

Appendix 2

Tipsheets

Tipsheets

Most of the planning and decision making in PATCH is done in group meetings. The tipsheets provide suggestions for handling various group management issues. Please review the tipsheets and share them with others, such as community group members and working group chairpersons.

Tipsheet topics:

- Brainstorming
- Facilitating meetings
- Icebreakers
- Making and using overheads
- Presenting data
- Principles of working with adults
- Problem solving
- Reaching consensus
- Recording the minutes
- Resolving conflict
- Understanding diversity
- Using the nominal group technique
- Working with volunteers

Brainstorming

Brainstorming is a problem-solving technique that encourages all members of a group to contribute ideas. Brainstorming can be used to identify causes of problems, potential solutions, and suggested activities. A successful brainstorming session supports the spontaneous flow of ideas; wild ideas are welcomed, and the more ideas, the better. Here are a few guidelines for the facilitator of a brainstorming session.

Hints

- Explain the rules (listed below) before beginning.
- Ask one or two people to record the ideas.
- Give all participants a chance to share their ideas.
- Keep a lively tempo.
- Praise the quantity rather than the quality of ideas.

Rules

- No critical remarks are allowed; evaluation comes later.
- Give the thought only; explanation comes later.
- Give only one idea at a time.
- Adding to or improving on someone else's idea is appropriate.

Methods

To manage the brainstorming session and make it most productive, choose one of the following methods.

Free-wheeling. Participants call out ideas, which are recorded as suggested. Results tend to be creative and spontaneous, and ideas tend to build on other ideas. However, some group members may dominate, while quiet members are reluctant to join in. If the group is large or dominated by a few members, the round-robin or slip methods may be more appropriate.

Round-robin. Ask each member for an idea, in turn, and have the ideas recorded in order. Members can pass on any round, and the rotation continues until all members have passed during a single round. This method, which is more organized than the first, prohibits anyone from dominating and still makes it possible for participants to build on each other's ideas. Some participants, however, may find it hard to wait until their turn and may forget ideas while waiting.

Slip. Ask members to write down ideas on a slip of paper or a note card. The slips are collected, and the ideas are recorded on a flip chart. Because contributions are anonymous, participants are free to express themselves without concern for embarrassment or disagreement. However, written comments may be unclear, and creativity may be hindered because ideas are not shared until the process is complete.

Facilitating Meetings

Most of the planning and decision making in PATCH is done in group meetings. Meetings should be facilitated to encourage participation and build a sense of vision and cohesiveness among participants. You can use many techniques to promote interaction among group members and encourage team work. Here are a few suggestions.

- Create an environment conducive to communication. Try seating participants around small tables or in semicircles; move extra chairs out of the way.
- Make participation an expectation. Ask questions frequently, and use open-ended questions to encourage thought and participation. Avoid answering your own questions or talking more than participants. Thank participants for their comments.
- Create opportunities for participants to work in teams during the community group meetings. Use some small-group or partner exercises.
- Give small assignments in advance, and ask participants to come to meetings prepared to share their work. Preview a question or problem that participants can think about between meetings, or mail out worksheets before meetings.
- Get participants to talk about themselves as a group. Ask them to consider several questions:
 - Are we working together smoothly?
 - Can we improve how we interact?
 - Can we put some more fun into our PATCH work?
- Talk with quiet participants during breaks. Help them express their ideas, and ask them to share their thoughts with the group.
- Use flip charts or overhead transparencies to record comments. At intervals throughout the meeting, summarize the main points or ask a group member to paraphrase comments or review the minutes.
- Suggest the next step if the meeting seems to be stagnating.
- Walk around to gain attention, but look directly at participants. Face participants while writing on flipcharts, or ask someone else to do the writing. Join in. Participants will want to know about you too, and they should feel that you are a part of the group.
- Expect to make some mistakes; acknowledge them, correct them, and move on.

Common problems

No matter how well planned a meeting may be, it may not go smoothly. In fact, a certain amount of discussion and dispute is necessary for healthy interaction. However, you may lose control of a meeting if certain problems occur. Here are several common problems followed by some suggestions for resolving them.

No participation. Ask for opinions, then remain silent. When participants speak up, compliment them for sharing their views.

Off the track. Interrupt the discussion, and remind participants of the original topic of discussion. Try to select a moment that would not result in anyone's being embarrassed. Suggest that the newly introduced issue be discussed at a later time, or refer the issue to a working group.

Too much talk. At the outset of the meeting, ask participants to set a time limit for individual contributions and appoint a timekeeper. Ask the timekeeper to inform participants when they go over the time limit.

Disputes among participants. Remain neutral and allow the participants to disagree. If the dispute must be resolved, encourage the group to reach a consensus. If more information would help resolve the issue, refer the dispute to a working group for further discussion.

Unyielding participants. Give the group a chance to bring them around. Often, the majority opinion will cause participants to reconsider their point of view. Suggest that the participants accept the group's view for now, and offer to discuss the issue with them further after the meeting.

Icebreakers

An icebreaker is an activity that is informal, creative, fun, and unrelated to the purpose of the meeting. It is designed to help participants get acquainted. An icebreaker provides the following advantages:

- Communicates that the meeting will be relaxed and friendly.
- Reduces any tension, anxiety, or separateness participants may feel.
- Promotes group interaction.
- Provides insight into the skills, knowledge, experience, and personality of participants.

Icebreakers can range from individual introductions to activities involving movement or imagination. Things to consider when selecting and designing icebreakers include group composition, time available, when on the agenda the icebreaker is to be used, topic for the meeting, culture of the sponsoring organization, and style and personality of the trainer(s).

Examples of icebreakers:

- To pair participants for personal introductions, shuffle a deck of prepared index cards and ask attendees to select one. Use 5"x7" index cards and make sure to print clearly. Each index card has half of a pair of words that relate to the topic/theme of the program. The paired words can be of the same meaning (e.g., health/wellness) or opposite meaning (e.g., exerciser/coach potato). Be consistent in your use. Explain the relationship of the pair words to participants before you ask them to find their “other half.” Once pairs are matched, trainees interview their partners and introduce each other to the class.
- For a good laugh and an instant discussion starter, put signs related to the subject matter on the tables. As participants come in, ask them to sit at the table with the sign that best describes them. For example, if the course deals with stress management, include table signs such as, “Burned Out” or “Help”; for time management, “Will be late for my own funeral” or “Disgustingly Punctual.”
- Members of a group learn one another’s name quickly with this exercise. Participants stand in a circle. The facilitator states his or her name and tosses a tennis ball to a participant. That person, in turn, says his name and tosses the ball to another person. This activity continues until everyone has had the ball several times. Then the rules change. As players toss the ball, they say the recipient’s names instead of their own.

Making and Using Overheads

A well-developed set of overheads can help organize your presentation, focus the attention of your audience, clarify and reinforce your ideas, and make abstract concepts concrete. Here are a few guidelines to keep in mind when making and using overheads. Most of the items are also valid for making slides.

Making overheads

- Limit each visual to one main idea. Use no more than 6 to 8 lines of text and no more than 40 characters per line.
- Show only the information you plan to discuss.
- Use key phrases rather than sentences. Avoid jargon.
- Use bullets to list key points. Numbers should be used only when the numerical order of the items is important.
- Make text bold, sans serif, and use upper and lower case because letters in all caps appear too similar from a distance.
- Use lettering 1/3" high so that text can be easily read from the back of the room. Double space between lines.
- Use one color scheme for an entire set of overheads.
- Use contrasting complementary colors and make the background dark and the letters light.

Using overheads

- Leave the projected image on the screen only as long as it supports your oral presentation.
- Turn off the projector when you do not have an image to project.
- Rehearse your presentation to become comfortable with the sequence and timing of the visuals.
- Adjust your pace to the complexity of the information and the characteristics of the audience.

Presenting Data

The PATCH process can generate a substantial amount of data. How data are presented can affect an audience's ability to process the information. Here are a few guidelines about presenting data.

- Present data in a simple, straightforward manner. The more understandable data are to community group members, the more likely members will be to use the data in planning health interventions.
- Include a frame of reference for the data. For instance, compare your community's data with national data, state data, or data from similar communities.
- Explain any limitations of the particular data set.
- Be sure any presentation of data on paper can stand alone, regardless of the particular format you choose. Label tables, charts, and graphs; specify the data source.
- Be sure that the measure you select for display (count, percentage, rate, or their measure) is appropriate for your message and the constraints of your graphic display.
- Select only one main message per visual display. If you want to focus on several aspects of the data, consider making a set of visual aids.
- Choose a graphic display most appropriate for your task. Some graphic aids are more appropriate than others for illustrating certain types of data, fostering comparisons, and allowing your audience to quickly grasp important points. Which visual display you choose depends on the message you want to convey. Here are a few basic guidelines for using the most popular charts and graphs.
 - A horizontal bar chart can be used to focus attention on how one category differs among several groups.
 - A vertical bar chart is often most appropriate when you want to focus attention on a change in a variable over time.
 - Consider using a cluster bar chart when you want to contrast one variable among multiple subgroups.
 - A line graph can be used to plot data for several periods and show a trend over time.
 - A pie chart is sometimes used to show the distribution of a set of events or a total quantity.

As you present a graphic to a group, read, and clarify it for your audience:

- Read the heading and contents of the overhead.
- Compare community data with state and national data.

- Clarify numerical units on graphics (e.g., units are expressed in numbers or rates and why).
- Discuss any adjustments made to the data (e.g., 3 years of data were grouped together because the numbers were too small).
- State any limitations of the data (e.g., may be for county, and the PATCH community may not include the entire county; numbers may be small so place the emphasis on looking at trend data; data may not be available for subpopulations because of small numbers).
- Review the differences in groups presented in the data: between men and women; among races; between age groups.

Summarize the main findings in the last two minutes of your presentation, and give participants summary handouts. Limit your presentation to less than half an hour, and ask for questions.

Principles of Working With Adults

A goal of PATCH is to increase the capacity of community members to address health issues by strengthening their community planning and health promotion skills. When choosing activities and exercises for each phase in the PATCH process and when designing interventions, keep in mind some of those characteristics of adults.

Characteristics of adult learners

- Most adult groups are heterogeneous. Individuals bring a wide range of experience to a group, but their experiences will vary in quantity and quality.
- Many adults are independent and self-directed learners who take responsibility for making decisions.
- Many adults are interested in information related to the specific problems and tasks at hand and in learning that is life centered.
- Many adults believe that the immediate application of new information is important. They are interested in learning to improve their own performance or the overall quality of life.
- Although some external factors may motivate adults to action, motivation is primarily internal. Self-esteem, a desire for personal growth and skill-building, an interest in improving the quality of life, and other similar factors may motivate the participants in your community.

Techniques for working with adults

People generally remember only 10% of what they read; 20% of what they hear; 50% of what they see and hear; and 90% of what they see, hear, and do simultaneously. Thus, experiences that involve multiple channels enhance learning and retention. Here are several techniques particularly suitable for working with adults.

Prior work. Give participants an assignment before a meeting. Advance preparation may stimulate curiosity, increase motivation to participate, and make meetings more productive.

Group discussion. Use this approach for goal setting, decision making, and problem solving. The technique requires a facilitator who can encourage interaction by asking good questions, listening well, and allowing participants adequate response time.

Mixed instructional media. Choose from among five types of instructional media: printed materials (handouts, assignment sheets, instructions), nonprojected visuals (flip charts, posters), projected visuals (overhead transparencies, slides), audiovisuals (audiotapes, films, slide-tape programs, videotapes), and computer-based materials. Choose the media most suited to group size and activity, and consider the materials and equipment each medium requires.

Simulation. Use this approach to allow participants to practice skills or rehearse activities. For example, one component of an injury-prevention strategy might be to have parents practice buckling a doll into a child safety seat. Interviewing techniques might also be practiced during a simulation activity before conducting opinion surveys. The practice session is intended to trigger interactions similar to those that are encountered in real life. Simulation can be used for individual or small-group instruction.

Problem Solving

Here is a five-step, common-sense approach to solving problems.

1. Define the problem, and then state it clearly and concisely. Be realistic about solving the problem, and consider working on parts of it rather than all of it at once. Determine how you will know whether a solution has been reached.
2. Gather information about the problem.
3. Generate ideas for solving the problem. Use one of the group techniques described in this section or another technique.
4. Choose from the alternative solutions. Set some criteria for making choices, rank the alternatives, and consider the consequences of a few alternatives before making a final decision.
5. Put the solution into effect. The solution should be explicit about responsibilities and achieving tangible results. Appoint one or more participants to oversee progress and to ensure that plans are correctly implemented.

Reaching Consensus

Groups sometimes find it hard to reach a consensus, or general agreement. Remind participants of the following guidelines to group decision making.

- Avoid the “one best way” attitude; the best way is that which reflects the best collective judgment of the group.
- Avoid “either, or” thinking; often the best solution combines several approaches.
- A majority vote is not always the best solution. When participants give and take, several viewpoints can be combined.
- Healthy conflict, which can help participants reach a consensus, should not be smoothed over or ended prematurely.
- Problems are best solved when all participants try both to communicate and to listen.

If a group has trouble reaching a consensus, consider using some special techniques. See the tipsheets on brainstorming, the nominal group technique, and resolving conflict.

Recording the Minutes

If you are asked to record the minutes of a meeting, review the guidelines below.

- Listen for key words and phrases; do not try to take down every word that is said.
- Be sure to record the following:
 - Date and time of the meeting.
 - Names of attendees.
 - Topics discussed and the process used (e.g., brainstorming, nominal group technique, discussion).
 - Actions taken or decisions made.
 - Tasks to be done between meetings and persons or working groups responsible for them.
 - Items to be carried over to the next meeting or referred to a working group.
 - Date and time of the next meeting.
 - Number and date on each page of the minutes.
- If you are writing on a flipchart, print clearly in large letters so that the text can be read by everyone in the room.
- Use different colors or formats to distinguish process from content.
- Use symbols, numbers, or other graphic devices to lend order and emphasis to the text.

Resolving Conflict

Conflict resolution is the process of settling disagreements among group members. Here are four ways to resolve conflicts about goals, plans, activities, or procedures.

Avoidance. One way to handle conflict is to ignore it. You might choose this method if the conflict does not seem important enough to discuss. Avoidance might also be the best temporary solution. However, avoiding a problem does not solve it. Emotional tension, misunderstanding, and intolerance can result from unresolved conflict, so reassess the problem later.

Accommodation. Ask participants to yield or conform to the positions of others—even at the expense of their own ideas or values. Asking a participant to accommodate another person’s position requires great tact and discretion.

Compromise. A compromise is a solution accepted by all members of the group. Everyone wins something, but everyone has to give up something as well. When a consensus cannot be reached, compromise may be the only solution.

Collaboration. Collaboration requires all group members to acknowledge the conflict, consider many possible solutions and the consequences of each, and select the alternatives that best meet the needs of the group. When persons in a group collaborate, they draw on shared values, needs, interests, and resources; therefore, this approach is generally accepted as the best. Because the process takes time, however, it is best reserved for issues of greatest importance.

Understanding Diversity

Members of a group come from many different backgrounds. Some members may be much older or much younger than other members; some may represent different cultural, racial, or ethnic groups; and some may represent different educational levels and abilities. Extra awareness and flexibility are required for the facilitator and other group members to remain sensitive to different backgrounds. Below we suggest a few ways to improve your awareness of differences. In general, new information is acquired so that different perspectives can be understood and appreciated.

- Become aware of differences in the group by asking questions and getting involved in small-group discussions.
- Seek involvement and input and listen to persons of different backgrounds without bias, and avoid being defensive.
- Learn the beliefs and feelings of specific groups about particular issues.
- Read about current and emerging issues that concern different groups, and read literature that is popular among different groups.
- Learn about the language, humor, gestures, norms, expectations, and values of different groups.
- Attend events that appeal to members of specific groups.
- Become attuned to cultural cliches, stereotypes, and distortions you may encounter in the media.
- Use examples to which persons of different cultures and backgrounds can relate.
- Learn the facts before you make statements or form opinions about different groups.

Using the Nominal Group Technique

The nominal group technique is useful for determining which items are of highest priority to a group. The items may result from brainstorming or may be responses to questions or selections from a list of options. Because participants work independently, no one can dominate the process. To direct the process, follow these four steps.

1. Pass out index cards to all members of the group.
2. Ask member of the group to list on their cards the three to five items of highest priority, with the first item being the most important.
3. Collect the index cards and ensure that rankings are anonymous.
4. Read the cards out loud, and record the rankings on a flip chart as follows. When only three items are ranked, a number 1 ranking is worth 3 points, number 2 is worth 2 points, and number 3 is worth 1 point. (In a ranking of the top five, the number 1 ranking receives 5 points.) For the ranking of each item on each card, make a hatch mark under the column for the appropriate number of points.

For Example

Item	<u>3 points</u>	<u>2 points</u>	<u>1 point</u>	<u>Total</u>
A	///	/	////////	18
D	/	////	//	13
G		/	//////////	11
J	////	////////	/	30
M				0
P	/	//////	//////	21
S	////////	/	/	27
V			/	1
Y	/	///	/	10

In the example, the top priority items are J, S, P, and A. Because P and A are close in score and significantly greater than the next highest score, they are included among the highest ranking items, making a top priority grouping of four items, rather than three or five.

When participants feel free to express opinions and discuss issues, you can use a less-formal approach. Ask for a show of hands for ranking each item. If priority items are identified but not ranked, record one point for each item, and the total points indicate which items are of highest priority to the group.

Working With Volunteers

Volunteers work for self-satisfaction, personal growth, fun, and other intangible rewards. Each volunteer should be treated as a colleague and recognized as an official part of the team. However, offer volunteers more flexibility than you can to employees, and adjust your expectations accordingly. For example, because volunteers cannot contribute as much time as paid, full-time workers do, they cannot complete tasks as quickly. When scheduling activities, be realistic about how long a busy PATCH participant will need to complete it.

Get to know each volunteer personally so that you can learn about special abilities and limitations and match responsibilities to skills. Vary responsibilities as desired by the volunteers.

Be sure to assign specific and clearly defined tasks and to explain procedures and expectations. Develop a work plan or job description for the volunteer to help ensure that roles and responsibilities are understood. Provide training and give credit for work done. Give lots of feedback, encouragement, and signs of appreciation. Be willing to change the placement of volunteers, if that seems appropriate, or even dismiss a volunteer if necessary.

Keep in mind the following key points of working with volunteers. They want to be

- appreciated for the work they do.
- busy with worthwhile and varied tasks.
- provided with clear communication about tasks and expectations.
- developed through training.