS is a communication tool that helps resolve conflict by letting someone know you are their partner, showing empathy, appreciation, and respect, legitimizing their perspective, and supporting them in finding a resolution.