



Appendix A

Handouts for Participants

Skills for Successful Collaborations, by Day Piercy

Mindset for Successful Collaborations Workshop

Objectives:

- **To increase awareness about the mindset required to work collaboratively.**
- **To learn techniques to foster a collaborative mindset.**

| | <u>Program</u> | <u>Time</u> |
|---|--|-------------------|
|  | Welcome, introductions, and overview of the workshop | 20 minutes |
|  | Group brainstorm: Characteristics of successful collaborations | 10 minutes |
|  | The mindset for successful collaboration | 30 minutes |
|  | Case study discussion | 30 minutes |
| | <i>Break</i> | <i>10 minutes</i> |
|  | Techniques for maintaining a collaborative mindset | 65 minutes |
|  | Evaluation and closing Final go around – one idea you gained from this workshop and one idea you are going to use right away. | 15 minutes |

Skills for Successful Collaborations, by Day Piercy

Definition of Collaboration

Two or more organizations working together to achieve an agreed upon goal that each cannot achieve separately.

By sharing knowledge, information, resources, power, and decision making, the organizations work together to achieve a significant, positive impact to:

- Meet the needs of battered women and their children.
- Reduce/eliminate domestic violence.

Characteristics of Successful Collaborations

Skills for Successful Collaborations, by Day Piercy

Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.

- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.

- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.

- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.

- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.

- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.

- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.

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Mindset for Collaboration Case Studies

Case Study #1

The law enforcement committee of the local domestic violence coalition is discussing an idea to develop a safety brochure. The local domestic violence program already has a handout that it uses. Mary (the representative from the local domestic violence program) says in an impatient voice, “We already do that. If you want the information, just call us and ask for it.”

*What is Mary thinking/feeling? What will be the outcome of her response?
What response would work better?*

Case Study #2

The local domestic violence program finds out that at the next coalition meeting, Denise, the Victim Witness Coordinator, is going to announce that a law enforcement committee has been created just for law enforcement officials (no representation of the local domestic violence program). Cynthia (local domestic violence program) calls Denise. When Denise answers the phone, Cynthia says, “How can you be so stupid as to think it would be the right thing to do to form the committee without our participation?”

What is Cynthia’s mindset? How could she have handled this situation more effectively?

Case Study #3

The only transitional housing program in the community does not accept children. It frequently has openings due to turnover. The local domestic violence program has met with the executive director of the housing program numerous times to request a change in the policy to open the doors to battered women and their children. The executive director says that she understands the concern but they just aren’t equipped to handle children. In addition, she is very concerned about the potential for violence if a battered woman lived there and her abuser came after her. She really must think about the safety of other residents in the transitional housing program.

You are staff of the local domestic violence program. How would you respond now?

MINDSET WORKSHOP – HANDOUT #1-5

**Rating Exercise
Mindset Characteristics**

Rate Cynthia’s use of collaborative mindset characteristics in the role play with Cynthia and Denise. Use a scale of 0-3 (3 = effective use of this characteristic).

1. **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome. **Rating:** _____
2. **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. **Rating:** _____
3. **Willingness.** Be willing to create a recommendation/agreement/plan of action with the other parties involved. **Rating:** _____
4. **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object. **Rating:** _____
5. **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning. **Rating:** _____
6. **Connections.** Look for connections rather than differences – the “fit” which would meet your needs and others’ needs. **Rating:** _____
7. **Confidence.** See yourself as a significant partner, with confidence in your ability to “hold your own” when situations are confusing and complex.
Rating: _____

Skills for Successful Collaborations, by Day Piercy

How to Maintain a Collaborative Mindset

What are situations that “push your buttons”/make it difficult to maintain a collaborative mindset?

Use the mindset characteristics list to identify situations when it is difficult to maintain this mindset. An example might be: *“When I work with people who don’t understand domestic violence, I feel impatient and frustrated rather than open to possibilities for working together.”*

**How to maintain a collaborative mindset in these situations:
(List at least 3 ideas)**

Evaluation Form
Mindset for Successful Collaborations Workshop

- 1. What was the most useful part of the workshop for your work?**

- 2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)**
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:

- 3. Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)**
Rating: _____
Comments:

- 4. How can the workshop be improved?**

- 5. What is one idea you will begin using immediately?**

- 6. Other comments.** (Please use the other side of the page for additional comments.)

Thanks!

Practice Session on Collaborative Mindset

Objectives:

- To apply collaborative mindset principles to collaboration situations.
- To practice techniques that foster a collaborative mindset.

| | <u>Program</u> | <u>Time</u> |
|---|---|-------------------|
|  | Welcome, introductions, and overview of the workshop | 20 minutes |
|  | Applications of collaborative mindset principles | 25 minutes |
|  | Community coalition case study | 40 minutes |
| | <i>Break</i> | <i>10 minutes</i> |
|  | Continue case study discussion | 40 minutes |
|  | How to maintain a collaborative mindset to break through barriers in collaboration situations | 30 minutes |
|  | Evaluation and closing – one idea you gained from this workshop and one idea you are going to use right away. | 15 minutes |

Skills for Successful Collaborations, by Day Piercy

Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.

- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.

- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.

- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.

- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.

- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.

- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.

Skills for Successful Collaborations, by Day Piercy

Law Enforcement Committee Case Study

The law enforcement committee of the local domestic violence coalition is discussing an idea to develop a safety brochure. The local domestic violence program already has a handout that it uses. Mary (the representative from the local domestic violence program) says in an impatient voice, “We already do that. If you want the information, just call us and ask for it.”

Frank (from the police department) ignores Mary and says, “We just got some funding to produce a brochure – we would really be the best qualified to coordinate this effort.” Mary realizes that she allowed the situation to push her out of a collaborative mindset and now wants to get back on track in a collaborative mindset.

What can Mary do now? (We will role play this as a group.)

(Discussion question after the role play:)

What is the potential for a successful collaboration?

Community Coalition Case Study

The Chief Judge decides that every judicial district should be active in local community coalitions on domestic violence. He appoints a judge in each district and gives instructions about what he wants them to do in each community.

Paula, the judge in your district, comes to a meeting of your local coalition, explains her priorities, and says that if the coalition isn't interested in incorporating her priorities, she will create a separate coalition.

The coalition wants a united way to work together, so they agree to incorporate what the judge wants to do.

The judge then proceeds to take over the coalition – developing agendas for meetings, preparing the minutes, and sending out notices.

You (local domestic violence program) are the only organization that seems to care. Everyone else is very grateful that someone is taking the initiative to hold the coalition together. But now the coalition just talks a lot and never does much.

1. *As the local domestic violence program, what is your vision for the coalition? Brainstorm ideas in small groups.*
2. *What are the visions of other members of the coalition?*
3. *What is the judge's vision? Brainstorm ideas in small groups.*
4. *What is the common ground among all these visions?*
5. *As the local domestic violence program, what is your strategy to move toward your vision as you work with the coalition?*
6. *What results do you anticipate from this strategy?*

Skills for Successful Collaborations, by Day Piercy

**Evaluation Form
Practice Session on Collaborative Mindset**

- 1. What was the most useful part of the workshop for your work?**

- 2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)**
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:

- 3. Please rate trainer’s teaching/coaching on a scale of 0-5 (5 = excellent)**
Rating: _____
Comments:

- 4. How can the workshop be improved?**

- 5. What is one idea you will begin using immediately?**

- 6. Other comments.** (Please use the other side of the page for additional comments.)

Thanks!

Negotiation Workshop

Objectives:

- **To increase awareness about when to use negotiation, and the mindset required for successful negotiation**
- **To learn and practice a negotiation method**

| | <u>Program</u> | <u>Time</u> |
|---|---|-------------------|
|  | Welcome, introductions, and overview of the workshop | 20 minutes |
|  | Group brainstorm: Characteristics of successful negotiation | 10 minutes |
|  | What is negotiation, and when is it effective to choose to negotiate? | 60 minutes |
| | <i>Break</i> | <i>10 minutes</i> |
|  | Review: Characteristics of the Mindset you need for successful collaboration | 5 minutes |
|  | A Step-by-Step Negotiation Method | 40 minutes |
|  | Assess a Negotiation: Case Study | 20 minutes |
|  | Evaluation and closing – one idea you gained from this workshop and one idea you are going to use right away. | 15 minutes |

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Characteristics of Successful Negotiation

NEGOTIATION WORKSHOP – HANDOUT #3-3

The Role of Negotiation

- When you create referral networks or work with others to coordinate services, you negotiate.
- When you work in collaboration, you negotiate.
- Alternatively, when you don't have the power to negotiate an acceptable agreement, you may choose another strategy. The strategy might be to make demands, confront someone, picket or demonstrate, and/or engage in community organizing.
- Sometimes, in order to gain the power to negotiate, or to make progress when negotiation fails, you may use litigation, mediation, or arbitration. This calls in another level of power – mediators, arbitrators, judges, and juries.
- It is important to know how much power you have in any situation, so that you can select the appropriate response.
- Always start with a negotiation strategy, so that you can find out what is possible as a starting point. Be sure that the people who have the power to make a decision and implement it are at the table.
- Always include a way to monitor progress and assess implementation.

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NEGOTIATION WORKSHOP – HANDOUT #3-4

Case Studies

Case Study #1

The Victim Witness Coordinator in the County Attorney's office is given the authority to create a law enforcement committee of the local community coalition on domestic violence. The local domestic violence program is not invited to be a member. When they ask, they are told this is just for law enforcement.

How would you respond now if you were the local domestic violence program?

Case Study #2

The Department of Children and Families comes to the local domestic violence program with a proposal that you work together to improve integration of domestic violence and child welfare services.

What information would you need in order to decide whether negotiation is an appropriate strategy?

Case Study #3

The only transitional housing program in the community does not accept children. It frequently has openings due to turnover. The local domestic violence program has met with the executive director of the housing program numerous times to request a change in the policy to open the doors to battered women and their children. The executive director says that she understands the concern but they just aren't equipped to handle children. In addition, she is very concerned about the potential for violence if a battered woman lived there and her abuser came after her. She really must think about the safety of other residents in the transitional housing program.

What would you recommend to the local domestic violence program as a next step?

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Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.

- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.

- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.

- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.

- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.

- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.

- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.

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A Step-by-Step Negotiation Method

- Q** The question – frame the issue/problem as a question
??? How can we.....
??? How do we...
??? What is the best way to...
- S** The situation – describe, don't judge
- W** What each wants/needs – NOT the solution
- A** The answer/solution
- A** The action plan: What will be done, by whom, by when
- A** How and when you will assess outcome/commitments/progress

A Step-by-Step Negotiation Method

- Q** The question – frame the issue/problem as a question
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Negotiation Case Study

A group of attorneys has agreed to hold pre-hearing information sessions so that victims of domestic violence will know what to expect in protection order hearings. The Victim Services Committee of your local community domestic violence coalition is discussing where to hold the information sessions.

Committee members have agreed that they need a separate meeting room with babysitting available, a convenient location that is near public transportation. Someone suggests the public library as a meeting place. The domestic violence program advocate reminds the committee that the meeting rooms at the library are a public space. You can't keep anyone out. Perpetrators will be free to come in and that won't be safe for the women.

Someone else says, "You can't keep perpetrators out – an information session must be fair and impartial."

The Child Protection Services worker says, "I also feel it's a problem. We have the same issue of safety in our office. I would like to add to the list of criteria that the location must be safe for victims and that we must uphold the fairness of the judicial process in selecting the place and conducting the information session."

The discussion then focuses on criteria for the meeting place, and the group then selects a location that everyone is comfortable using.

What contributed to the successful negotiation about the meeting place?

Evaluation Form Negotiation Workshop

1. What was the most useful part of the workshop for your work?
2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:
3. Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)
Rating: _____
Comments:
4. How can the workshop be improved?
5. What is one idea you will begin using immediately?
6. **Other comments.** (Please use the other side of the page for additional comments.)

Thanks!

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**Strategic Thinking
Workshop**

Objectives:

- **To increase skills in strategic thinking.**
- **To increase capacity to use a collaborative mindset.**

| Program | Time |
|---|-------------------|
|  Welcome, introductions, and overview of the workshop | 20 minutes |
|  Collaborative mindset characteristics (review) | 10 minutes |
|  Simulation: A meeting with the judge | 60 minutes |
| <i>Break</i> | <i>10 minutes</i> |
|  Simulation: The next coalition meeting | 65 minutes |
|  Evaluation and closing – one idea you gained from this workshop and one idea you are going to use right away. | 15 minutes |

Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.

- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.

- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.

- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.

- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.

- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.

- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.

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Community Coalition Case Study – for Simulation

The Chief Judge decides that every judicial district should be active in local community coalitions on domestic violence. He appoints a judge in each district and gives instructions about what he wants them to do in each community.

Paula, the judge in your district, comes to a meeting of your local coalition, explains her priorities, and says that if the coalition isn't interested in incorporating her priorities, she will create a separate coalition. The coalition wants a united way to work together so they agree to incorporate what the judge wants to do.

The judge then proceeds to take over the coalition – developing agendas for meetings, preparing the minutes, and sending out notices. You (local domestic violence program) are the only organization that seems to care. Everyone else is very grateful that someone is taking the initiative to hold the coalition together. But now the coalition just talks a lot and never does much.

- *Negotiation #1: A meeting with the judge*
- *Negotiation #2: The next meeting of the coalition*

Simulation: A Meeting with the Judge

Roles

- **The judge (played by 4 participants)**

Instructions:

You will play the role of the judge, so you need to define the judge's needs and interests in the coalition and how you will respond to the domestic violence program that has scheduled a meeting with you to discuss the coalition. You also need to set up the physical arrangements for the meeting.

- **The local domestic violence program (played by 4 participants)**

Instructions:

You will play the role of the domestic violence program that wants to activate the coalition. You have decided to meet with the judge to see if you can negotiate a more active role for the coalition. You need to decide how to handle this meeting. Use the negotiation method (Handout #4-6).

- **Other members of the coalition**

Instructions:

Decide your roles as members of the coalition – what is your organization/affiliation, your vision for the coalition, and your interests and needs in participating. You will be observers of the meeting with the judge. Consider how you would respond to what you are hearing in the role you have selected for yourself.

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Simulation: The Next Meeting of the Coalition

Now it's time to prepare for the next coalition meeting. The judge is the chair of the coalition meetings, so participants in the judge role need to decide what to do in the coalition meeting. The domestic violence program's goal is a more active role for the coalition. The domestic violence program needs to decide what to do next based on what was learned in the meeting with the judge. You are free to advocate with other members of the coalition both prior to and during the meeting. Other members of the coalition need to decide how they will participate in the coalition meeting.

- X** You have 15 minutes to prepare for the meeting.
- X** The meeting will be 35 minutes.
- X** We will debrief after the simulation. (*15 minutes*)

Negotiation Steps

- Q** The question – frame the issue/problem as a question
??? *How can we.....*
??? *How do we...*
??? *What is the best way to...*
- S** The situation – describe, don't judge
- W** What each wants/needs – your vision, NOT the solution
- A** The answer/solution
- A** The action plan: What will be done, by whom, by when
- A** How and when you will assess outcome/commitments/progress

Skills for Successful Collaborations, by Day Piercy

Evaluation Form Strategic Thinking Workshop

1. What was the most useful part of the workshop for your work?
2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:
3. Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)
Rating: _____
Comments:
4. How can the workshop be improved?
5. What is one idea you will begin using immediately?
6. Other comments. (Please use the other side of the page for additional comments.)

Thanks!

Skills for Successful Collaborations, by Day Piercy

**Meeting Facilitation
Workshop**

Objectives:

- **To increase knowledge about facilitation techniques for effective meetings.**
- **To practice techniques to promote participation, productive discussion, decision making, and action.**

| | <u>Program</u> | <u>Time</u> |
|---|--|--------------------|
|  | Welcome, introductions, and overview of the workshop | 20 minutes |
|  | Group brainstorm: Characteristics of effective meetings & meeting facilitation | 15 minutes |
|  | Mindset for collaboration and facilitation | 20 minutes |
|  | Facilitation techniques to foster productive discussion and decision making | 35 minutes |
| | <i>Break</i> | <i>10 minutes</i> |
|  | How to preplan a meeting to make facilitation easier, and Techniques to move the meeting forward | 65 minutes |
|  | Evaluation and wrap up Final go around – one idea you gained from this workshop, and one idea you are going to use right away. | 15 minutes |

Skills for Successful Collaborations, by Day Piercy

Characteristics of Effective Meetings and Meeting Facilitators

EFFECTIVE MEETINGS

EFFECTIVE MEETING FACILITATORS

Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Proper Facilitation.** Accept your role as facilitator and understand that you are not the decision-maker, boss or rescuer.
- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.
- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.
- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.
- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.
- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.
- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.
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Skills for Successful Collaborations, by Day Piercy

Facilitation Mindset Case Studies

Case Study #1

After a lot of discussion, the work group has decided to proceed with four projects. Everyone agrees except Rose, who thinks this is too much to undertake effectively. The group has tried to convince Rose that this is the best way to proceed, and now they are growing impatient with her opposition. Nancy, the facilitator, values Rose’s opinion more than that of anyone else in the group, so she suggests to the group that Rose is probably right. It really is too much work. Then she asks the group, “How do you want to proceed?” No one speaks.

What is Nancy’s mindset as a facilitator? How could she have handled this situation more effectively?

Case Study #2

Brenda is facilitating a meeting, putting ideas on flip chart pages. Julie makes a suggestion, and Brenda says, “Let me summarize what you are saying.” She writes down an idea. Julie says, “That’s not at all what I meant.”

What is Brenda’s mindset? How could she have handled this situation more effectively?

Case Study #3

The community coalition meeting is going around and around, getting nowhere. The county attorney has suggested that they go to the legislature to advocate for funds for drop-in day care so that women will have a place for their children to stay when they come to court. The local domestic violence program responded that this funding had been available, but the state legislature eliminated it 6 years ago. Various coalition members have made comments about the problems with the state legislature, the need for day care, and have described the problems women are facing. No one agrees about what to do. Mindy, the facilitator, grows more and more frustrated. Finally, in desperation, she says, “Okay, there’s no point in discussing this any longer. The state legislature already has taken away this money.”

What caused Mindy’s reaction? How could she have handled this situation more effectively?

Case Study for Participation/Discussion Techniques

In a meeting of the education committee of the local domestic violence coalition, representatives of the police, county attorney's office and judges suggest that they launch a community education initiative on domestic violence.

The representative of the local domestic violence program explains that they (domestic violence program) already are engaged in community education and this would be duplicative. Other committee members respond that there never can be too much community education.

The domestic violence program representative then suggests that training be conducted for those who will be doing community education. The others reply that they don't need any training.

The domestic violence program representative responds that she can't put her stamp of approval on the education program because she doesn't trust what people will say about domestic violence unless they are trained.

The education committee decides to launch the education initiative.

What meeting facilitation techniques could have made this a more productive discussion?

Techniques To Promote Productive Discussion

Discussion questions:

??? *What is our vision for (e.g., services, for this coalition, for this initiative)?*

??? *What are criteria for a good decision?*

??? *What are options for?*

Brainstorming and “Dots” Exercise

For agenda items requiring an initial list of ideas, options, recommendations.

Use Right Brain Activity To Tap Creativity

During the meeting, create some activity that engages participants’ “right brain” in order to tap creativity. For example, ask participants to select a symbol of your goal (e.g., an animal, image, or object). Or give participants materials to create some thing to symbolize a positive outcome or your problem solved.

Participation Techniques

- No one speaks a second time until everyone has a chance to speak once.
- In meetings of fewer than 15 participants, go around the table and ask each person to suggest one idea (or pass if they choose to) or to state an opinion on a subject under discussion.
- Work in small groups for a short period of time – give groups a specific task.
- Use a round robin report back – one idea from each group until all ideas are presented.

To Debate Options and Build Consensus

- One-minute promotion – one option at a time (all who want to promote the option get 1 minute each to promote it; then move to the next option).
- Alternate pro and con 1-minute statements for each option – one option at a time.
- If most are in agreement and a few disagree, ask those who disagree to suggest another option.
- If one or two participants continue to disagree, ask, “Can you go along with the consensus? I’m not asking you to change your position. I’m asking if you are willing to go along with the consensus?”
- Vote by super majority, if it becomes necessary to vote (for groups that do not have consensus decision making).

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Case Study for Brainstorm & Dots Exercise

Tomorrow is the next meeting of the education committee described in Handout #5-5. The agenda is to plan the education initiative. You (the local domestic violence program) are strategizing about what to do in the meeting.

Select an animal, image, or object that symbolizes a successful resolution of the situation with the education committee. (Example of right brain creativity exercise.)

Instructions for Brainstorm and Dots Exercise

This exercise is useful when you want to:

- Encourage participation by everyone and better understand everyone’s opinions about ideas or actions being discussed,
- Test one or more ideas to see if others will select your ideas as priorities,
- Find out what ideas or actions have the greatest support in the group,
- Build consensus, or
- Generate an initial list of ideas that will then be referred to a subcommittee for more discussion and to define options for consideration by the whole group.

The group brainstorm is limited to 15-20 minutes. All ideas are recorded on flip chart paper and there is no discussion of any idea during the brainstorming. (REMEMBER, there is NO discussion of any idea during the brainstorming.)

Following the brainstorm exercise, give each participant 5 “dots” (stationery stores carry these colored “dot labels.”). Participants select their top 5 priorities on the list of items generated in the group brainstorm. (Put one dot next to each of the 5 priorities selected.)

If there are fewer than 15 items on the brainstorm list, use 3 dots instead of 5. Then select the 3 top priorities. Yes, there will be duplicates or similar items on the list. Proceed with the “voting” first. Combine ideas later.

After the “dots” exercise, ask for proposals to combine items. The “rule of combining”: items are combined only if everyone agrees. This rule avoids arguing and discussion during this sorting process. Do not discuss proposals. This is meant to be a fast exercise to determine if there is immediate consensus to combine any items. It’s also a great reminder about respecting differences of opinion.

When the combining exercise is completed, usually 3-5 priorities emerge. You then can refine the priorities and, if there is time, develop a work plan or refer them to committee for further work and move on to the next agenda item.

This brainstorm and dots exercise is an excerpt from *Day’s Tools for Groups*, by Day Piercy, A CreateNet® publication, Copyright 1996. All rights reserved. The publication is available from CreateNet, Inc. 1417 Sadler Road #378 Fernandina Beach, FL 32034.

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MEETING FACILITATION WORKSHOP – HANDOUT #5-9

Exercise on Planning a Meeting

You are a planning committee that has been asked to plan and facilitate the meeting of the education committee (the meeting you have just strategized about as the domestic violence program – the dots exercise).

- Use Handout #5-10 to plan the agenda. (We will walk through this together.)
- Use Handouts #5-6 and #5-8 to help you develop the facilitation techniques you will use.
- Write your agenda on flip chart paper.
- Report back: Each group will have 5 minutes to answer these questions:

?? What is your agenda for the meeting?

?? What techniques will you use? Why? (See Handouts #5-6 and #5-8.)

?? How will you move the meeting along? (See Handout #5-11.)

There will be a prize for the agenda voted most likely to succeed.

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MEETING FACILITATION WORKSHOP – HANDOUT #5-10

Planning a Meeting

Define the desired outcome of the meeting – keep this in focus as you plan the agenda. If, right now, you were at the end of the meeting you are planning, what would have made the meeting a productive use of people’s time and energy?

- List all agenda items in these categories:
 - ✓ Information items:
 - ✓ Brainstorm items (brainstorm only and refer to committee/individual for more work):
 - ✓ Discussion items (refer to committee/individual for more work):
 - ✓ Decision items:
 - ✓ Next steps:
- Decide what items must be covered. Create a time allocation for each item to ensure that you have time for all items. Develop a written agenda with the items and time allocations.
- Define meeting roles and who will fill them.
- Decide what information people need in advance to make this a productive meeting.
- Define meeting logistics and who will handle them (e.g., place/equipment, refreshments, and meeting notice & agenda/materials to participants).
- Next steps: Define tasks you know in advance will need to be assigned. (Add others at the meeting as you proceed, and summarize at the end of the meeting.)

Techniques To Move a Meeting Forward

- Written, timed agenda – keep referring to it and proposing to move along as the time limit nears.
- Introduce agenda items by defining the desired outcomes (e.g., provide information, brainstorm ideas and refer to committee, discuss committee work/send back to committee, make a decision.)
- Send to committee/small group for further development.
- If the group gets stuck on one item, proceed to the next item and come back to the stuck place later in the meeting. Make sure you return to the item later.
- Pay attention to the group's energy - you will see when the group is ready to move ahead.
- Respond firmly to any disruptions. Avoid blaming or personal attacks.
- If someone persists in disrupting the meeting, ask the group to decide - to move on or deal with the issue being raised.

Evaluation Form Meeting Facilitation Workshop

1. What was the most useful part of the workshop for your work?
2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:
3. Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)
Rating: _____
Comments:
4. How can the workshop be improved?
5. What is one idea you will begin using immediately?
6. Other comments. (Please use the other side of the page for additional comments.)

Thanks!

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MODULE #6 - HANDOUT #6-1

**Practice Session on
Meeting Facilitation Skills**

Objectives:

- **To increase meeting facilitation skills.**
- **To apply facilitation techniques to promote participation, productive discussion, decision making, and action.**

| | Program | Time |
|---|--|-------------|
|  | Welcome, introductions, and overview of the workshop | 20 minutes |
|  | Mindset for successful collaborations, and Facilitation mindset (review) | 20 minutes |
|  | Meeting simulation | 60 minutes |
|  | Simulation debriefing | 35 minutes |
|  | Evaluation and closing Final go around – one idea you learned and one idea you are going to use right away. | 15 minutes |

 *Note:* This module is shorter in length to accommodate a three-day training program. Time is available to reflect on the entire training program and to develop an action plan for returning to everyday work.

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Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Proper Facilitation.** Accept your role as facilitator and understand that you are not the decision-maker, boss or rescuer.

- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.

- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don't decide in advance that nothing can work.

- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.

- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.

- ◆ **Curiosity.** Maintain a curious/investigating attitude about others' needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others' motives and meaning.

- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others' needs.

- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.

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PRACTICE SESSION ON MEETING FACILITATION SKILLS – HANDOUT #6-3

Planning a Meeting

Define the desired outcome of the meeting – keep this in focus as you plan the agenda. If, right now, you were at the end of the meeting you are planning, what would have made the meeting a productive use of people's time and energy?

- List all agenda items in these categories:
 - ✓ Information items:
 - ✓ Brainstorm items (brainstorm only and refer to committee/individual for more work):
 - ✓ Discussion items (refer to committee/individual for more work):
 - ✓ Decision items:
 - ✓ Next steps:
- Decide what items must be covered. Create a time allocation for each item to ensure that you have time for all items. Develop a written agenda with the items and time allocations.
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- Next steps: Define tasks you know in advance will need to be assigned. (Add others at the meeting as you proceed, and summarize at the end of the meeting.)

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Techniques To Promote Productive Discussion

Discussion questions

??? *What is our vision for (e.g., services, for this coalition, for this initiative)?*

??? *What are criteria for a good decision?*

??? *What are options for?*

Brainstorming and “Dots” Exercise

For agenda items requiring an initial list of ideas, options, recommendations.

Use Right Brain Activity To Tap Creativity

During the meeting, create some activity that engages participants’ “right brain” in order to tap creativity. For example, ask participants to select a symbol of your goal (e.g., an animal, image, or object). Or give participants materials to create something to symbolize a positive outcome or your problem solved.

Participation Techniques

- No one speaks a second time until everyone has a chance to speak once.
- In meetings of fewer than 15 participants, go around the table and ask each person to suggest one idea (or pass if they choose to) or to state an opinion on a subject under discussion.
- Work in small groups for a short period of time – give groups a specific task.
- Use a round robin report back – one idea from each group until all ideas are presented.

To Debate Options and Build Consensus

- One-minute promotion – one option at a time (all who want to promote the option get 1 minute each to promote it; then move to the next option).
- Alternate pro and con 1-minute statements for each option – one option at a time.
- If most are in agreement and a few disagree, ask those who disagree to suggest another option.
- If one or two participants continue to disagree, ask, “Can you go along with the consensus? I’m not asking you to change your position. I’m asking if you are willing to go along with the consensus?”
- Vote by super majority, if it becomes necessary to vote (for groups that do not have consensus decision making).

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Techniques To Move a Meeting Forward

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- Introduce agenda items by defining the desired outcomes (e.g., provide information, brainstorm ideas and refer to committee, discuss committee work/send back to committee, make a decision.)

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- If the group gets stuck on one item, proceed to the next item and come back to the stuck place later in the meeting. Make sure you return to the item later.

- Pay attention to the group's energy - you will see when the group is ready to move ahead.

- Respond firmly to any disruptions. Avoid blaming or personal attacks.

- If someone persists in disrupting the meeting, ask the group to decide - to move on or deal with the issue being raised.

Case Study

In a meeting of the education committee of the local domestic violence coalition, representatives of the police, county attorney’s office, and judges suggest that they launch a community education initiative on domestic violence.

The representative of the local domestic violence program explains that they (domestic violence program) already are engaged in community education and this would be duplicative. Other committee members respond that there never can be too much community education.

The domestic violence program representative then suggests that training be conducted for those who will be doing community education. The others reply that they don’t need any training.

The domestic violence program representative responds that she can’t put her stamp of approval on the education program because she doesn’t trust what people will say about domestic violence unless they are trained.

The education committee decides to launch the education initiative. At the next meeting they will discuss ideas about what should be included in the initiative.

The agenda for the meeting includes these items:

- Introductions and announcements
- Suggestions for the education initiative
- Next Steps

We will simulate this meeting with co-facilitators. Three participants will be from the domestic violence program. Other participants will decide their roles.

Evaluation Form
Practice Session on Meeting Facilitation Skills

1. **What was the most useful part of the workshop for your work?**

2. **Please rate the following using a scale of 0-5 (5 = very helpful and useful)**
Presentations _____
Relevance/usefulness of case studies _____
Handouts _____
Role plays, if used _____
Other comments/ratings:

3. **Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)**
Rating: _____
Comments:

4. **How can the workshop be improved?**

5. **What is one idea you will begin using immediately?**

6. **Other comments.** (Please use the other side of the page for additional comments.)

Thanks!

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