

## **Session #2: Facilitating Meetings**

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Presentation will begin at 12:00 PM (PT)



**ITHS**

Institute of **Translational** Health Sciences  
ACCELERATING RESEARCH. IMPROVING HEALTH.

## What We Offer:

### 1. Research Support Services

Members gain access to the different research services, resources, and tools offered by ITHS, including the ITHS Research Navigator.

### 2. Community Engagement

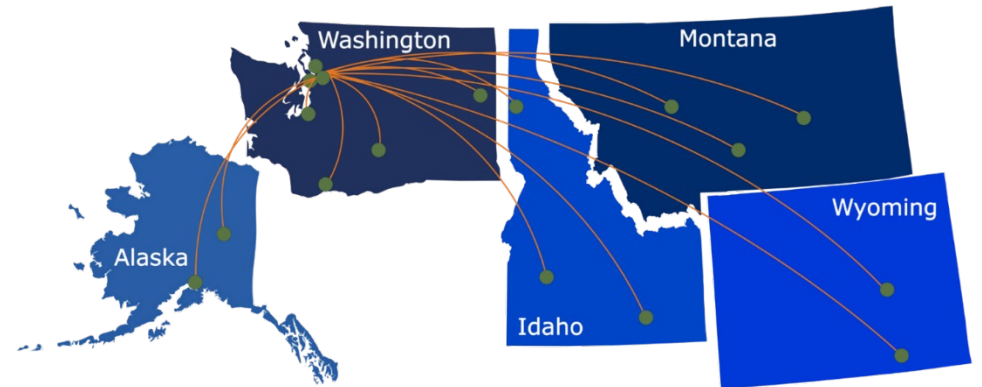
Members can connect with regional and community based practice networks

### 3. Education & Training

Members can access a variety of workforce development and mentoring programs and apply for formal training programs.

### 4. Funding

Members can apply for local and national pilot grants and other funding opportunities. ITHS also offers letters of support for grant submissions.



# Upcoming Events ITHS Education Events

In addition to the monthly Team Science Seminar Series, ITHS offers other Career Development Opportunities.

| Date                       | Title  |
|----------------------------|--|
| Nov. 19, 2024 at 12pm (PT) | Career Development Series <a href="#">Measurement Development and Evaluation</a> |

More details and event registration via the ITHS events calendar at: <https://www.iths.org/news-events/calendar/> or contact [ithsedu@uw.edu](mailto:ithsedu@uw.edu)

# What is the Team Science Seminar Series?

**Overall Goal:** Annual series launched in 2022 to assist researchers to address challenges to collaboration & collective team functioning, improve their ability to lead interdisciplinary teams, communicate & build trust with their collaborators, & identify the best ways to solve problems collaboratively.

**Target Audience:** Early career faculty, pre- and post-docs, and professional research staff

## **Design Principles (informed by adult learning theory):**

- Goal oriented content (tied to Team Science Competencies & best practices from literature)
- Balance of didactic & interactive content to facilitate immediate application
- Provide additional resources for self-directed learning



# Focus for 2024-2025: Developing Your Collaborative Leadership Potential

- What do we mean by collaborative leadership potential?
  - Understanding, improving, and owning your contribution to team effectiveness
  - Developing skills to communicate & build trust with your collaborators
  - Identify ways to collaboratively achieve goals and solve problems





## 2024-2025 TEAM SCIENCE SEMINAR SERIES SCHEDULE

**Logistics:** 8 one-hour sessions occurring Oct 2024-May 2025 from 12pm-1pm on the 1<sup>st</sup> Thurs of each month; certificate offered through ITHS if attend/watch all 8 sessions & complete evaluations.

| Date                                 | Topic  | Date     | Topic   |
|--------------------------------------|--|----------|---|
| 10/3/2024                            | Introduction to Leadership Competencies for Team Science (Erin Blakeney & Brenda Zierler)<br>(Recording available) | 2/6/2025 | Resources to Support Emotional Intelligence and Personal Growth (Brenda Zierler & Jennifer Sprecher)    |
| 11/7/2024                            | Facilitating Team Meetings (Jennifer Sprecher)   | 3/6/2025 | Mentorship and Leadership at Different Career Stages (Brenda Zierler & Jennifer Sprecher)               |
| 12/5/2024                            | Leadership Journey (Peggy Odegard)   | 4/3/2025 | Navigating Interpersonal Conflict: Courage to Listen, Courage to Speak (Sara Kim)                       |
| 1/9/2025*<br>*2 <sup>nd</sup> Thurs! | Developing Your Individual Development Plan for Leadership (John Amory)  | 5/1/2025 | You Don't Always Need to Say "Yes": Aligning Goals to Opportunities (Jennifer Sprecher & Erin Blakeney) |

# Session #2: Facilitating Meetings

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**Jennifer Sprecher**

BS Industrial Engineer

MS Management Science

Six Sigma Lean Black Belt Certification

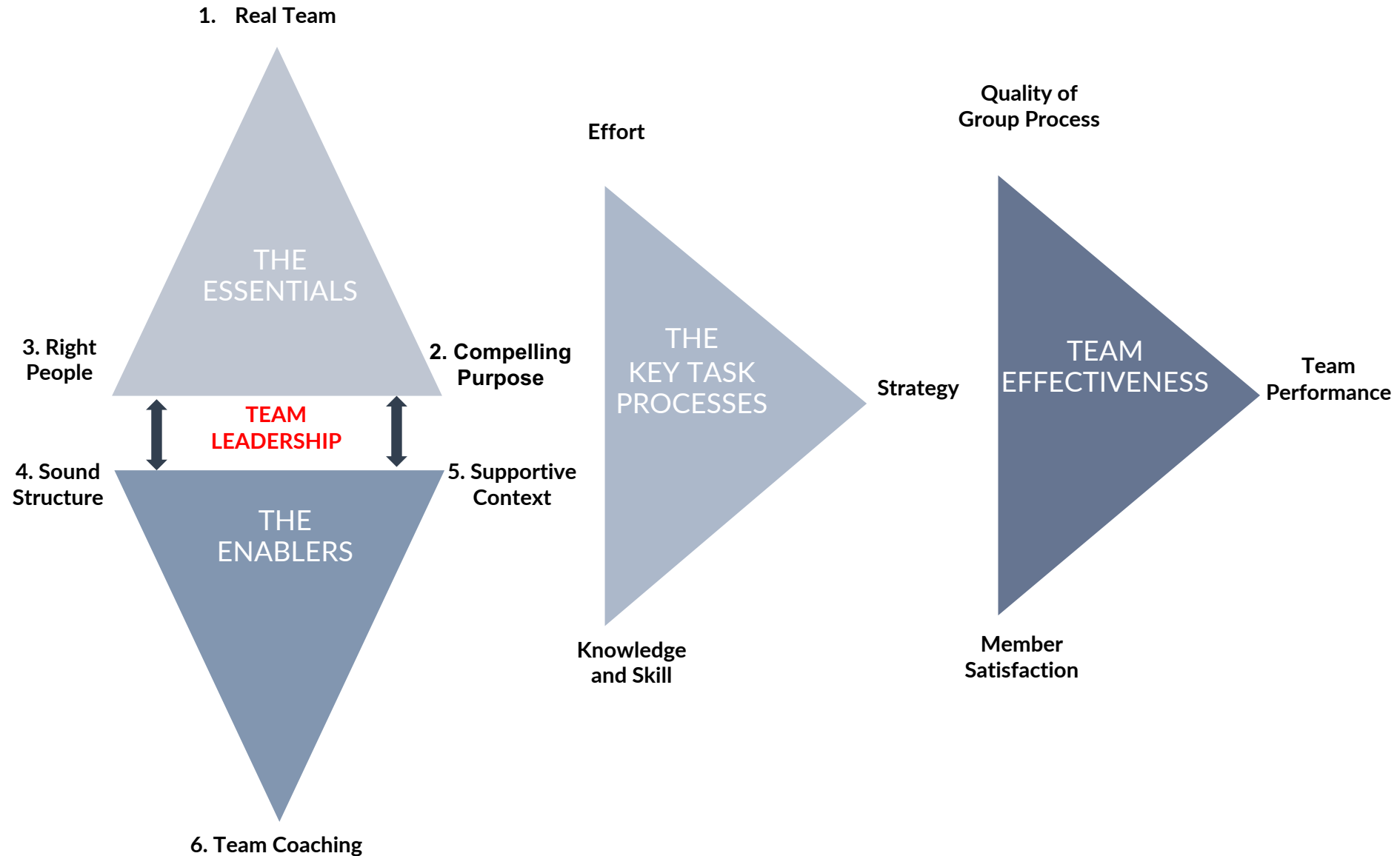
Executive Coaching Certification

Quality Management Certification

Facilitation and Change Management Certification

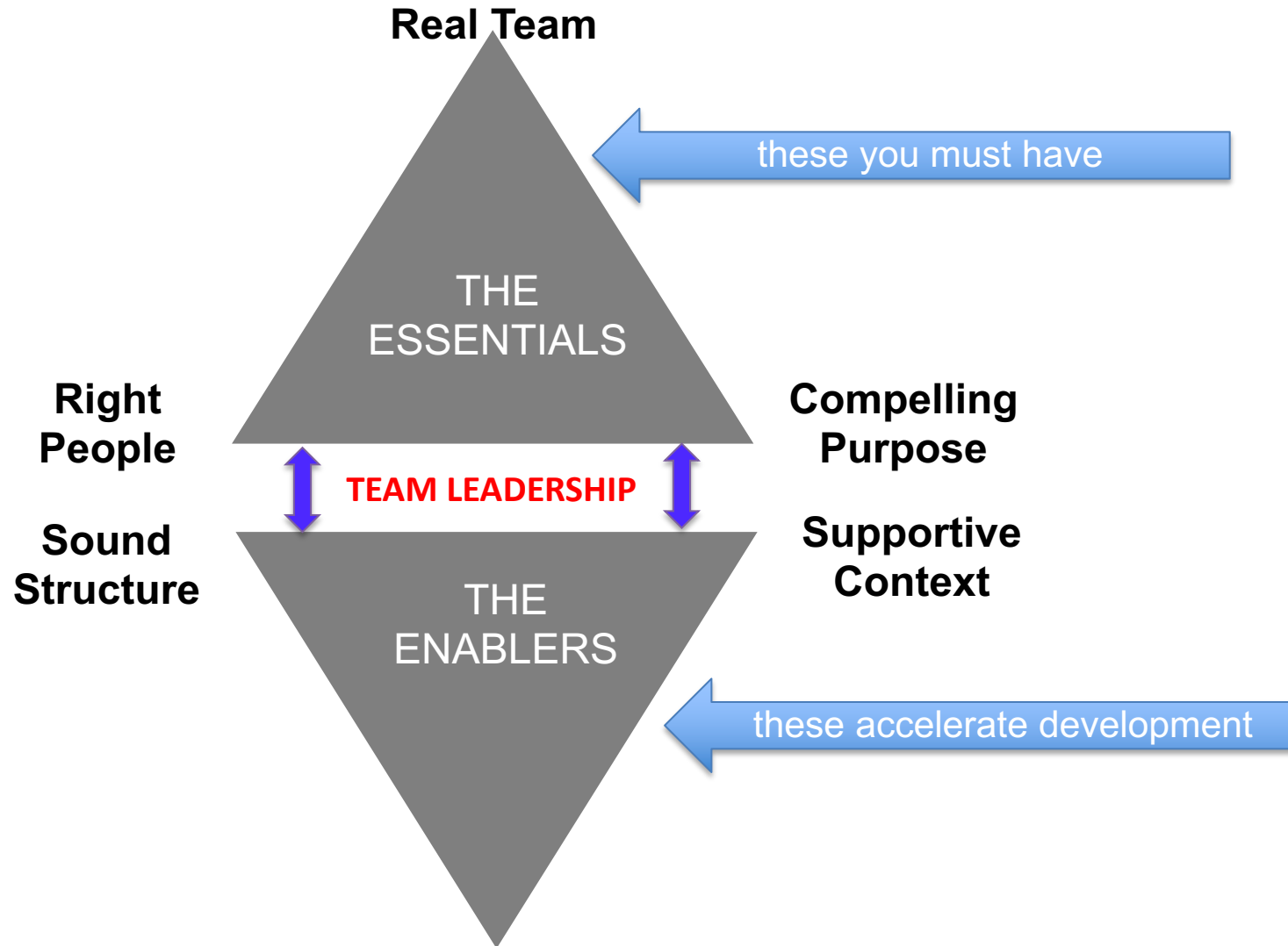
Strategic Planning and Team Startup facilitation

# The 6 Conditions of Team Effectiveness





# The Six Conditions for Team Effectiveness



## Facilitators:

*Help create a Real Team by demonstrating and setting a tone*

*Move the team towards its objectives- helping the team to find success in meeting its purpose.*

*Use structured tools while also using interpersonal skills to recognize and address challenges*

# Leadership Skills

- ❖ Listen\*
- ❖ Create a psychological safe environment\*
- ❖ Constructively engage in conflict\*
- ❖ Provide effective feedback and solicit feedback\*
- ❖ Use a growth mindset\*
- ❖ Lead and manage change\*
- ❖ Use versatility\*

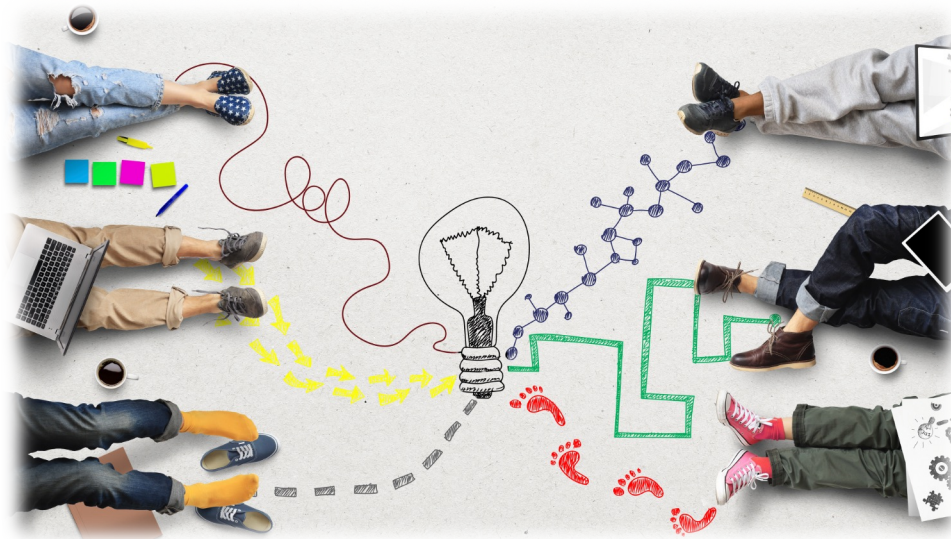
*\*All skills of Facilitators*

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# LEARNING OBJECTIVES

**AT THE END OF THIS SEMINAR, PARTICIPANTS WILL BE ABLE TO:**

- 1) Understand the role of the facilitator
- 2) Apply 2 primary tools to facilitate meetings effectively
- 3) Understand 2 facilitation techniques



# PLAN FOR THE DAY

Facilitator-enabling individuals, teams and organizations to change<sup>1</sup>

Helping groups do better<sup>2</sup>

- Prepare for collaboration
- Set the tone
- Accomplish objectives
- Manage challenges
- End with reflection



# PREPARE FOR COLLABORATION

## Agenda

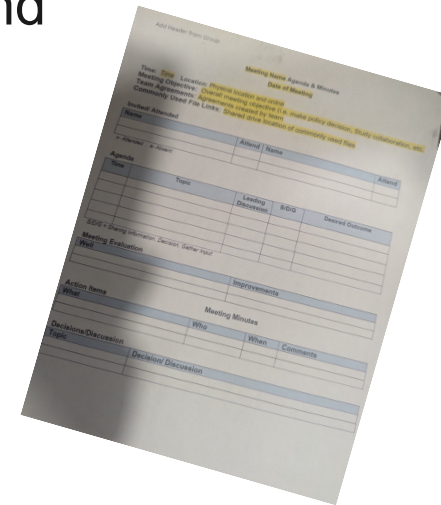
- Capitalize on the shared purpose by having the **team & meeting** objective(s) at the top
- Every agenda item should have a clear purpose and expected outcome
- Capture action items to help people remember their commitments
- Allow time for discussion within the agenda

## Shared drive

- Encourage everyone to share their notes for each agenda item on the shared agenda
- Keep all shared documents on the drive

## Insightful Introductions

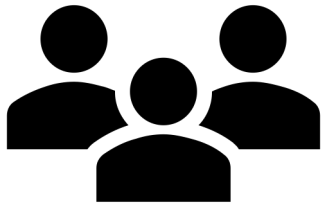
- 2 minutes each
- What about this project serves your passion?
- What are you hoping to contribute?
- Can do virtually
- Continue with 2 mins of personal sharing "did anyone do anything fun/ relaxing/ this weekend"



# SET THE TONE

## Establish ground rules

- Build them together if possible (20 mins)
- Present a set for agreement
  - Share the floor
  - Listen before speaking
  - Open mind
  - Demonstrate respect



## Create a Welcoming Environment

- Circle or table
- Videos on
- Greet people when meeting for first time





# SET THE TONE

## Visual Presence

- Capture thoughts
- Move around the room
- Ground rules on agenda, posted
- Present a set for agreement
- Document key points and decisions



## Encourage participation

- Round robin sharing
- Breakout groups
- Ask open ended questions
- Verify that you have heard correctly



# ACCOMPLISH

- Manage the time
  - If going over- ask the group what they want to change on the agenda
- Minimize sharing for sharing purpose
- Maximize learning, decisions, next steps
- Meet the objectives of the agenda item or have a plan to meet them



# MANAGE CHALLENGES

Enter your ideas in the chat

## General skills

- Listen carefully
- Express empathy and appreciation
- Remain neutral & unbiased
- Facilitate consensus
- Cultural and hierarchical sensitivity



# MANAGE CHALLENGES

Enter your ideas in the chat

## Crickets

- Ensure all ideas are heard
- Don't allow ideas to be immediately cut down
- Ask key questions on the agenda to allow prep time
- Small group discussions



# MANAGE CHALLENGES

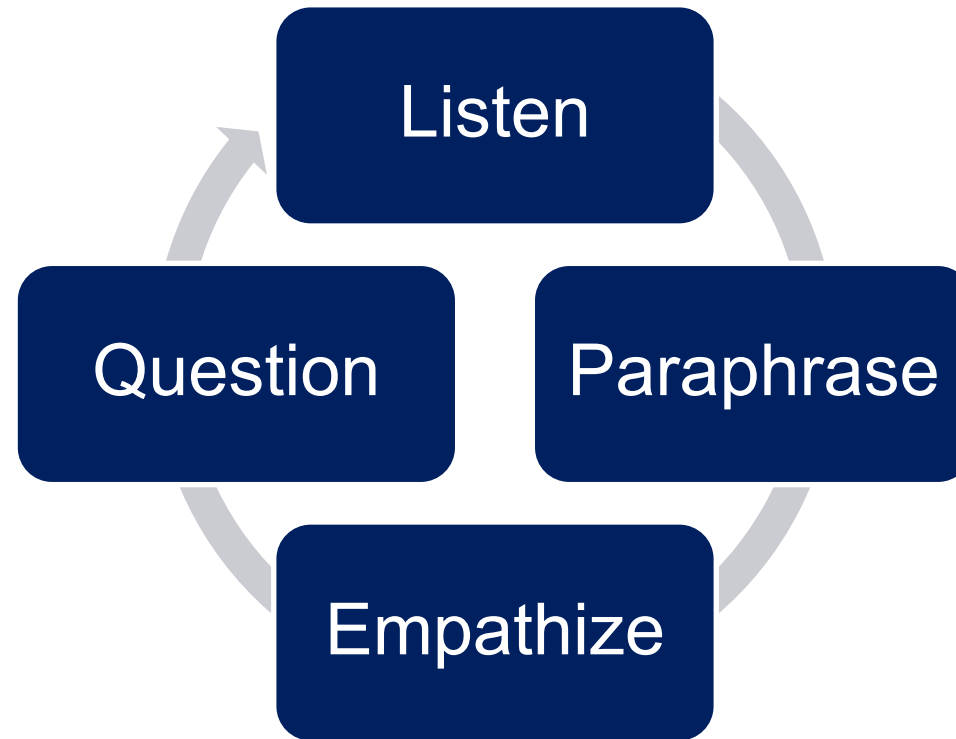
Enter your ideas in the chat

## Disrespect

- Goal is to keep the environment safe
- Do not want to lose either party
- Least invasive to more invasive
  - Gentle reminder of ground rules
- Allow an out- "I know you didn't mean that they aren't busy. We all know that xx is very organized and great at this task, but are there others who may want the task or perhaps we can better share the load"
- "You've made some really great points, but let's hear from xxx on this"



# LISTEN CAREFULLY



**Make it Real  
Not Rote**

Schuman, Sandy. *The IAF Handbook of Group Facilitation*. John Wiley & Sons, 15 June 2012.



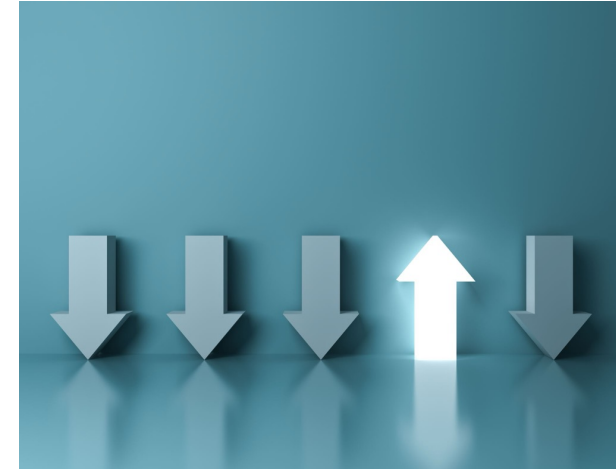
# REFLECTION

Next steps

Next Agenda Items

Plus/ Deltas (preparation, action items, collaboration, sharing, moving forward)

Feedback on meeting frequency & length, objectives, subgroups



# FACILITATING MEETING LEARNINGS

## Tools

- Agenda
- Shared drive
- Insightful introductions
- Ground rules

## Techniques

- Welcoming Environment
- Visual Presence
- Encourage participation
- Managing challenges
- Reflection

Breakout: which tools and techniques will you apply

# DEBRIEF / WRAP-UP

- ▶ Please provide feedback on today's session!
  - ▶ Feedback in chat
  - ▶ Complete Today's Session Evaluation
  
- ▶ Next month's session:
  - ▶ December 5th Leadership Journey by Peggy Odegard 12:00pm-1:00pm
  - ▶ Registration is already live

# REFERENCES and RESOURCES

<sup>1</sup> Dogherty, Elizabeth J., et al. “Facilitation as a Role and Process in Achieving Evidence-Based Practice in Nursing: A Focused Review of Concept and Meaning.” *Worldviews on Evidence-Based Nursing*, vol. 7, no. 2, Feb. 2010, <https://doi.org/10.1111/j.1741-6787.2010.00186.x>.

<sup>2</sup> Schuman, Sandy. *The IAF Handbook of Group Facilitation*. John Wiley & Sons, 15 June 2012.

Christine Frances Hogan. *Practical Facilitation : A Toolkit of Techniques*. London ; Philadelphia, Kogan Page, , Cop, 2003.