Facilitating the National Public Health Performance Standards State Assessment Process Facilitator and Note-Taker Training

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Training will Cover...

- Brief Background
  - Purpose, roles and agenda

- Guidance for facilitators and note-takers
  - Setting you up for success

- Meeting logistics
  - Tips and lessons learned

- Questions or anticipated concerns
  - Scenarios
The assessment
- What is the purpose?
- Why conduct the assessment now?
- What is the role of the State Public Health Agency?
- How are the days organized?
- What do we plan to do with the findings?
Tips for Preparing

- Understand previous assessment (if applicable)
  - What was the process and who participated?
  - What were the overall results?

- Have confidence in the process
  - Tool is validated
  - Several types of meetings work
    - Retreat styles have proven effective
  - Discussion is important
  - Results will guide action
Setting You Up for Success

- Let’s discuss...
  - Expectations
  - Ground rules
  - Facilitation basics and tips
  - Documents needed
  - Getting started
  - Voting process
  - Capturing scores and comments
  - What if...?
Expectations

- **Facilitators**
  - Come prepared
  - Guide discussion
  - Provide recaps
  - Work seamlessly with note-takers

- **Note-takers**
  - Record all votes on paper copy of instrument
  - Record comments on laptop
  - Provide definitions
Ground Rules

- Have common set across all breakouts

- Examples:
  - Everyone invited because he/she has something to contribute
  - Agree to work with imperfect process
  - Okay to respectfully disagree (tell us why)
  - Work through questions without getting bogged down on process
  - Others?
The Role of a Facilitator

- Keeping the discussion on track and focused
- Allowing varied points of view to be heard
- Assuring that no one dominates the conversation
- Setting expectations and managing the group
- Maintaining flexibility to assure that group needs are met

- Chiming in with personal opinions
- Discouraging different points of view
- Allowing certain individuals to control discussion
- Providing vague or confusing instructions
- Maintaining a rigorous approach regardless of group needs

Appropriate

Not Appropriate
Facilitators should...

- Be prepared
- Know their audience
- Anticipate questions
- Expect pauses
- Understand the process and scoring
- Manage the discussion
- Stay within the designated timeframe
- Have a system for recording information
More Tips

- Facilitators may want to...
  - Provide incentives
  - Recognize progress
  - Periodically review findings
  - Refer to ground rules
  - Other ideas?
Facilitators
- Facilitator’s Guide (includes instrument)
- Agenda
- Other (seating plan?)

Note-takers
- Instrument for recording scores
- Notes template (optional)
- Glossary
Introductory comments
- Welcome group
- Introduce self and note-takers
- Conduct brief introduction (with ice breaker)
- Reiterate key points from general discussions
- Articulate roles and expectations
- Review response options and voting process
- Discuss ground rules
- Jump in....
What should you do?

- Read the EPHS and the questions it addresses
- Briefly summarize what the EPHS includes
- Highlight the major players
- Transition to general discussion
  - Discuss what and how we are doing
  - Focus on the system
  - Summarize key points
  - Move to questions
Voting

- Decide when group is ready to vote
  - No new comments
  - Significant agreement
  - Running out of time
  - Ask group

- Instruct participants
  - Hold up voting card
  - Count and record votes
  - Move on...
Capturing Score & Comments

- Use instrument to record data
  - Can get group to help confirm numbers if meaningful to capture
  - Otherwise, record one “final” response

- Comments
  - Model standard #
  - Strengths, weaknesses, immediate improvements
  - Priorities
  - Other comments
Meeting Logistics

- Tips
- Room assignments
- Name tags
- Seating layout
- Packets
- Flip charts
- Best place for facilitator and note-taker
- Other?
Facilitation techniques and strategies for dealing with...

- The “dominators”
- The “silent” type
- The “debaters”
- The “inquisitive”
- The “critical thinkers”
- The “distractors”
- The “know-it-alls”
In Summary

- Do your homework
- Be confident
- Share your enthusiasm
- Have fun with the process!
For further information on the National Public Health Performance Standards please contact...

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