

# PATCH Meeting Guide

Overview

# PATCH Meeting Guide: Overview

## Using the PATCH meeting guide

This Meeting Guide is part of a three-part package of materials designed for the local coordinator, the person who facilitates the Planned Approach to Community Health (PATCH) process in the community. This Meeting Guide is designed to assist you with planning and conducting the various meetings used to carry out the PATCH process. It is intended to be used in conjunction with the other two parts: the PATCH Concept Guide, which includes information and tools for carrying out the PATCH process, and the Visual Aids packet, which includes camera-ready copy of overheads and handouts.

This Meeting Guide includes guides for five meetings, one for each phase of PATCH. For each meeting, there is an agenda, an estimate of the time required to conduct the meeting, and suggested text or activities you can use to facilitate each segment of the agenda. All suggested wording, in italic type, is set off from instructions and recommendations. As you proceed through the PATCH process, you will need to determine the level of skills and understanding of your community group and expand, shorten, or omit segments of the agenda as appropriate. Consideration also should be given to the level of detail that is appropriate for the community group and for the working groups. In phases IV and V, for example, many of the segment of the agenda might be provided as an overview for the community group and provided as detail training for the working group. You will want to refer to the corresponding chapter of the Concept Guide for valuable discussion points and examples that are not repeated in the Meeting Guide.

The guides are not intended to be comprehensive but are suggestions based on experience in many PATCH communities. The text provided may reduce the amount of time you need to prepare for meetings and may help set the tone for the additional text or activities you develop to meet your needs and those of your community. Please feel free to adapt the materials to meet your needs and circumstances. Furthermore, you may prefer to hold two or three shorter meetings for each phase; the guides include suggestions for shortening or varying each agenda.

Throughout the guides, optional content is noted and suggestions are provided on how to prepare for different segments of the meetings. These activities, which are introduced by the label “Preparation:” and terminated by the symbol ■, include background information, options to be considered, decisions to be made, and materials to be prepared before the meeting. Although it is assumed you have a working knowledge of the entire PATCH Concept Guide, the Preparation sections identify specific sections of the Concept Guide and other materials to review before each meeting.

As local coordinator, you have responsibility for ensuring that tasks are completed, meetings are conducted cooperatively and productively, and the program is community owned. You should review the working group products before the meeting and debrief after the meeting with such groups as the steering committee, partners, and working group chairpersons. Many communities have found that they actually hold three meetings concerning each phase of PATCH: a community group meeting and a meeting before and after the community group meeting that may include steering committee members, partners, and working group chairpersons. Because much of the work in PATCH is done by working groups and others outside of the community group meetings, a list of “Topics for Discussion” after each community group meeting is provided at the end of the meeting guide for each phase.

## Meeting reminders

Here are a few reminders that pertain to all meetings you will moderate during the PATCH process. Additional information about group process and meeting management is included in the Tipsheets in Appendix 2 of the Concept Guide.

- Work with the steering committee or working group to determine operational procedures, including making decisions, communicating within and between groups, and carrying out administrative tasks.
- Schedule meetings at times and locations most convenient to the participants.
- Prepare an agenda so that sessions are focused. Divide the suggested agenda among multiple meetings if doing so would better suit participants.
- At the beginning of each meeting, review accomplishments and outline what remains to be done.

- Keep meetings short and on schedule. If an issue requires more time than is scheduled, use time planned for another issue, defer discussion until another meeting, or refer the issue to a working group for resolution.
- Encourage participants to ask questions and make comments throughout the meeting. Involve participants in brainstorming, decision making, problem solving, and other activities. Avoid lecturing.
- Arrange meeting rooms to enhance participation; for example, place chairs in a semicircle or in clusters.
- Make sure that you have enough sets of handouts for all participants. Give participants a folder or looseleaf binder for storing materials such as reports, handouts, and notes.
- Incorporate an informal activity or a social component, such as sharing a meal, refreshments, or a holiday party, when possible. Some unscheduled time will add fun to the event and allow participants to get to know each other personally.
- Provide enriching and skill-building experiences, such as speakers, training seminars, and workshops.
- Ensure that meeting minutes are prepared and distributed to community group members, partners, and others in the community. Use multiple channels to keep the community informed and to encourage participation.

## **Evaluating the community group meetings**

PATCH is designed to be carried out through a series of community group meetings in which issues are discussed, tasks are assigned, and decisions are made. Your role is to facilitate the meetings and to encourage participation and ownership by the group. You will want to carefully observe the communications and actions within the group and to ask the group for feedback on how things are going and how things might be improved.

At each community group meeting, it is desirable to obtain structured feedback on one or more of the following:

- content of sessions
- group process used
- skill levels and training needs.

The decision to evaluate one or more of these areas should be tailored to the purpose and the expected outcome of the meeting. In the Concept Guide, review the Meeting Format section of Chapter 2 (page CG2-16) and the Monitoring the Phases of PATCH section of Chapter 6 (page CG6-3). Review the Tipsheets of Appendix 2 for hints on managing group process. The information and tools presented may also be used with working groups.

### Evaluating the content of the sessions

There may be times when you would like to evaluate the quality of an informational or training session. Doing so is especially important if the session will be repeated in the community because the results of the evaluation may indicate revisions that might be needed. One way to approach the evaluation of content would be to ask participants to rate and comment on individual sessions.

A partial example:

### Community Group Meeting for Phase I

#### Opinionnaire

Please specify how helpful you found the information provided during each session by circling a number for each session and writing your comments below each entry.

Session	Not Helpful					Very Helpful				
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1. Overview of PATCH	1	2	3	4	5
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Comments:

2. Importance of gathering	1	2	3	4	5
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information

Comments:

If you would like feedback on the effectiveness of visual aids or exercises that were used, you might want to include items evaluating them.

A partial example:

**Workshop Evaluation**

Please rate the extent to which you agree with the statements concerning each topic of the workshop.

Interventions: Policy and Environmental Actions

	Strongly Disagree	Neither Agree nor Disagree	3	4	Strongly Agree
The topic covered will be useful in my understanding of PATCH.	1	2	3	4	5
The presentation was well organized.	1	2	3	4	5
The overheads added nicely to the presentation.	1	2	3	4	5
The exercise in this session was meaningful to me.	1	2	3	4	5
The speaker allowed adequate time for questions and discussion.	1	2	3	4	5

Comments:

### Evaluating the group process used

The functioning of the community group is vital to the success of the program. Because community-based programs go through several phases of organizing, planning and setting priorities, keeping track of how each phase is working and how groups are functioning is important. In the Monitoring the Phases of PATCH section of Chapter 6 of the Concept Guide (page CG6-3) are examples of questions you might ask to track and evaluate each phase of the PATCH process. You might also wish to ask members of the community group and working groups to complete a self-assessment form for how the group is progressing.

For example:

#### Self-Assessment by the Group

Please provide input to the process and the policies that govern meetings. Please indicate your agreement or disagreement with the statements below by circling the number on the scale that best represents your experience in group meetings. Please give written comments as appropriate.

	Strongly Disagree	Neither Agree nor Disagree	Strongly Agree		
1. The atmosphere is friendly, cooperative, and pleasant.	1	2	3	4	5
2. The purpose of each task or agenda item is defined.	1	2	3	4	5
3. Everyone, not just a few, participates in discussions.	1	2	3	4	5
4. There is no fighting for hidden agendas.	1	2	3	4	5
5. Members stay on task.	1	2	3	4	5

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|--|---|---|---|---|---|
| 6. The group adjusts to changing needs and situations.           | 1 | 2 | 3 | 4 | 5 |
| 7. Members feel safe in speaking out.                            | 1 | 2 | 3 | 4 | 5 |
| 8. Tasks are usually done on time.                               | 1 | 2 | 3 | 4 | 5 |
| 9. Materials are prepared adequately and in advance of meetings. | 1 | 2 | 3 | 4 | 5 |
| 10. Members attend regularly.                                    | 1 | 2 | 3 | 4 | 5 |
| 11. I am usually clear about my role as a group member.          | 1 | 2 | 3 | 4 | 5 |
| 12. My assignments are manageable and not overburdening.         | 1 | 2 | 3 | 4 | 5 |
| 13. Meeting times work well with my schedule.                    | 1 | 2 | 3 | 4 | 5 |

14. Do you feel that your expertise or talents are being used well?

Yes  No

If no, how could they be used more effectively?

15. What changes would make the group more effective?

16. What changes would make serving on the group more enjoyable?

17. Other comments/suggestions:



### Evaluating skill levels and training needs

Strengthening skills is an ongoing process in which the skills needed to do tasks are identified, the level of skills in the community are determined, and training or other skill-building activities are provided to increase those skills. Some communities systematically address skill-building by looking at the work plans for accomplishing tasks during a period of time (e.g., during the next month, the next three months, or the next phase) and developing a skill-building plan for the same period. This form of evaluation allows you to identify and provide for the skill-building needs of the group.

A partial example:

#### Work Plan

Activity: To pass a clean indoor air ordinance.

<b>Task</b>	<b>Completion Date</b>	<b>Who</b>	<b>Skills/Training Needed</b>
Review procedures for passage	5/1	Jane	Attend training for legislative aids