

MODULE 3: **Shared Decision Making**

Ontario Support Program
Workshop for OHT Collaborative Leaders

October 27, 2022

ADVANCE Program Accountability, Shared Leadership and Governance



Land Acknowledgement



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

Setting Intentions for Today

- **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)?

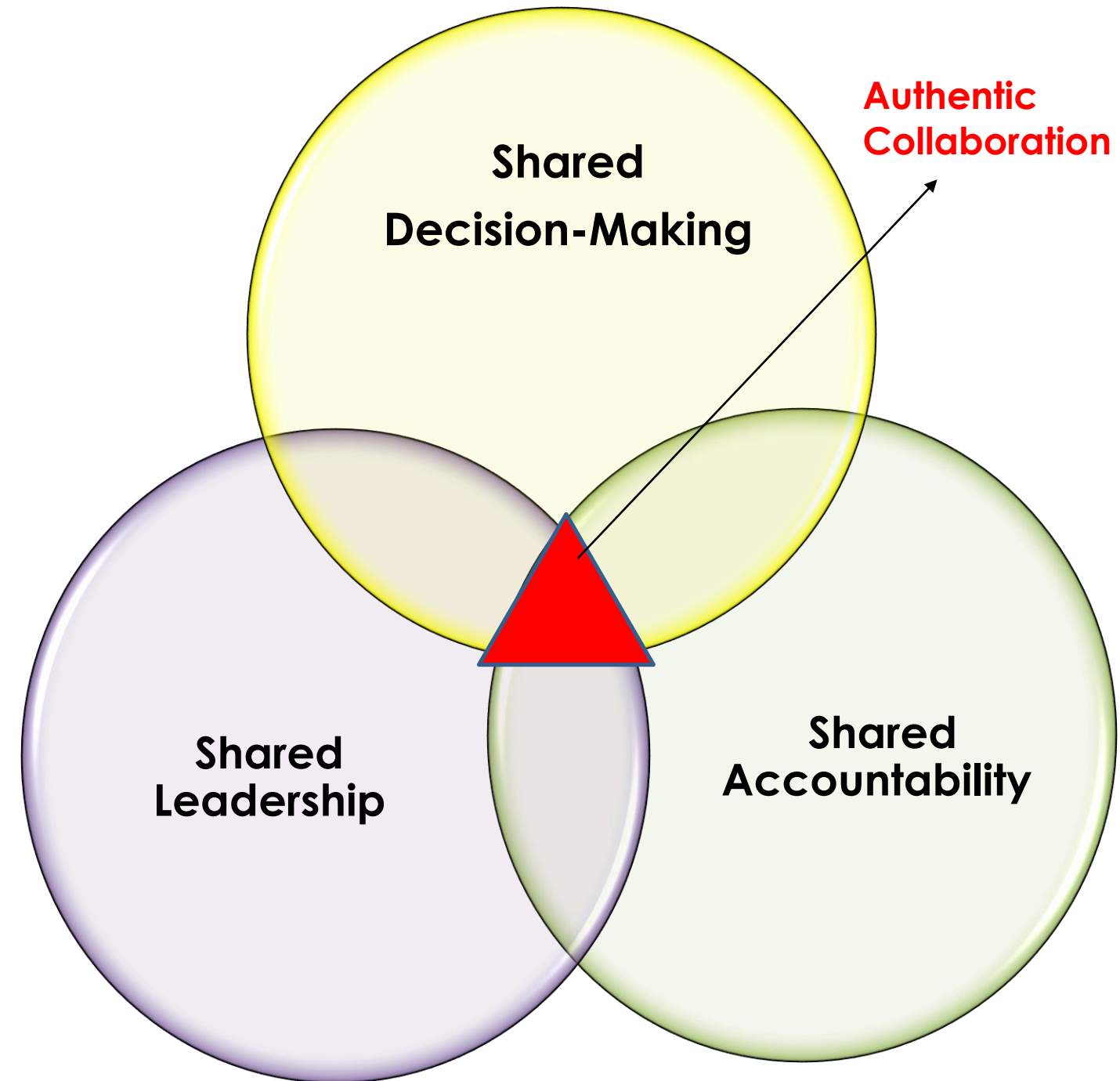
No Formal Agreement on Decision Making

Documented SDM Intentions in agreement

Starting to 'practice' SDM to make effective decisions

Routine use of SDM to make effective decisions

SHARED DECISION- MAKING: A Component of Collaborative Governance



GETTING TO GOOD DECISIONS

The Consequences of Bad Decision-Making

- Wasted Time & Money
- Bad Bets
- Lost Opportunities



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



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

ENABLING SHARED DECISION-MAKING



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)



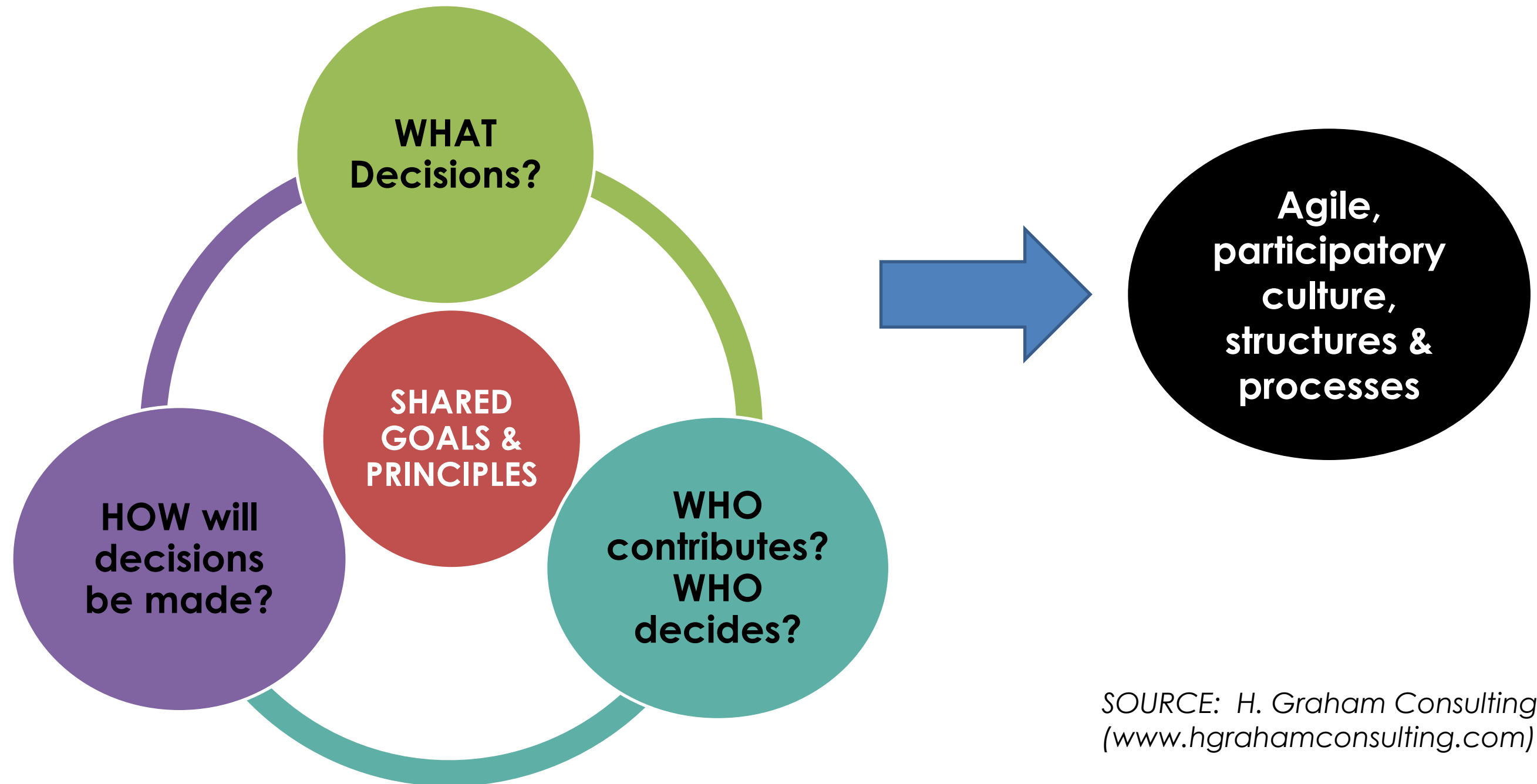
What Distinguishes Shared Decision-Making?

- 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

SOURCE:

www.collaborationcoach.ca

Form Should Follow Function



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

WHAT decisions?

Decision Types	Scope & Impact AND Level of Familiarity & Frequency
<p><u>Big-bet decisions</u> with major consequences for the collaboration, often involving situations with unclear or wrong choices</p>	<ul style="list-style-type: none">• Broad scope and impact; <u>Unfamiliar and Infrequent</u>
<p><u>Cross-cutting decisions</u> that require broad collaboration across organizational boundaries</p>	<ul style="list-style-type: none">• Broad scope and impact; <u>Familiar and Frequent</u>
<p><u>Delegated decisions</u> that can be assigned to operational teams that are primarily accountable</p>	<ul style="list-style-type: none">• <u>Narrow scope and impact; Familiar and Frequent</u>

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

WHO makes them?

Decision Types	Decision-Makers
<p><u>Big-bet decisions</u> Broad scope and impact; Unfamiliar and Infrequent</p>	<p>EXAMPLE: Collaborative Leadership Group and/or Strategic Governance Council</p> <ul style="list-style-type: none"> ➤ <i>Decisions that change existing service patterns for partner organizations (significantly impacting organizational budgets, organizational priorities, organizational operations, level of organizational risk)</i>
<p><u>Cross-cutting decisions</u> Broad scope and impact; Familiar and Frequent</p>	<p>EXAMPLE: Collaborative Leadership Group and/or Operational Work Groups</p> <ul style="list-style-type: none"> ➤ <i>Decisions that determine new partners, allocation of resources for Working Groups, ‘mutually reinforcing’ roles, or coordination of care/services across organizational boundaries</i>
<p><u>Delegated decisions</u> Narrow scope and impact; Familiar and Frequent</p>	<p>EXAMPLE: Collaborative Leadership Group and/or Operational Work Groups</p> <ul style="list-style-type: none"> ➤ <i>Decisions that determine how care/services are delivered, including protocols required for special populations</i>

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.*

BREAK OUT GROUPS

Heather Graham Consulting
Services

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; combination, 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*)?

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).

DEBRIEF

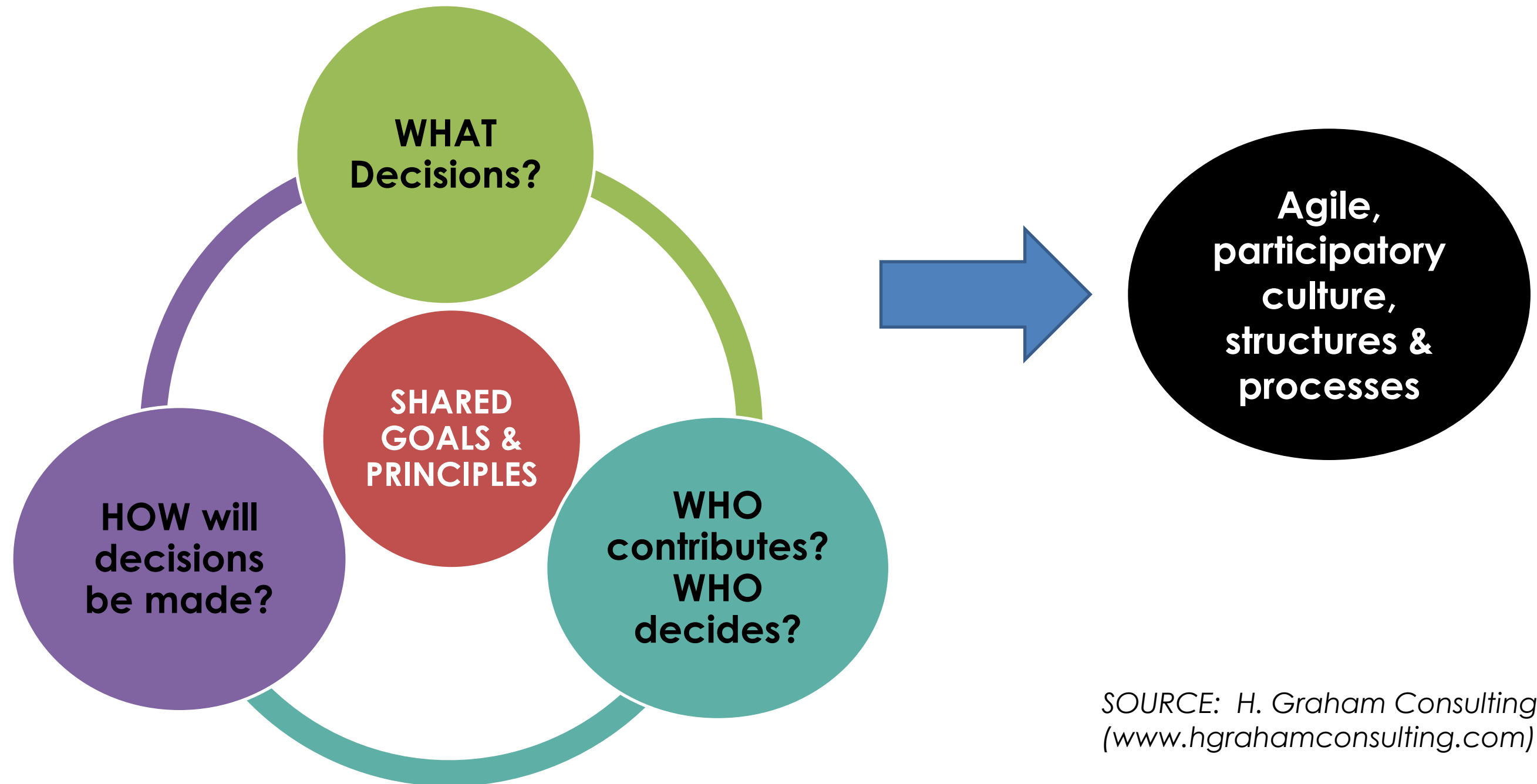
Share one example of a BIG BET decision including:

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

'HOW' SHARED DECISIONS ARE MADE



Form Should Follow Function



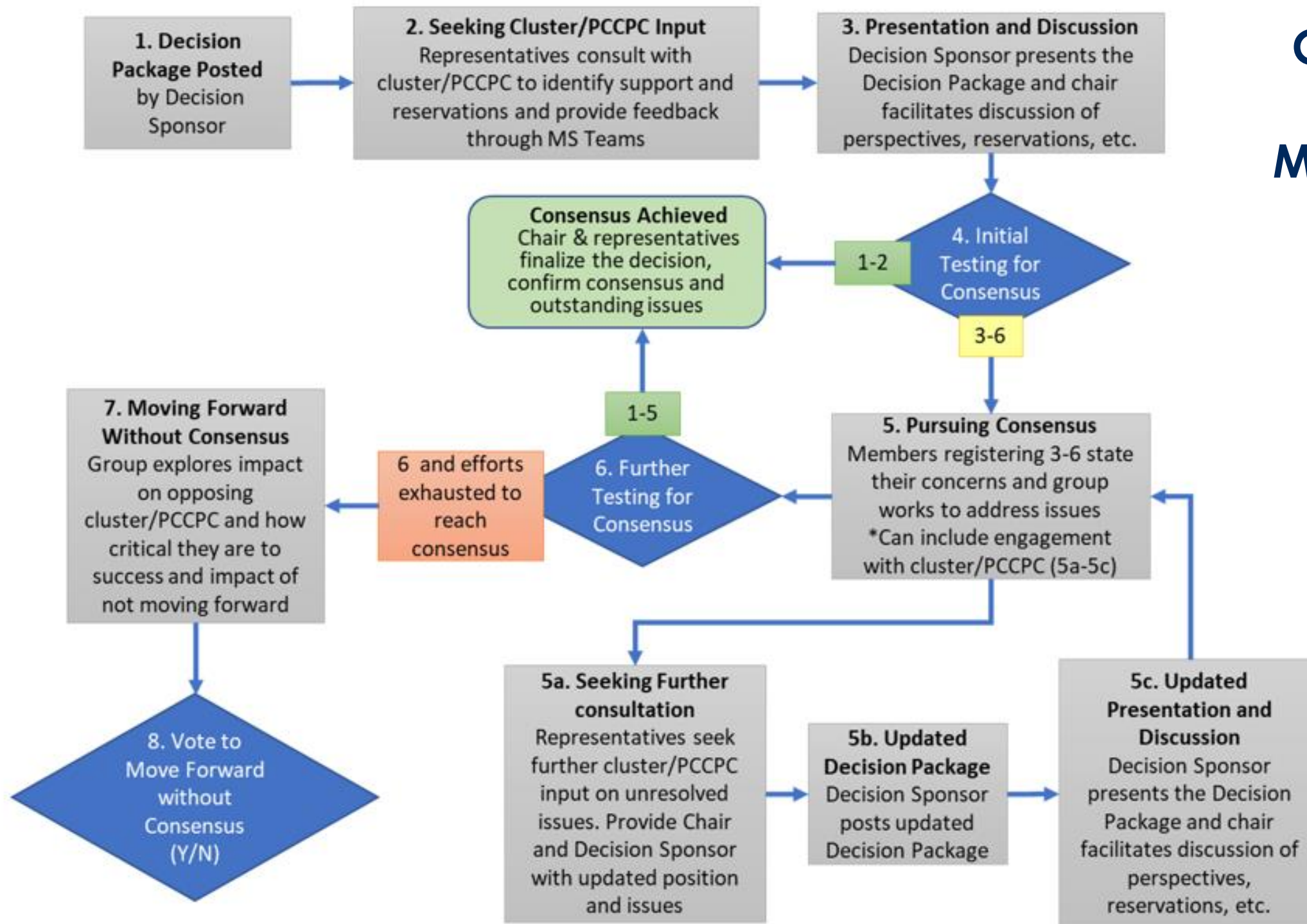
SOURCE: H. Graham Consulting
(www.hgrahamconsulting.com)

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”*
 - *BUT... implementation in practice can be challenging*
- **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?

Consensus Decision-Making Process Middlesex-London OHT



Used with permission from
Middlesex London OHT, formerly
Western Ontario OHT

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
- We've tried to implement consensus-based decision-making, but ended up voting when we couldn't agree on the consensus
- 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

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 /do you anticipate 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? Or if too early, what processes do they think will work best in their OHT and why?*

DEBRIEF

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

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://theonnc.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/>

Thank you!