



## **Phase Two Training**

### **Alliance of Consumer Panel and Health Service Executive**

#### **Team Building Sessions I & II**

#### **Introduction and Rationale**

The Consumer Panel Capacity Building training programme carried out in Sessions 1-10 will not come to a successful conclusion unless local health services support and engage in the process at the outset. The objective of establishing meaningful service user, carer and family involvement in shaping local health services will never come to fruition unless services have 'bought into' the concept. This is also important given that the second stage of this training initiative consists of 1 or 2 collaborative team building sessions between local health service representatives and the newly formed Consumer Panel.

The principal aim of these session(s) are to find agreement on values, principles and actions to be taken in order to begin to establish a sustainable working relationship between service users, carers, family members and service providers at local level. The primary objective of the collaborative team building session(s) is to support all involved in finding common ground going forward. They also operate as a stimulus to achieve the following commitments:

1. Local HSE to work with the Consumer Panel to develop a strategy plan, including investment to sustain user, family member/carer involvement (this would presumably include resources e.g. where the Consumer Panel can meet, reimbursement for travel and subsistence, and could include a liaison person who could become the conduit for the Consumer Panel, offering support or/and advise if required).
2. Both groups to develop Terms of Reference to guide working relationships between all involved. The significance of the Terms of Reference cannot be overemphasised. There is a need for the Consumer Panel to maintain a level of independence in order that it be representative of its constituency group. This will have consequences for the type of

relationship the HSE and Consumer Panel establishes and therefore needs to be reflected in the Terms of Reference.

Further to the above, it may be felt that only one Team Building Session is required to reach a consensus statement and decide actions to be taken in order to establish the Alliance and agree Terms of Reference (1 and 2 above). Above all, it is important to get the structures as good as they can be before agreeing the practicalities of working together.



## **CONSUMER PANEL TRAINING PROGRAMME**

### **Alliance of Consumer Panel and Health Service Executive**

#### **TEAM-BUILDING SESSION I**

##### **Lesson Plan**

**Attendance:** - Session to be attended by Participants who completed the 10-Session Consumer Panel Capacity Building Training Programme together with Representatives from local Health Services (HSE).

**The Aim of this Team Building Session** is to find agreement on values, principles and actions to be taken in order to begin to establish a sustainable working Alliance between Service Users, Carers, Family Members and Service Providers at local level (HSE). The following appears in the attached powerpoint, but provides a little more detail and instruction.

**The Objectives of this Team Building Session are:**

- 1) To introduce attendees to one another;
- 2) To ensure everyone is aware of the key subjects covered in the 10 session capacity building training programme;
- 3) To revisit the initial 'agreement' with local health services in supporting and engaging with the Consumer panel.
- 4) To Explore:  
Individual and group identities;  
Individual and group values;
- 5) To 'Sketch out' a consensus statement;
- 6) To reflect on today's session.

**Learning Outcomes:** - on completion of this Team Building Session, Participants should be able to:

- 1) Summarise what was covered in the 10-week capacity-building training programme;
- 2) Identify how they can contribute to an Alliance as individuals;

- 3) Identify how they can contribute to an Alliance as a Group (of service users, of family members/carers or of service providers);
- 4) Demonstrate an awareness and understanding of the elements necessary for an Alliance working culture between service users, family members/carers, and service providers;
- 5) Demonstrate an understanding of the importance of listening to and learning from each other;
- 6) Compose an initial Consensus Statement for the Alliance;
- 7) Observe and acknowledge differences within the Alliance;
- 8) List the next steps for the Alliance.

Equipment needed: laptop, projector, screen, flipcharts x 3

Materials needed: lots of flipchart paper, pens, A4 writing pads, participant manuals; Hand-outs; lots of glossy magazines; scissors (x 10); pritt-stick glue (x10); markers. A soft medium sized ball. 'Junk' box containing about 30 items (for example a scissors, a screw driver, an elastic band, a stress ball, a stapler and various other items.

Duration: 4.5 hours

## **Agenda Item #1:- Meet and Greet**

**Method:** Refreshments/mingling

**Duration:** 15 minutes

## **Agenda Item #2:- Introduction to the day/setting the scene**

**Key purpose/message:** - to inform all Participants what will be covered during the session.

**Method:** Powerpoint Presentation: slides 1-8

**Duration:** 15 minutes

## **Agenda Item #3:- Warm Up Exercise**

**Key purpose/message:** - introduce participants to each other; allows time to build an initial rapport with the rest of the group.

**Method:** Ice-breaker – ask participants to choose an item from the 'junk' box – an item that says a little bit about him/her. Then ask each participant, in turn, to introduce himself/herself to the group and what the item says about them. For example, a participant may choose an elastic band. They may explain to the group that they chose this item because they feel stretched and pulled in all sorts of directions due to a number of demands on their time.

Alternatively, Attendees could be asked, ahead of the session, to bring an item that reflects their identities.

**Duration:** 15 minutes

## **Agenda Item #4:- Exploring Individual and Group Identities**

Key purpose/message: - Gives participants an opportunity to think about how they can contribute to an Alliance (Consumer Panel with HSE)

Method: Power point presentation – slides 9&10

Collage - split the group into 2 or 3 sub-groups (depending on numbers); 1- 2 groups consisting of service users/carers and 1 group of service providers.

Cut out pictures or statements from the magazines that represent personal opinions on:

- 1) Your identity/role as (i) a professional service provider or (ii) a service user or (iii) a family member/carer;
- 2) The challenges arising from having this identity/role (eg; service providers may constantly feel under pressure due to work load)
- 3) What you believe others perceive of your identity/role? (eg; a family member/carer may struggle with the feeling of being judged – as being part of the cause of their loved one's mental health problem)
- 4) Satisfactions associated with this role (eg; a service user may feel that their experiences have enriched their life or/and relish the opportunity to demonstrate that they are competent, resilient and capable)

Each group to create a collage combining the personally chosen pictures/statements in order to generate a group identity. Each group to nominate a person to present and talk about their collage to whole group and facilitators.

Duration: 60 minutes

## **Agenda Item #5:- Lunch**

Method: Sit-down lunch – mix the groups;

Duration: 60 minutes

## **Agenda Item #6 – Cultural Values I (separate groups; 1-2 made up of service users; carers/family members; 1 group made up of service providers)**

**Key Purpose/Message:** - gives both groups i.e. service users/family members/carer group and (ii) the service provider group - an opportunity to reflect, discuss and agree top ten values in relation to their role in the Alliance.

**Method:** Powerpoint presentation (slides 11-14) and Values/Beliefs/Behaviours exercise (See Appendix A to this Lesson Plan);  
(follow the powerpoint explanation/descriptions of each concept and directions to complete the task).  
Hand out Values, Beliefs, Behaviours sheet (Appendix A to this Lesson Plan), one for each group.  
Return to the groups that worked under Agenda Item #4 - note 10 values that represent how your (current) culture operates.

**Duration:** 20 minutes

## **Agenda Item #7 – Cultural Values II (mixed groups made up of service users, carers/family members and service providers)**

**Key Purpose/Message:** - enables mixed groups to discuss and agree top 5 values out of the lists agreed in Agenda Item #6 above.

**Method:** Powerpoint presentation (slide 15) and Values/beliefs/behaviours exercise;  
Mix the groups – must have 3 groups comprising service providers, service users and family members/carers; note 10 values that represent the elements necessary for culture of the Alliance to achieve its highest performance (desired culture).

**Duration:** 20 minutes

## **Agenda Item #8 - Juice Break**

**Duration:** 10 minutes

## **Agenda Item #9 - Energiser**

**Key message/purpose:** engage the members cognitively; increase energy levels.

**Method:** Catch

**Duration:** 15 minutes

**Objectives:** This energiser is useful helping participants appreciate the value of working as a team and how it can feel to be isolated.

**Materials –** A soft ball

**Instructions –** Without introduction of any kind, begin to play catch with only one member of the group. Don't make any comment, just begin to pass a ball backwards and forwards between you and the chosen participant.

After a minute or two, slowly bring in other people into the game of catch. Do this until everyone is included and you are no longer the focus of the game. If you do seem to get the ball more than others, begin to pull away from the game, make it clear that everyone else should be involved.

Once this has gone on for some time, bring the game to a close and lead a discussion about what took place.

**In review**

1. How did the group feel when they weren't involved?
2. How did the initial participant feel when only they were included?
3. Was there more integration and happiness and smiles when everyone was included? If so, why?
4. What does this tell us about teamwork and what did we learn?
5. How can we improve group work in our Alliance?
6. What lesson can you take forward to the Alliance?



## **Agenda Item #10 – Consensus Seeking (all)**

Key message/purpose: narrows down the focus of this Team Building session

Method: powerpoint presentation (slide 16) and group work;  
entire group to develop a Mission Statement based on roles, values and principles discussed up to now.

Duration: 20 minutes

## **Agenda Item #11 – Reflection**

Key Purpose/Message: - Allows time to reflect on what was achieved in this Team Building session.

Method: powerpoint presentation (slides 17-20) – moving forward, continuous monitoring, final thoughts and working together;

Duration: 10 Minutes

## **Agenda Item #12 - Conclusion**

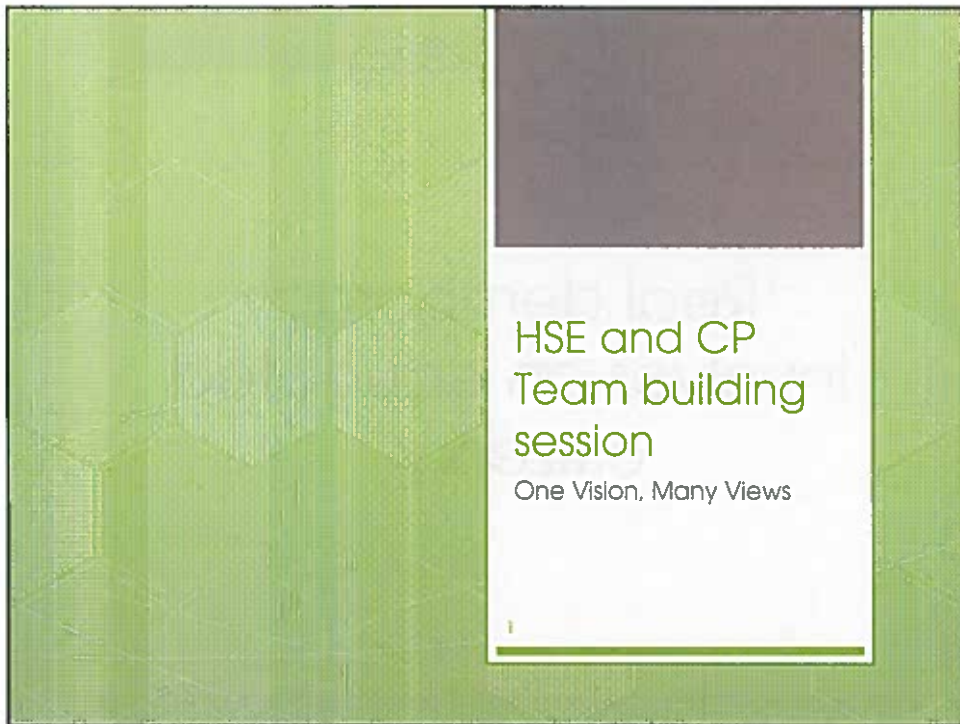
Key Purpose/Message: Brings closure to the session

Ask for feedback from participants as to how the session went.

Describe the follow on session which will conclude with instructions as to how the Alliance will agree the way forward and develop Terms of Reference.

Duration: 10 minutes



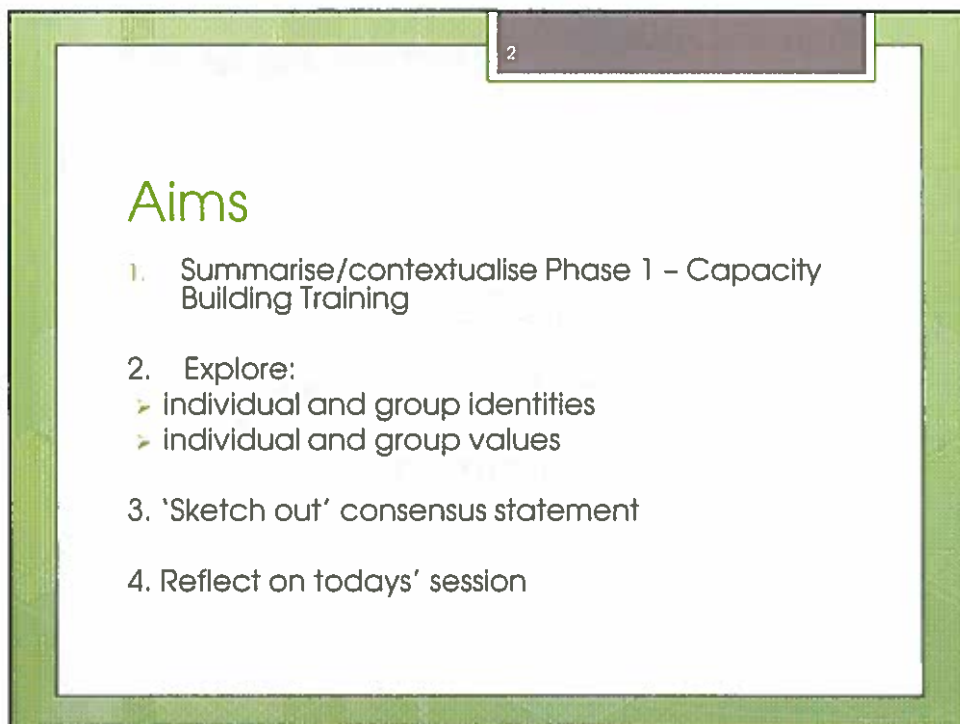


The slide features a green background with a faint hexagonal pattern. A dark grey rectangular box is positioned in the top right corner. Below this box, the text is displayed in a green font.

## HSE and CP Team building session

One Vision, Many Views

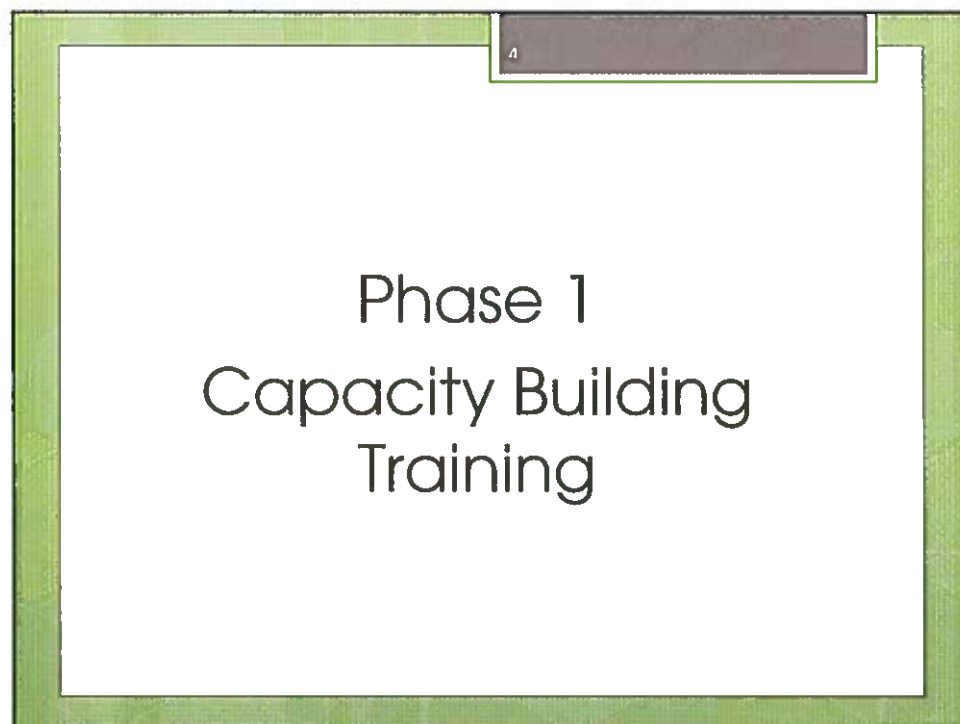
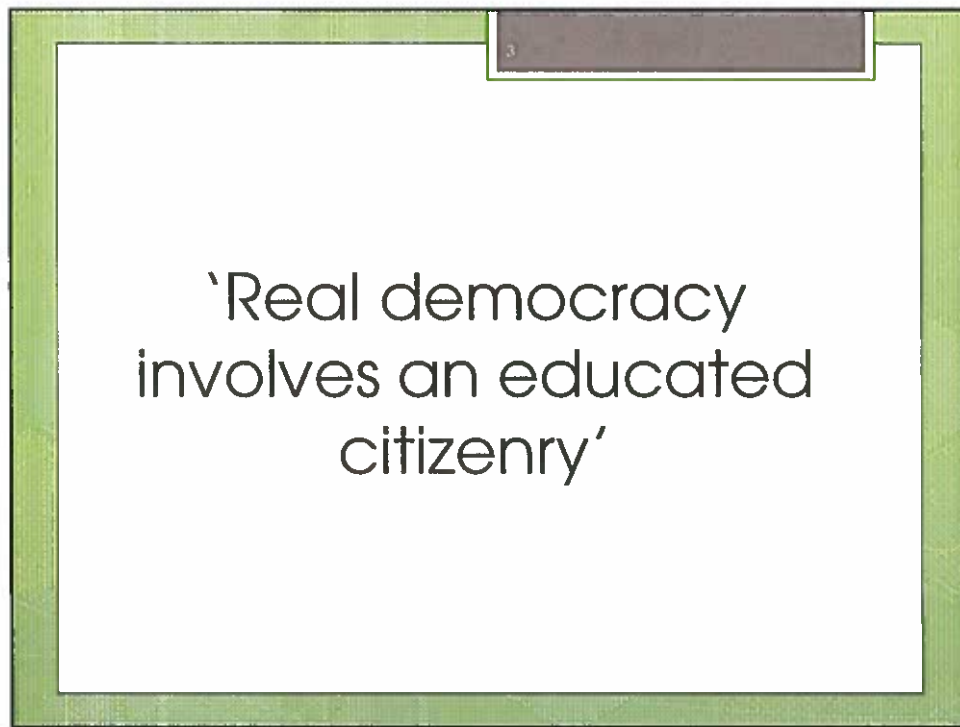
1



The slide has a green border and a white background. A dark grey rectangular box is located in the top right corner, containing the number '2'. The word 'Aims' is written in a large green font. Below it, a numbered list of four items is presented.

## Aims

1. Summarise/contextualise Phase 1 – Capacity Building Training
2. Explore:
  - individual and group identities
  - individual and group values
3. 'Sketch out' consensus statement
4. Reflect on today's session



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- o 1. Service User involvement, history, context and current status
- o 2. Self advocacy – feeling confident to speak up; competencies and skills for effective communication
- o 3. Role of the Consumer Panel
- o 4. Policy context – Vision for Change and other relevant documents
- o 5. HSE structures - functions, responsibilities and commitments & challenges

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- o 6. Formalities of meetings - agenda, apologies, minutes, matters arising etc.
- o 7. Critiquing and analysing documents; review or contribute to the development of HSE documents/policies
- o 8. Sourcing and using relevant information, knowledge and practices
- o 9. Building resilience, personal and professional alliances - personal and formal networking
- o 10. Team building - specifically for the service user/family member/carer Group

A presentation slide with a green border and a dark grey header box containing the number 7. The slide text describes the 'Team Building stage' as agreeing on values, principles, and actions to establish a sustainable working relationship between SUs, Carers, and SPs at a local level.

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## Team Building stage ...

To agree on values, principles and actions to be taken in order to begin to establish a sustainable working relationship between SUs, Carers and SPs at local level

A presentation slide with a green border and a dark grey header box containing the number 8. The slide features a quote: 'I must follow my people, I am their leader.'

8

'I must follow my people, I am their leader.'

9

## Exploring individual and group identities

1. Cut out pictures or statements from the magazines and papers that represent personal experiences/opinions on:

- Your identity and/or role as: 1. professional/provider of services 2. service user or 3. carer
- Challenges arising from having this identity/role?
- Satisfactions associated with this identity/role?
- What you believe others perceive of your identity/role?

2. Create a group collage combining the personally chosen pictures/statements in order to generate a group identity

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## Identity challenges

Stereotyping (i.e. putting people into groups and categories) is based on a normal cognitive process: the tendency to group things together. In doing so we tend to exaggerate:

1. the differences between groups
2. the similarities of things in the same group.

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## Values

Values relate to a 'Moral compass' whereby beliefs are attached to a sense of right and wrong/what is fair and desirable.

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## Exploring Values

- Values are beliefs (*often reflected in behaviours*) ... tied inextricably to emotion, not objective, cold ideas.
- People's values form an ordered system of value priorities that characterise them as individuals. This hierarchical feature of values also distinguishes them from norms and attitudes.
- Values influence the level of concern we have and motivation to change things - an indication of striving for better (self actualisation)

(Schwartz, 2006).



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## Defining culture ...

- "the way of life, especially the general customs and beliefs, of a particular group of people at a particular time."  
*Cambridge English Dictionary*
- This involves a series of activities, behaviours and worldviews

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## Cultural Values 1 (groups)

Use the sheet on 'Values, Beliefs & Behaviours' to note ten values that represent the basis from which your culture operates (current culture)

15

## Cultural values 2 (all)

Discuss and agree the top five values from the 'Values, Beliefs & Behaviours' sheets that represent the elements necessary for a working culture between SUs, Carers, SPs to achieve their highest performance (desired culture).

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## Seeking consensus

Develop a mission statement based on roles, values and principles discussed up to now

Whilst doing this concentrate on:

- Agreeing expectations
- Acknowledging limitations (realistic) in order to focus positively
- Group reflection, group learning

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## Moving forward ...

- The importance of listening and learning
- Appreciate the time and space
- Establishing deeper understanding and empathy for each other
- Descriptions of Problems into goals
- Best to form small steps than seeking immediate or major change which may only lead to frustration
- Explore options for progress
- Transparency

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## Continuous monitoring

- Explore and acknowledge differences and note any changes experienced
- How best to embed Participatory Action?
- Consider values that need strengthened, activated values that need to change
- How do we ensure transparency? -  
Through an agreed strategy?

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## Final thoughts ...

'Even the gloomiest of assessments of human nature lead to the conclusion that we should be working to mitigate unhelpful aspects of our biology through cultural interventions'

'... how bizarre it would be to conceive of an I without an us ...'

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## Working together

- Empathy, cooperativeness, sharing, altruism ...
- Always be aware of working relationships and what we leave for future generations
- We need each other as a defined human enterprise

# TEAM BUILDING SESSION 1 - APPENDIX A

Values

Beliefs

Behaviours

Please note ten values that your group believes important in relation to its perceived role/function	What are the group's beliefs that support this value?	What behaviours do the group exhibit to support this value?
1.		
2.		
3.		
4.		
5.		
6.	O	
7.	O	O



8.		
9.		
10.		

**Examples of values that might get you started**

<p><b>Accountability</b></p> <p>Achievement</p> <p>Compassion</p> <p>Cooperation</p> <p>Creativity</p> <p>Efficiency</p>	<p><b>Excellence</b></p> <p>Fairness</p> <p>Friendship</p> <p>Honesty</p> <p>Independence</p> <p>Initiative</p>	<p><b>Making a difference</b></p> <p>Open communication</p> <p>Personal growth</p> <p>Responsibility</p> <p>Self-discipline</p> <p>Trust</p>
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## **Alliance of the Consumer Panel and Health Service Executive**

### **TEAM-BUILDING SESSION 2**

#### **Lesson Plan**

**Attendance:** - Session to be attended by Participants who took part in the Alliance Team-Building Session 1.

**The Aim of this Team Building Session is to advance the vision and objectives of the Alliance and find agreement in order to make provisions for the official formation of the Alliance.**

**The Objectives of this Team Building Session are:**

- 1) To summarise what was covered in Alliance Team Building Session 1.
- 2) To review the 'theory of practice' of the Mental Health Alliance.
- 3) To establish the distinctive purpose of the Mental Health Alliance.
- 4) To guide the Alliance towards the development of terms of reference for the Mental Health Alliance.
- 5) To agree the steps necessary for the Mental Health Alliance to move forward.

**Learning Outcomes:** - on completion of this Team Building Session, Participants should be able to:

- 1) Recall what was covered in Alliance Team Building Session 1;
- 2) Gain an awareness of each Participant's expectations of Team Building Session 2;
- 3) Identify what an Alliance means and identify the strengths, weaknesses and challenges of an Alliance;

- 4) Identify issues of dispute within an Alliance and how to find consensus on these issues.
- 5) Demonstrate an awareness of the 'theory of practice' of an Alliance between the Consumer Panel and the Health Service Executive;
- 6) List the elements that need to be considered in determining Terms of Reference for the Alliance;
- 7) Establish commitment for actions to be taken for the Alliance to move forward.

Equipment needed: laptop, projector, screen, flipchart x3.

Materials needed: flipchart paper, markers, pens, A4 writing pads, participant manuals; presentation hand-outs.

Duration: 4.5 hours

## **Agenda Item #1:- Meet and Greet**

Method: Refreshments

Duration: 15 minutes

## **Agenda Item #2:- Introduction to the day/setting the scene**

Key purpose/message: - to inform all Participants what will be covered during today's session.

Method: Powerpoint Presentation. (Slides 1-2)

Summarise Alliance Team Building Session 1 and put up the Consensus Statement agreed at the end of that session.

Duration: 15 minutes

When the consensus statement is presented on Slide 2, Facilitator to steer participants away from significantly altering what was agreed in Team Building Session 1. It can be put to the group that the Consensus statement is 'a beginning' and can be further refined, in particular when writing up the terms of reference which requires commitment by the end of the session.

## **Agenda Item #3:- Expectations**

Key purpose/message: - Finding agreement as to how to make the best out of the available time.

Method: Flip chart write up.

Note on the flip chart, discussion on expectations participants have of one another during this team workshop e.g. respect, realistic, listening, confidentiality, etc.

Duration: 15 minutes

## **Agenda Item #4:- Proceedings**

**Method:** Group work; flip chart write-up and presentations

**Duration:** 50 minutes

Following introductions and expectations, participants are broken up in to three groups mixing service users, carers/family members and service providers.

On 3 separate pre-prepared flip chart sheets given out they are asked to share ideas about:

1. What the word 'Alliance' signifies e.g. collaboration;
2. The Strengths of an Alliance;
3. The Challenges for an Alliance.

Each group to present their answers to the larger group and discuss as necessary.

Flip charts to be written up and disseminated after the session by facilitators.

## **Agenda Item #5:- Lunch**

**Method:** Sit-down lunch – mix the groups;

**Duration:** 60 minutes

## **Agenda Item #6 – Theory of Practice**

**Method:** Power point – slides 3-4

Flip-chart write up. Three groups made up of a mixture of service users, carers/family members and service providers;

**Duration:** 70 minutes

A variant of Argyris and Schön's concept of a 'theory of practice' to be presented on the powerpoint and a brief explanation provided.

Then each group to note on flip chart paper:

1. Why the Alliance needs to exist (prompting situation);
2. What change could occur due to the existence of the Alliance (desired consequences);
3. What actions need to be taken to ensure the Alliance moves forward/becomes established.

As with Argyris and Schön's concept of a 'theory of practice', assumptions from any of the above questions need to be acknowledged and discussed. This may require 'conversions' of

personal expectations or ideas and detection of intent or actual affect e.g. those that might create division or dominance. It is necessary for facilitators to demonstrate impartiality and empathy throughout the session as assumptions may be formed unconsciously with limited awareness of impact. The facilitators do not raise issues of dispute but enable the group to identify these. In realising the effects of potential division, dominance, intent etc., the group can be guided to find a consensus as to how to move forward together.

An alternative to Argyris and Schön's 'theory of practice' concept might be to look at PDSA cycles (Plan, Do, Study, Act). Participants could be placed in mixed groups and either do one of three things:

1. Ask the service users/family members/carers in the group to think of something that needs to be changed. Together they devise a plan, what outcomes do they want, identify how it will be done, how will it be monitored and reported;
2. Give a vignette to each group about a service problem;
3. In one of the groups, ask the professionals to come to the group with a problem they have delivering a service.

Key purpose/message: - to get participants to feel how they would work together. Allows the group to leave positively and optimistically wanting to get together to work out the Terms of Reference.

## **Agenda Item #7:- short juice break**

Duration: 10 minutes

## **Agenda Item #8 – Closing**

Participants asked to 'take a stand' on a continuum between the two extremes of 'fully convincing theory of practice' and 'totally unconvincing theory of practice'.

That is to say, how convinced at the end of this session they feel progress has been made, that more can be realised moving forward, and that the emerging theory of practice could be refined further as a prelude to determining appropriate terms of reference for the Alliance.

Duration: 20 minutes

Handout to be given out with the following elements for consideration when determining terms of reference.

- Name, establishment date and term...

- Accountable to...
- Purview and specific objectives...
- Membership criteria... (inclusion/exclusion criteria; number; quorum; rotation)
- Meeting schedule...
- Meeting style and format...
- Meeting management... (agenda, briefing papers, chairing, minutes)
- Entitlements and responsibilities of members...
- Specific roles, functions or offices...
- Dispute resolution mechanisms...
- Review and TOR amendment mechanisms...
- External collaboration and supports...

## **Agenda Item #9 - Conclusion/Ending**

**Key Purpose/Message:** Brings conclusion to the session.

Ask for feedback from participants as to how hopeful they are at the end of the session. Ask for 'key' contacts in order to disseminate write ups from the session. Seek consensus going forward and commitment from a number of key people (a Working Group perhaps) to begin drafting a Terms of Reference to disseminate for discussion and ultimately find agreement among Alliance members.

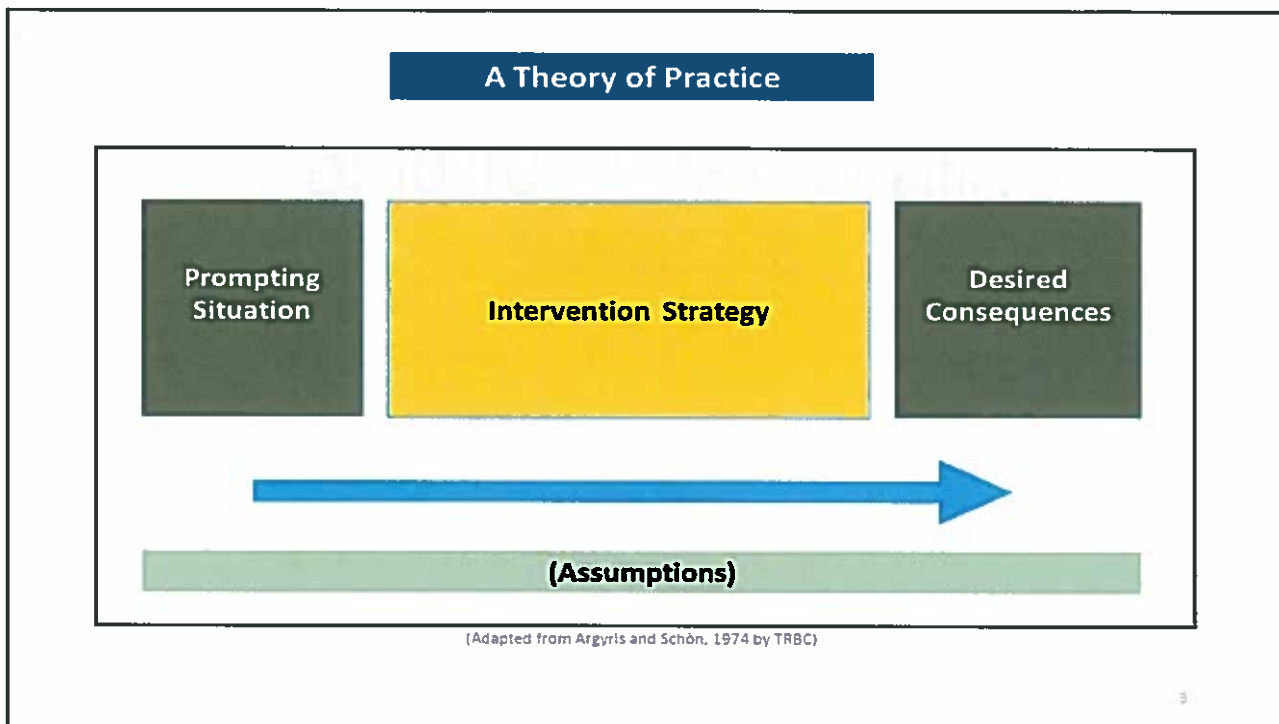
**Duration:** 15 minutes

# Alliance TEAM-BUILDING SESSION 2

1

INSERT Consensus Statement from Session 1

2



*A theory of practice sets out the reasoning behind an intervention:*

- 1. why is the intervention necessary (the 'prompting situation')*
- 2. what change is being sought (the 'desired consequences')*
- 3. how is the change to be brought about (the 'intervention strategy'), and what assumptions underlie the analysis (the 'assumptions')*

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# **Alliance of the Consumer Panel and Health Service Executive**

## **Outline Terms of Reference**

- Name, establishment date and term...
- Accountable to...
- Purview and specific objectives...
- Membership criteria... (inclusion/exclusion criteria; number; quorum; rotation)
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