Collaboration: Engaging Members and Partners

Shannon Studden
Program Specialist II
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Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are the nation’s leading technical assistance and knowledge centers in rural health. In partnership with The Center, RHI connects rural health organizations with innovations that enhance the health of rural communities.
Summit Findings: Six Common Roles of Networks

- Serving in a leadership capacity
- Facilitating continuous planning
- Identifying and providing meaningful education
- Connecting resources
- Collecting, analyzing and acting on data
- Convening and engaging stakeholders
<table>
<thead>
<tr>
<th><strong>Key network initiatives and actions</strong></th>
<th><strong>Resources to support network leaders</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Building trust with consistent opportunity for dialogue</td>
<td>Help with documenting and communicating network mission, vision and planning efforts</td>
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<tr>
<td>Be transparent to community members and stakeholders about network mission, vision, strategic objectives and key initiatives to answer questions about what, how and why</td>
<td>Technology to support collaboration and communication efforts, i.e. collaboration software, website and social media</td>
</tr>
<tr>
<td>Provide education on what network is and its benefits to members for participating in network initiatives, projects and services</td>
<td>Process to identify “what’s in it for me” to help get organizations and providers to the table</td>
</tr>
<tr>
<td>Establish neutrality as a guiding principle of the network</td>
<td>Dashboard to identify critical measures; brag about successes to communicate value</td>
</tr>
</tbody>
</table>
Shannon Studden

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- Program Development Manager, University of Minnesota Duluth Continuing Education
- Sr. Manager Talent Management & Leadership Development, Cleveland-Cliffs
- Instructor, University of Minnesota Duluth Labovitz School of Business & Economics
- M.S., Industrial/Organizational Psychology
- Certified Professional in Human Resources
Learning Objectives

• Understand the factors that promote and inhibit engagement
• Adapt approaches and plans to meet the needs of stakeholders
• Plan and lead meetings that encourage engagement
OR – We’ll Answer These Burning Questions

• What promotes engagement? What gets in the way?
• How can I figure out what’s important to my stakeholders, and what can I do to tap into what’s important to them?
• What can I do before and during meetings to encourage engagement in the moment?
Let’s Agree…

Collaboration: Working together to achieve a goal

Stakeholders: Anyone actively participating in the work of the network

Engagement: Commitment to the network’s goals and a willingness to participate in activities that help achieve goals
What Does Engagement Look Like?

**SAY**  Speak positively about the network
Advocate for the network

**STAY**  Continue to participate in meetings and activities after initial launch

**STRIVE**  Speak up in meetings
Propose ideas
Volunteer to contribute
Follow through on commitments

Source: Aon Hewitt
Your Role in Engagement

Ensure the environment is set up to increase the odds that stakeholders will feel and do what you’re hoping for.
What do we know about collaboration and engagement in groups?
Engagement Leads to Outcomes

Variety of:
- Mindsets
- Perspectives
- Expertise
- Skills

Complex problem

Goals met/exceeded
Fewer missteps
Stronger relationships
Summit Participants’ Feedback

- Shares the workload of change
- Shares issues that amplify the needs of members
- Increases
  - Political voice & credibility
  - Opportunities for funding
  - Innovation
  - Community access to care
  - Connection with and access to subject matter experts
What Promotes Engagement? The Foundation

- I have a clear understanding of the vision
- I know why I’m part of the group
Shoring Up the Foundation

Ask:

• How does the vision describe what we want to become?
• Do we feel that our goals and activities are aligned with the network’s mission and vision?
• What unique contribution do each of us make to the achievement of the our mission and vision?
What Promotes Engagement? The Building Blocks

- I feel that the group’s values are in line with mine
- I feel valued by the group
Strengthening the Building Blocks

Revisit the network’s mission and vision

Ask:

• What about the mission and/or vision resonates with you?
• What aspects of the vision are meaningful or exciting to you?
• How do the mission and vision overlap with your goals?
Connecting the network to the stakeholder: Stakeholder analysis
Stakeholder Analysis

Making a concrete connection between the stakeholder and the work of the network

Explicit vs. Not Implicit
Stakeholder Mapping

Project's Impact on Stakeholder

Influence on Project

L  M  H
L   M   H
H   M   H

Enthusiast
Neutral
Opponent
Stakeholder Mapping Example

Influence on Project

<table>
<thead>
<tr>
<th>H</th>
<th>M</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe</td>
<td>Eve</td>
<td>Kim</td>
</tr>
<tr>
<td>Dan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lori</td>
<td>Scott</td>
<td></td>
</tr>
</tbody>
</table>

Project's Impact on Stakeholder

- Enthusiast
- Neutral
- Opponent
1. What’s important to him/her?
2. What does the network need from him/her?
3. How will the work of the network help him/her with what’s important to him/her?
4. How can I (or others) clearly communicate the connection between the work of the network and what's important to him/her?
5. How can I (or others) modify what we're doing to fully connect the work of the network to what's important to him/her?
6. How will I know I'm making progress?
1. What’s important?
2. What does the network need?
3. How will the work of the network help?
4. Clearly communicate the connection?
5. Modify what we're doing?
6. How will I know I'm making progress?

1. Financial outcomes
2. Funding commitment
3. Increased reimbursement rate
4. Highlight increase in reimbursements by a comparison program
5. Move reimbursement-related activities earlier in timeline
6. Increased attendance at meetings
What looks like a people problem is often a situation problem.

~ Chip and Dan Heath, Switch
Engagement in Meetings

Planning and leading meetings to maximize stakeholder engagement
Engagement in Meetings: Still…

• Clear understanding of the goal(s) for the meeting
• Know why I’m here
• Feel that the group’s values and goals align with mine
• Feel valued by others in the group
Engagement in Meetings: Preparing

Agenda
• Topics to be discussed
• Decisions to be made
• Time allocated to each
• Name(s) of those responsible

Send draft ahead of time

Connect with stakeholder priorities

Be realistic about timing
Agenda for the OPEN Board of Directors
Friday September 6, 2013
10:00 a.m. to 12:00 noon with lunch to follow

Location: Network Office & Training Center, City, State

Participation: When a Member’s designated Board Director cannot attend, sending an Alternate Director is strongly encouraged. Assuming primary Director authorization, he/she will have full voting rights.

Ground Rules: Everyone Participates – No One Person Dominates
An Individual’s Silence Will be Interpreted as Agreement
Listen as an Ally -- Work to Understand Before Evaluating
Helps to Assume Positive Intent First When Things Go Wrong
Please Minimize Side Conversations

10:00 am OPEN Board of Directors Call to Order (Board President) Enclosure #1
• Check In with Members who are participating from remote locations
• Consent Calendar – The below consent agenda includes items for approval as well as items received. A Member may request any time on the consent agenda to be removed for separate consideration; it will then be considered after the consent agenda is adopted.

For Approval
• Board Agenda (Members are encouraged to contact OPEN staff or the
Agenda Title Here

Date: x/x/xx

Time: 9am to 1:00pm (CST).

Location: Conference Room A

Meeting Purpose:
The overall expected outcome of the session is......

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Outcome</th>
<th>Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Review action items from last meeting</td>
<td>Share information/status &amp; clarify understanding</td>
<td>ML</td>
</tr>
<tr>
<td>10</td>
<td>Meeting topic #1</td>
<td>Share information/status &amp; clarify understanding</td>
<td>ML</td>
</tr>
<tr>
<td>15</td>
<td>Meeting topic #2</td>
<td>Discuss &amp; decide</td>
<td>ML</td>
</tr>
<tr>
<td>10</td>
<td>Meeting topic #3</td>
<td>Discuss &amp; decide</td>
<td>ML</td>
</tr>
<tr>
<td>5</td>
<td>Review &amp; document all action items identified (who, what &amp; by when: 3Ws)</td>
<td>Clarify &amp; verify 3Ws identified</td>
<td>ML</td>
</tr>
</tbody>
</table>

Action Item 3W’s:

<table>
<thead>
<tr>
<th></th>
<th>Who</th>
<th>What</th>
<th>When</th>
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<tbody>
<tr>
<td>1</td>
<td>Bill N.</td>
<td>Action example</td>
<td>6/10/15</td>
</tr>
<tr>
<td>2</td>
<td>Sue B.</td>
<td>Action example</td>
<td>5/31/15</td>
</tr>
<tr>
<td>3</td>
<td>Sue B.</td>
<td>Action example</td>
<td>6/14/15</td>
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Engagement in Meetings: During the Meeting

Start and end the meeting on time

Follow the agenda as closely as possible allowing some flexibility

Questions
• Ask open ended questions
• Pause after asking a question – resist the urge to fill the silence
• Avoid sharing your perspective first
• Call on quiet people
• Ask everyone to write down their top ideas, then go around the group to share
During the Meeting: Additional Tips

Dominant group members: “Thanks for sharing your perspective, Joe. Let’s hear what others have to say.”

Tangents: Parking lot and/or offline chat, etc.

Before adjourning, review list of action items: Who’s going to do what, and by when?
During the Meeting: Sharing Credit

Offer and/or share credit for ideas

Accept less than your share of the credit, and more than your share of the blame.

~ Arnold H. Glasow
Engagement in Meetings: After the Meeting

Distribute meeting notes
Include action items
Remote Meeting Participants

- Provide copies of all materials beforehand
- Start on time or 1 minute late
- Set ground rules
- Late joiners
- Allow sufficient pauses after asking a question
- Minimize noise
- Ask remote participants for input
Helpful Resources

Books
B. Kim Barnes, *Exercising Influence*
Chip & Dan Heath, *Switch*
Patrick Lencioni, *The Five Dysfunctions of a Team* (includes team assessment on each of the 5 dimensions and suggestions for overcoming)
Mario Moussa, *Committed Teams*

The Center’s Website
Network Aim for Sustainability Portal: Collaboration
Building Commitment Through Group Decision-Making
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sstudden@ruralcenter.org

Get to know us better:
http://www.ruralcenter.org