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MODULE 3:
Shared Decision Making

Ontario Support Program
Workshop for OHT Collaborative Leaders

Tuesday, March 1, 2022
Thursday, March 3, 2022

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Land Acknowledgement

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Workshop Objectives

- Discuss how to negotiate good decisions (evidence-informed)

- Explore shared decision-making processes, including:
  - *_WHAT_ type of decisions will be made by _WHOM_*
  - *_WHEN_ other stakeholders should be engaged/consulted to inform decisions*
  - *_HOW_ decisions will be negotiated among partners to ensure they are thoroughly debated, and diverse views are incorporated*

- Network with other OHTs & reflect with your own OHT leadership group

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Setting Intentions for Today

Imagine you are in a Collaboration Leadership meeting with other OHT Leaders/Partners. How would you engage?

- **Be present** (*video on; mute unless you are speaking; not multi-tasking*)

- **Fully participate** (*raise questions; share experiences & insights*)

- **Leverage this networking opportunity** (*take the opportunity to hear/learn from leaders/OHTs*)

- **Take care of yourself** (*take breaks when provided; ask for clarification*)
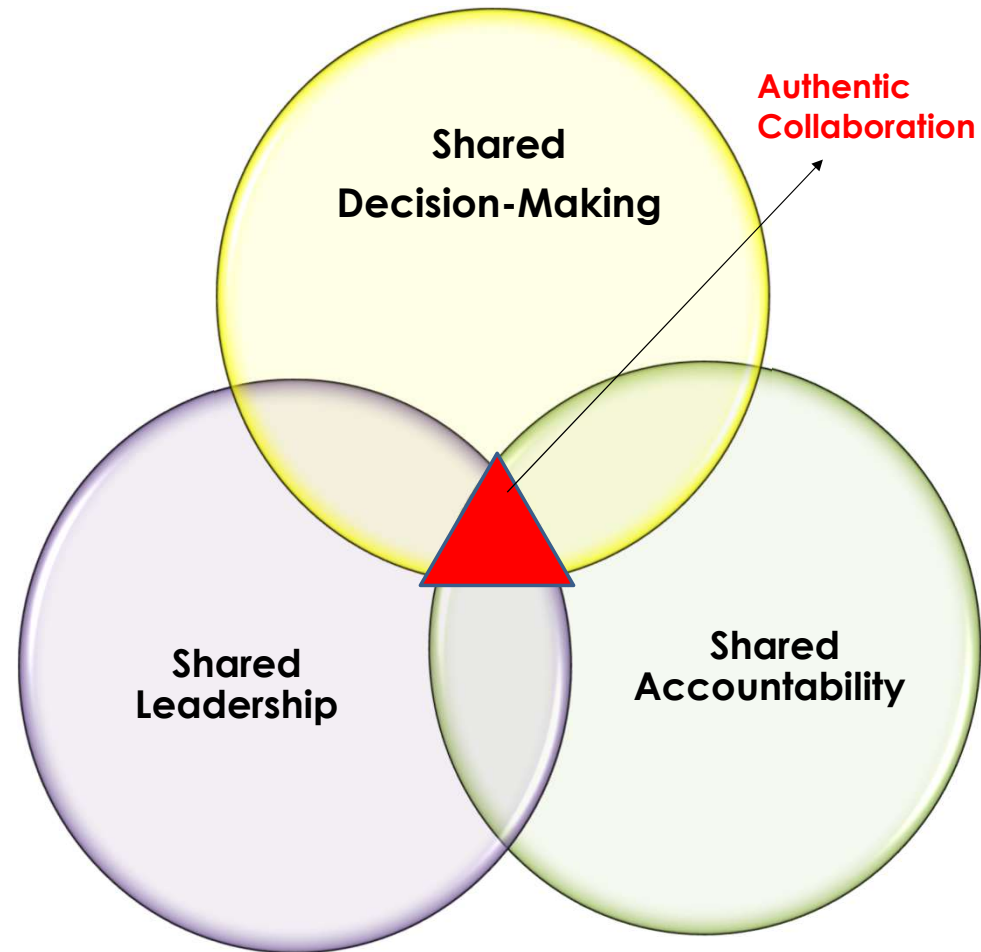
Where is your OHT with respect to Enabling Shared Decision-Making (SDM)?

_____

Documented SDM intentions
in joint venture agreement

Starting to 'practice'
SDM intentions

Routinely use SDM
to make effective decisions

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SHARED DECISION-MAKING:
A Component of
Collaborative Governance

Shared Decision-Making

Authentic Collaboration

Shared Leadership

Shared Accountability

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Shared Decision-Making for Non-Profit Governance, Ignite NPS, September 2019
Heather Graham and Linda Mollenhauer

GETTING TO GOOD DECISIONS

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The Consequences of Bad Decision-Making

- Wasted Time & Money

- Bad Bets

- Lost Opportunities

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Missteps on the Road to Good Decisions

- Narrow framing (not generating and considering enough options)
- Confirmation bias (the tendency to give more credence to evidence that confirms your beliefs and to undervalue that which does not)
- Overweighing short term emotions, including discomfort or fear associated with some options
- Overconfidence in the selected option rather than testing its strength and impact through further deliberation or scenarios

Adapted from Chip and Dan Heath. Decisive

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Principles for Good Decision-Making

Can we think beyond the outcomes?

- ❑ Be intentional
- ❑ Frame decisions
- ❑ Recognize complexity
- ❑ Navigate uncertainty
- ❑ Use information
- ❑ Right-size analysis
- ❑ Focus on the future

SOURCE: Decision-Making for Impact: How to make smarter decisions in service of your Mission. Stanford Social Innovation

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ENABLING SHARED DECISION-MAKING

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Definition: Shared Decision-Making

*A **complex process** in which decisions are made in a **collective way** that is **dispersed more broadly** than a few individuals in key positions*

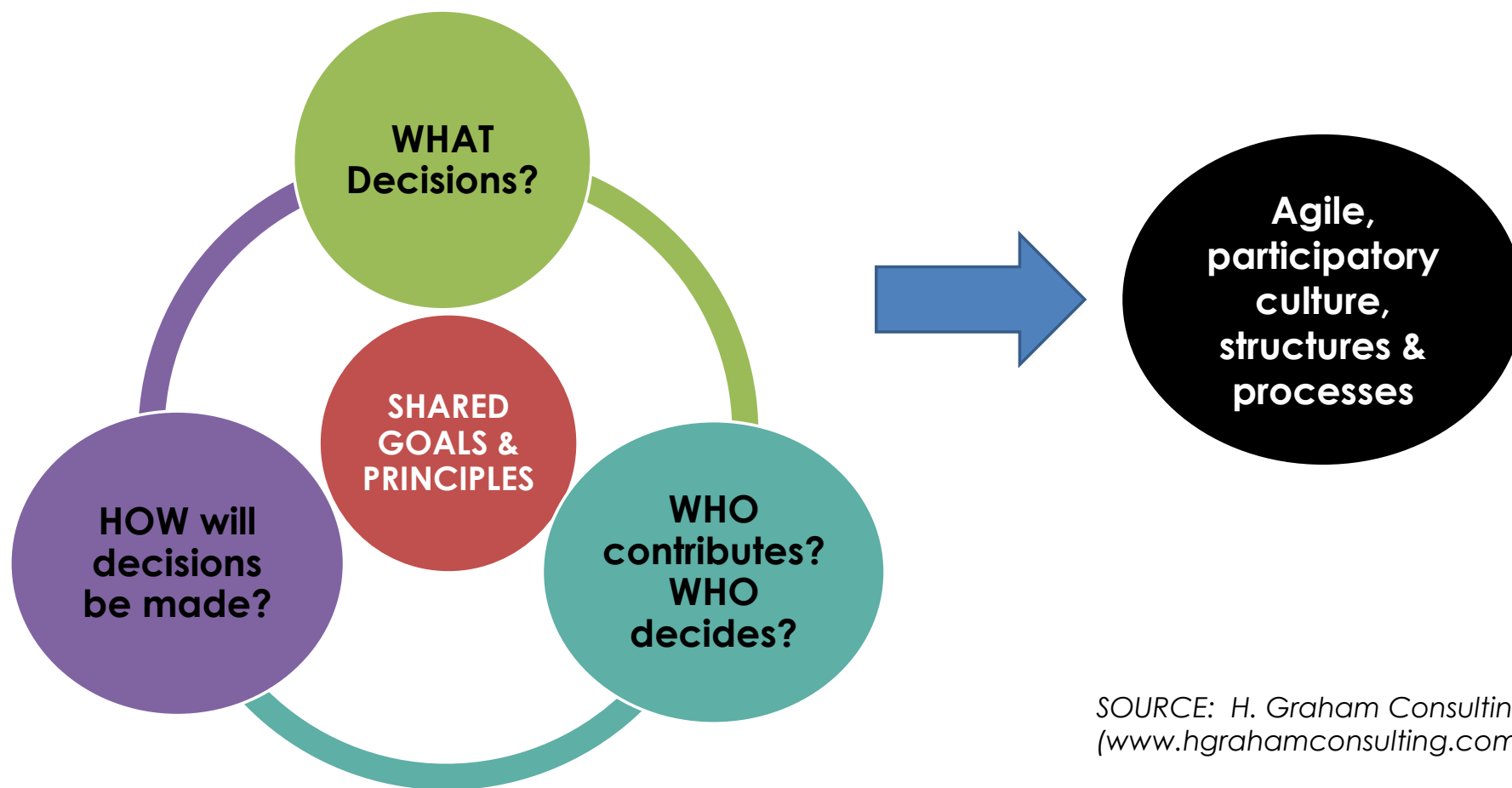*SOURCE: Shared Decision-Making for NP Governance, H. Graham & L. Mollenhauer (Sept. 2019)*

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What Distinguishes Shared Decision-Making?

- Partners bring unique and diverse perspectives and experience

- Must stay focused on your common purpose at the 'table' (*collective 'good' versus individual organizational imperatives*)

- Partner organizations must give up control to negotiate consensus

- Requires a high degree of trust

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Form Should Follow Function

WHAT Decisions?

SHARED GOALS & PRINCIPLES

HOW will decisions be made?

WHO contributes? WHO decides?

Agile, participatory culture, structures & processes

SOURCE: H. Graham Consulting (www.hgrahamconsulting.com)

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WHAT decisions?

Decision Types	Scope & Impact AND Level of Familiarity & Frequency
Big-bet decisions with major consequences for the collaboration, often involving situations with unclear or wrong choices	• **Broad scope and impact; <u>Unfamiliar</u> and <u>Infrequent</u>**
Cross-cutting decisions that require broad collaboration across organizational boundaries	• **Broad scope and impact; <u>Familiar</u> and <u>Frequent</u>**
Delegated decisions that can be assigned to operational teams that are primarily accountable	• **<u>Narrow scope and impact</u>; Familiar and Frequent**

SOURCE: Adapted from A. De Smet, McKinsey Quarterly (June 2017)

WHO makes them?

Decision Types	Decision-Makers
Big-bet decisions **Broad scope and impact;** **Unfamiliar and Infrequent**	EXAMPLE: Collaborative Leadership Group and/or Strategic Governance Council ➢ _Decisions that change existing service patterns for partner organizations (significantly impacting organizational budgets, organizational priorities, organizational operations, level of organizational risk)_
Cross-cutting decisions **Broad scope and impact;** **Familiar and Frequent**	EXAMPLE: Collaborative Leadership Group and/or Operational Work Groups ➢ _Decisions that determine new partners, allocation of resources for Working Groups, 'mutually reinforcing' roles, or coordination of care/services across organizational boundaries_
Delegated decisions **Narrow scope and impact;** **Familiar and Frequent**	EXAMPLE: Collaborative Leadership Group and/or Operational Work Groups ➢ _Decisions that determine how care/services are delivered, including protocols required for special populations_

WHO is engaged/consulted to inform these decisions?

- Partners need to negotiate parameters re: when to engage/consult with others:

FOR EXAMPLE - Decisions that 'cross silos/boundaries':

  ➢ *Decisions that require the Collaborative Leadership Group to consult with the Boards of partner organizations*
  ➢ *Decisions that require Operational Work Groups to consult with the Leadership Group*
  ➢ *Decisions that require the Collaborative Leadership Group/Operational Work Groups to consult with 'other' stakeholders: clients, clinical staff/leaders, volunteers, other community-based organizations, etc.*

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BREAK OUT GROUPS

Heather Graham Consulting
Services

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SMALL GROUP DISCUSSION (30 minutes)

- Identify a recorder (to capture highlights) and reporter (to share one big bet decision identified):

- Working from the sample descriptions of potential decisions provided in your worksheet, think of at least one example of each type of decision that your OHTs have considered/will be considering (for question 1 below), and then answer questions 2 & 3 in relation to these decisions.

   1. What type of decision is this? (*i.e. big bet, cross-cutting or delegated*),

   2. Who should make these decisions (*Strategic Governance Council; Collaborative Leadership Group; Operational Work Groups; <u>combination</u>, other*)?

   3. Who else should be engaged/consulted to inform these decisions, and based on what 'parameters' (*i.e. level up OR other stakeholders; in specific circumstances/conditions*)?

   <u>NOTE: Be prepared to share with the large group one example of a BIG BET decision (including who should make this decision and who else should be engaged/consulted to inform this decision – based on identified parameters).</u>
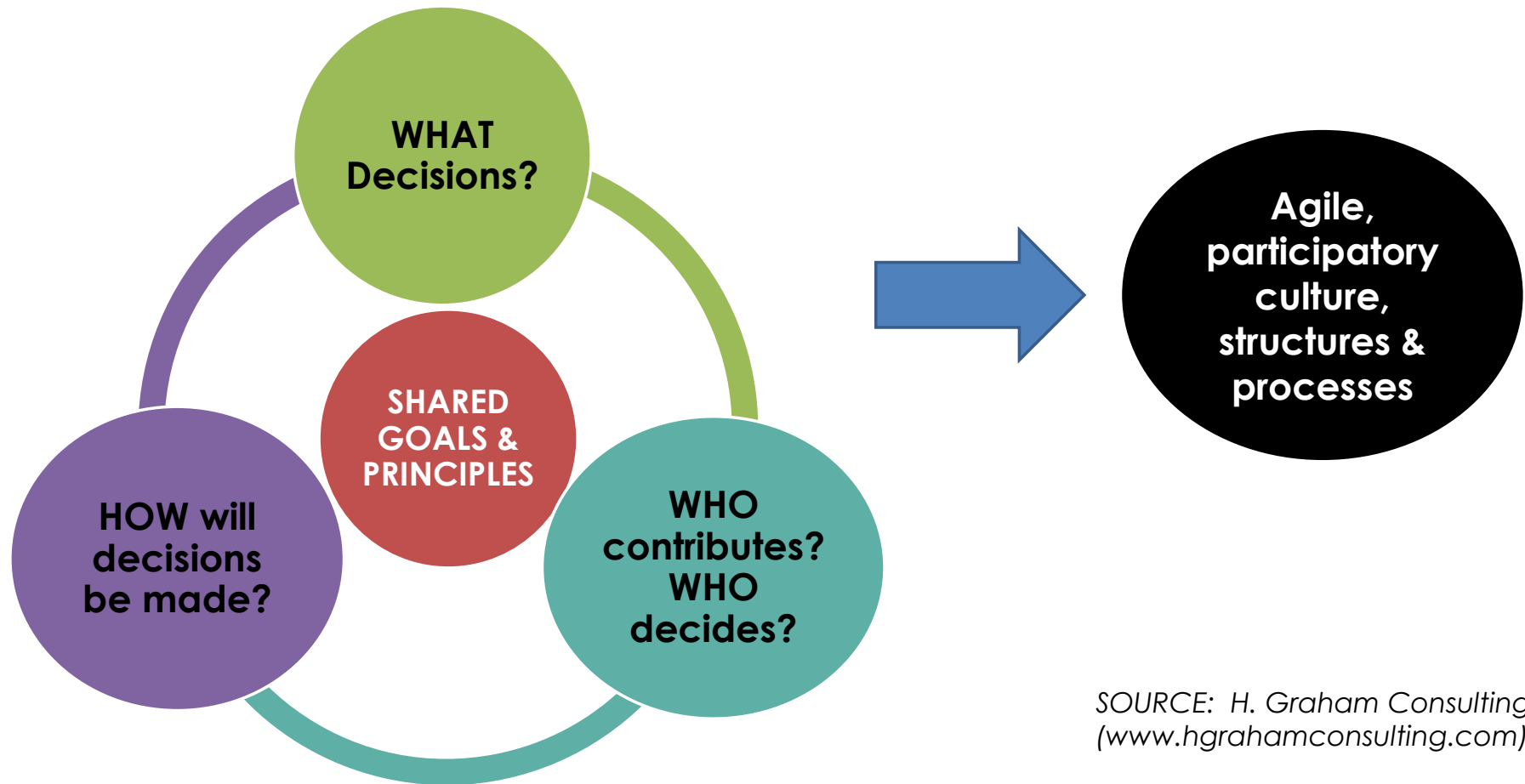
DEBRIEF

Share one example of a BIG BET decision including:

- *who should make this decision, and*

- *who else should be engaged/consulted to inform this decision*

'HOW' SHARED DECISIONS ARE MADE

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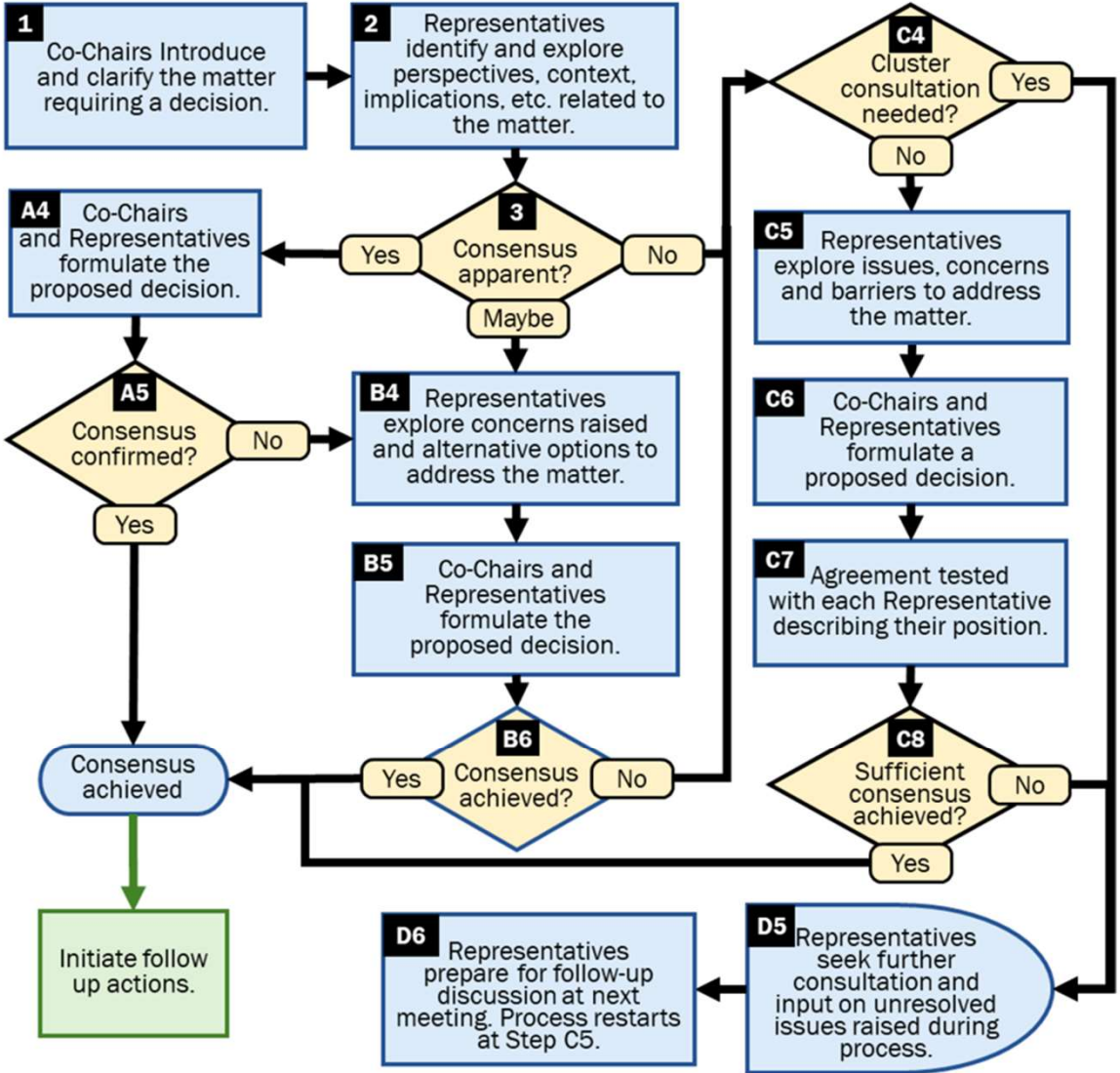School of Public Health

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Form Should Follow Function

WHAT Decisions?

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HOW will decisions be made?

WHO contributes? WHO decides?

Agile, participatory culture, structures & processes

SOURCE: H. Graham Consulting (www.hgrahamconsulting.com)

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HOW will shared decisions be made (negotiated)?

- **Consensus-based Decision-Making** (100% commitment versus 100% agreement)

  "In the interest of what is best for the OHT (and the shared vision/community served), I can live with this decision, support it and carry it forward"

- **The Consent Principle (Circle Forward)**

  - *Consent means there are no significant objections to a policy (i.e. doesn't require agreement, affirmation or preference)*
  - *Consent is reached when no one is aware of a risk that we can't afford to take*
  - *Only certain decisions are made by consent (i.e. governance decisions that need solidarity to move forward; BIG BET decisions)*

  OTHERS?

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Consensus Decision-Making Process Middlesex-London OHT

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Used with permission from Middlesex London OHT, formerly Western Ontario OHT. Currently under revision

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POLL: Common Pitfalls

- Articulated a shared decision-making process, but haven't yet implemented it

- Don't know how to successfully facilitate a shared decision-making approach (*lack of experience/training; Chair oriented in 'top-down'/authoritarian approach*)

- 'Urgency' outweighs 'good process & shared ownership/commitment'

- Pre-existing power dynamics get in the way

- OTHERS (use chat)?

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Success Factors: Making Good Shared Decisions

- Partners agree on shared decision-making principles, processes and actively work to embed them into collaboration/joint venture agreements and practices (proper training/orientation)

- Sufficient time is allocated to negotiate decisions that are thoroughly debated and incorporate diverse and important views/perspectives

- Decisions are made in the best interests of the collaboration (and those served)

- Partners identify a process for occasions when consensus cannot be reached

- Partners regularly assess how they are doing (relative to intentions) and identify opportunities for improvement

BREAK OUT GROUPS

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SMALL GROUP DISCUSSION (25 minutes)

- Identify a recorder (to capture highlights) and reporter (to share one key insight from the discussion)

- Discuss the following questions:

  - *What shared decision-making process has your OHT identified to make collaborative governance decisions?*

  - *What pitfalls/challenges has your OHT experienced with respect to implementing/facilitating good shared decision-making practices?*

  - *Reflecting on the SDM processes and success factors we just discussed, what changes might you make to your current processes and practices?*

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DEBRIEF

Share one key insight from your conversation with the large group.

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Materials for Discussion/Reflection with Leadership Council

Key Messages: Module #3	• Good decision-making requires **clarifying who makes what decisions, who contributes to/informs decisions, and how decisions will be made**. • An **agile and participatory culture, structure and processes will enable shared decision-making** • There are **emerging principles and promising practices for good decision making** that should **inform how decisions are made**
Reflection Questions:	• Where is your OHT with respect to enabling shared decision-making (SDM) (i.e., *documented SDM intentions in joint venture agreements; starting to 'practice' SDM intentions; OR Routinely use SDM to make effective decisions*). • How can you begin to evolve towards an agile and participatory culture, structure and processes? • What are the types of decisions that you need to be made by whom? (i.e., big bet, cross-cutting and delegated decisions; Strategic Governance Council; Collaborative Leadership Group; Operational Work Groups)? • What broader stakeholders need to be consulted/engaged in these decisions? • What shared decision-making process does your OHT use to make collaborative governance decisions, and what have you learned about this process? *(i.e,. When it works best?; What is challenging?; What you might do differently?)*

Materials for Discussion/Reflection with Leadership Council

Practices	
	❏ Using a variety of strategies, we ensure that diverse perspectives at our decision-making tables are heard and valued in making decisions.
	❏ We have established mechanisms for both timely and transparent communications, ensuring that all partners have access to the information they need to inform good decision-making.
	❏ Partners agree on principles and processes for decision-making that encourage shared commitment and ownership for decisions (e.g., consensus-based decision making/the consent principle) that are embedded into our agreements and practices (e.g., Relationship Charter, Collaboration Agreement, Joint Venture Agreement, etc.)
	❏ When making decisions, partners at the Collaborative Leadership Council allow sufficient time to make good, proactive decisions (e.g., ensuring that the problem and options are well-framed, that options are thoroughly debated, that we work through consent/consensus to build shared commitment and ownership for decisions, and that the decisions are made in the best interests of those we serve).
	❏ We acknowledge that there are power dynamics at play within our collaborative leadership council and we have identified strategies to surface and jointly navigate tensions/conflicts (e.g., creating an open and transparent culture; engaging a neutral coach/facilitator, designating a separate session to work through these issues chaired by one of our partners, etc.)
	❏ We have built time into our Collaborative Leadership Council processes for regular reflection on the quality of our decision-making processes and the decisions we have made, with a view to improving our future governance processes.

Materials for Discussion/Reflection with Leadership Council

Tools	
	www.collaborationcoach.ca Building trust and managing conflict (keys to success) Conflict resolution – process steps Effective communications in collaborations: critical factors Sample templates for a simple and complex collaboration agreement **https://circleforward.us/** Principle of Consent (shared decision-making process and tools) **https://theonn.ca/wp-content/uploads/2020/08/SharedGovernance_final-Sep2019_v2-002.pdf** Paper on 'Shared Decision-Making for Non-Profit Governance' (H. Graham & L. Mollenhauer) Chip and Dan Heath. Decisive: How to make Better Choices in Life and Work (Random House Canada) **https://www.seedsforchange.org.uk/shortconsensus.pdf** Introduction to consensus decision making. Seeds for Change. **Note: Resources available at https://hspn.ca/advanceoht/advance-resource-repository/**

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Thank you!

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