Community Action Team (CAT) Knowledge Exchange Meeting Facilitation Skill Sheet

Developing Agendas

Activity	Description
Choose an agenda format	Issues • An agenda informs participants what to expect from a meeting, highlighting topics they may care about. • An agenda can be used to improve the engagement of participants, so the collaboration meets objectives, by using the limited time together appropriately. A facilitator can use the agenda to keep meetings on track. Ideas • **Description**: Concise details of what the agenda item is and the activity taking place in the meeting (the activity may be a presentation). • **Responsibility**: Who is speaking and leading the activity. • **Time**: Estimated duration, those who are 'responsible' need to prepare for this amount of time. • **Action**: For participants to be 'Informed', to have a 'Dialogue', or to make 'Decisions' (choose at least one). • **Attachments**: Option to provide links to background documents or shared slides.
Setting agenda items	Issues • Effectively planning how to use the time during a meeting allows a CAT to progress on its goals. • Leadership is needed to equitably engage members, so the objectives of meetings meets people's goals. • Ongoing feedback is required to determine if the planning decisions for an agenda have been effective. • If an agenda seems too focused on a very specific topic, engagement may be lower. • Do not rely on getting agenda items from only a broad email request; you need to reach out directly to people. Ideas • Request agenda items at the previous meeting. Maintain a tracking spreadsheet of requests for planning and managing communication with members' requests. • Reach out directly to specific members for agenda items. This can be valuable to improve their engagement or to meet specific CAT goals. • Months could have themes that are currently relevant to the community. • Send out the agenda 1 to 2 weeks in advance of the meeting.

Following Agendas and Meeting Agreements

Activity	Description
Following agendas	**Issues** • Objectives of a meeting may not be met if speaking and discussion time is not adequately managed. • People may begin dialogue in areas that are not progressing the current agenda items. • Members lose engagement if the expectations of a meeting's objectives are not met. • Overly rigid agendas may undermine in-the-moment collaboration. **Ideas** • Opportunities for valuable collaboration cannot always be predicted. Provide space for dialogue and if an agenda item sparks a lot of discussion, a facilitator can adapt the agenda. • Agenda's need buffer space to allow for changes on-the-fly, as well as knowing which items could be shifted to future meetings. • Prioritize agenda items, so if time runs out the last items can be postponed. For example, "Check-ins" may not be necessary every meeting and could be used as a buffer time.. • Speakers need to be informed that the allotted time is firm and to prepare accordingly. Ask them to watch their own clock to self-manage their speaking time. If the objective is to have discussion, *politely* interrupt the speaker to effectively transition to discussion or decisions. • If there are discussions, fairly distribute speaking. This will be a learning process. Be open to feedback to improve how to manage discussions. • Use a Meeting Agreement so members know what is expected of them when they speak. Facilitators can point to the agreement when managing people.
Implementing Meeting Agreements	**Issues** • CATs bring together a broad group of individuals and organizations. Creating a meeting space that encourages participation of diverse voices, from peers to providers, needs active facilitation. • Facilitation is more effective when each member understands what is expected of each other, through mutual agreement of conduct. **Ideas** • Develop a simple and clear set of agreements that can act as guides for everyone to follow and allows a facilitator to use when politely moderating discussions. • Start each meeting with a reminder of some of these key statements from a Meeting Agreement. • Use a meeting to discuss what your CAT would like on its Meeting Agreement. Based on ongoing feedback, improve your agreement to better support your CAT.

	• Example from the Comox Valley Substance Use Collaborative: **MEETING AGREEMENTS** - How we want to be together: **In a safe space** - Create a safe space for everyone to our best ability. **Demonstrate compassion & respect** - For all people. **Power dynamics** - Be aware of implicit imbalances and adjust in good faith to our best ability. **Mindful of the space we take** - Time is a precious resource, lean back if outgoing or lean forward if quiet. **Own your experience** - No need to represent anyone other than yourself - use "I" statements. **Agree to disagree** - Acknowledge, affirm, respect diversity in the room - agree to disagree. **Practice self care** - Stand, sit, stretch, eat, yawn, take a bio break if you need it. **Suspend criticism** - Within ourselves and towards one another. **Learning** - Share knowledge, listen to each other, explore new ideas and generate new understanding. **Show up** - Bring your authentic self and be present, put your phones on silent and close your e-mail. **Confidentiality** - Free to use information, but do not reveal who made any comment. **Plain Language** - Use plain language. **Anti-stigmatizing Language** - Use language that does not stigmatize people who experience substances. **Scent-free space** - Be aware of other's health concerns/allergies - no perfume/other scents or smoking before meeting. Trust the process, and yourself!

Planning for Group Discussions and Activities

- Group activities can be planned for a CAT meeting to improve collaboration and participation during meetings.
- Try to attach a group activity to an agenda item where the speaker would benefit from hearing diverse perspectives.

Activity	Description	Resources
Zoom breakout rooms	Issues • Participants may be less comfortable speaking up in a larger group setting. • Building relationships can be difficult in large groups versus smaller group conversations. • Productive discussions can be challenging in large groups.	[Managing meeting breakout rooms] [Meaningful territorial acknowledgement]

	Ideas • Set aside 10-to-15-minutes for small group, breakout room discussions. • Each group should have 4 to 6 people max. • Start with introductions, each person could try doing a territorial acknowledgement. • Pose a common question for all groups to talk about (for example, "What are strengths & assets in our community?"). • This can be used as an Icebreaker activity, such as a 'Human Being / Human Doing' discussion, where each person shares something they have recently done in their personal life and then something from their work life. • After the breakout rooms, if appropriate, allow each group to share key insights from their discussions. • This could be done in-person, creating small circles of chairs.	
Group dialogue, ideation or analysis	Issues • Looking for other ways to foster a more engaging dialogue. • Group ideation or brainstorming on a specific topic. • Analysis of an issue with multi-partners and perspectives. Ideas • See **Appendix A** – Sample of Group Activities, which could be used for smaller CAT working groups or for a larger CAT meeting. • These activities may be useful for hosting Community Dialogues.	[Activities for Transforming Teams & Igniting Change] [Ideas to Implementation] [Liberating Structures App]

Creating Safe Spaces

Safety is **avoiding harm** and **fostering security** [BC Healthy Quality Matrix],

- Safe environments ensure both actual and perceived physical, cultural and psychological safety.
- **Cultural safety** is an outcome based on respectful engagement that recognizes and strives to address power imbalances inherent in the health care system. It results in an environment free of Indigenous-specific racism and discrimination, where Indigenous people feel safe when participating with the CAT.
- **Psychological safety** is broadly defined as a climate in which people are comfortable expressing and being themselves, sharing concerns and mistakes without fear of embarrassment or retribution, and asking questions when they are unsure about something.

Issues

- The toxic drug crisis has deeply affected people, creating feelings of grief and anger to sadness and frustration. We cannot know how any one person has been affected. Everyone deserves kindness and respect, a safe space to participate in the CAT.
- For some, meetings may pose physical safety issues, such as a trauma being relived leading to unplanned substance use. Support for using substances can mitigate harm.
- Fostering security may be through psychological safety, allowing all members, from peers to providers, to feel welcome to participate.
- CAT meetings are not a place for shaming or blaming an individual. Inviting partners to engage during a meeting is an opportunity to improve mutual understanding and develop ideas together. Not everyone may be at the same place of learning on how to respond to the toxic drug crisis.
- Posting meeting notes to social media, or in a public forum, may pose safety concerns, with comments taken out of context.

Ideas

- Develop a **Safety & Security Questionnaire** for members to share their needs and ways in which the CAT can foster safety. The questionnaire could be used with new members, to open a conversation.
- Connect with a **Provincial Overdose Mobile Response Team** (MRT) member, to provide supports for CAT meetings.
- **Cultural Safety** is a distinct and necessary outcome for all meetings. To start, follow the [Culturally Safe Engagement] guide. Develop trust over time with Indigenous members to invite ongoing feedback. Cultural safety can only be defined by the Indigenous person in the situation.
- Follow **Meeting Agreements** to foster psychological safety for all members, from peers to providers, allowing for respectful dialogue without fear of embarrassment or retribution.
- Define the safety roles and responsibilities for the CAT Coordinator, potentially creating a Peer Support role for meetings. Safety issues should be brought up with ongoing feedback from members.

De-Escalation of Conflict

Issues

- Expressions of frustration and anger are appropriate in many situations during a CAT meeting.
- Situations can occur where individuals may begin to raise their voices and move from expressing anger to being on a 'soapbox', expressing sustained hostility. A facilitator needs to respond for the sake of others in the group, to reduce potential harm to members.
- Engagement and participation with a CAT may suffer if conflict is left unmanaged.

Ideas

- Give space for expressions of frustration and anger. Many topics that are discussed can carry injustices and stigma. Anger can be appropriate. Moderate the dialogue using a Meeting Agreement and by using the skills below. Keep meetings on-track, which are not focused on any one person's specific emotional reaction.

- [Dealing with Different Types of People], the "Angry" or hostile person:
  - Do not get angry yourself.
  - Use a low quiet voice.
  - Validate the persons perceptions, interpretations, and emotions where you can.
  - Try to listen attentively and paraphrase the person's comments/statements to better understand what they are saying.
  - **If the angry person attacks another participant verbally, stop the behaviour immediately by saying, "There is no place for that kind of behaviour in this group. We want to respect each other's views".**
  - Ask the person what would make them "happy" and refer them onto that.
- [Dealing with Difficult Group Members] or see **Appendix B** for the text.
- Facilitators need the ability to mute participants on Zoom and can recommend that escalating discussions be taken 'offline' or 1:1 outside of the meeting.
- It is okay if an escalation occurs and it is not handled well in the meeting, no facilitator is perfect! The important step is to connect with those in conflict after the meeting and facilitate resolution. Secondly, follow-up with the entire CAT at the next meeting. The facilitator could tell everyone simply, "We addressed the conflict that occurred at the previous meeting, and it has been resolved. Please feel free to connect with me after this meeting if you have any further concerns about what happened."

Appendix A – Sample of Group Activities

Activity	Description	Specifications
Six Thinking Hats *Group analysis*	Fosters creativity and can identify gaps of a current view. Comments are made wearing different 'hats'. People can take on specific 'hats' separately, or the group can go through each 'hat' together. *White: What further information is needed?* *Yellow: Positives/Benefits?* *Black: Drawbacks/Risks* *Red: What does your gut say?* *Green: What are the other alternatives or possibilities?* *Blue: Are we staying on track? Next steps...* Worksheet, Six Thinking Hats [From Ideas to Implementation]	Any group size Virtual or in-person 30 minutes
Look Before You Leap *Group decisions*	Asses team goals and decisions. People respond to questions, such as: • Who are we designing this solution for? • What is the problem we are trying to solve? • How are we uniquely positioned to solve this issue? • How are we measuring success? See [ATTIC Cards] for a detailed description.	Any group size Virtual or in-person 30 – 60 minutes
Kill the Elephant *Group dialogue*	'Doubts' conversation. Everyone provides responses to a list of questions, with voting. • What do I dislike? • How will this end in disaster? • What are my fears? • What are the risks? • What am I sick of hearing?	4 – 8 people Virtual or in-person 15 – 30 minutes
Three Ws *Group dialogue*	To improve communication during a dialogue. Ask each person to respond, "What I see" "What I am concerned about" and "What I want". Worksheet, [Three Ws Overview]	Any group size Any format

Appendix B – Dealing with Difficult Group Members

This is taken from In Mixed Company: Small Group Communication by J. Dan Rothwell, Harcourt and Brace publishers.

How do you deal with difficult group members? Individuals who create turmoil in the group by engaging in chronically disruptive behavior, or whose communication behavior is chronically inappropriate offers a challenge. Since groups are systems composed of interrelated parts, one competitive member can influence the entire group. It's been discovered that when one group member is highly competitive, formerly cooperative members begin behaving in competitive ways also. This is especially true when the competitive member is not dealt with effectively by the group.

There are several fundamental steps that should be taken by the group when dealing with a difficult member. This action plan is derived from research, experience, observations, and from consulting the work primarily of psychologist Robert Bramson.

1. Make sure your own house is in order. Has the group made a genuine effort to create a supportive, noncompetitive climate? If not, then refrain from looking for scapegoats to blame for group disharmony and conflict. The problem is you. Get busy and clean up your environment. You can hardly expect others to be supportive and cooperative when you haven't made the effort yourself.

2. Stop wishing that difficult individuals were different. Chronic behaviors have been learned, usually over long periods of time. If your disruptive member is a bigot, don't expect to change him or her into a generous, open-minded person. Change your communication in relation to that person's difficult behavior. Communication in-groups is a transaction operating within a system. What one party does affects the other parties. You may change the troublemaker's behavior toward the group, even though you will not likely change him or her from a difficult person into a likeable one. So how do you act in relation to the difficult member so the problem person becomes less of a disruption? Consider the next step.

3. Try not to encourage the disruption. There are several common ways that groups unwittingly encourage the disrupter. Avoid the following:

   o Don't placate the troublemaker. Permitting frequent interruptions from the offending party, enduring this ploy for conversational control, is a strategy of appeasement will little potential for success. Allowing the disrupter to manipulate the group in order to "keep the peace" rewards the troublemaker for objectionable behavior.

   o Refuse to be goaded into a reciprocal pattern. Resist the very real temptation to meet firepower with firepower. Becoming aggressive with aggressors escalates into intractable power struggles. Keep telling yourself that if you do, you're engaging them on their terms and on their familiar ground, to your disadvantage. Resisting the temptation to fight fire with fire requires self-control.

   o Don't provide a soapbox for the troublemaker. Aggressors are more than happy to mount the soapbox and focus attention on their personal agenda. Defer the confrontation if possible, you can't ignore disruptive behavior especially when it becomes chronic, but sometimes you can defer it to a more appropriate time and place.

4. Attempt to convert disruption into a constructive contribution. For example you could attempt to divert the disrupter away from abusive remarks and toward constructive contributions to the group by responding, "Perhaps you could provide a better solution." By requesting a pertinent contribution you substantiate comments in a group discussion and encourage a focus on content not on relationship conflicts. Disrupters are less likely to continue their abuse when they are focused on the substance of the discussion.

5. Confront the difficult person directly. If the entire group is upset by the behavior of the difficult person, then the group should confront the disrupter. Confrontations, of course, should be descriptive, not evaluative. Even when there is a power disparity, such as when your supervisor in your work group is the difficult person, confrontation is important.

6. Separate yourself from the difficult person if all else fails. Communication is not a panacea for every problem that comes up in groups. Some individuals leave no other option except ostracism (a competitive choice) by the group. If the difficult person is powerful, however, ostracism may not be an option. In this case, try putting physical distance between you and the problem person. Stay out of each other's way whenever possible. In a few instances, you may have to leave the group in order to restore your sanity.

Difficult people can provoke intense anger and deep frustration from group members. Every effort needs to be made to deal with these people in appropriate manners; however we are not strictly rational beings. Even if you have lost your temper and let your emotions get away from you, this is not as problematic as simply ignoring or enduring the disruptive behavior. If your anger translates into personal attacks, at the very least you have served notice on the troublesome group member that his or her pattern of behavior is unacceptable and will not be suffered in silence.

If you do lose your self-control, you will need to follow up at a later time with direct confrontation. You may find that your initial outburst got the attention of your troublemaker. A more rational, deliberate strategy may still work even after a shouting match. There is perhaps no greater challenge or more important task in a group than to establish a positive, cooperative, confirming climate. Defensive climates promote conflict and disharmony in groups. Supportive climates do not free groups entirely from conflict, but such atmospheres enhance the likelihood of constructive solutions to conflict in groups.