



2017

UNION LEADERS  
LEADING PARTNERSHIP

COALITION OF  
KAISER PERMANENTE  
**UNIONS**

# FACILITATING INTEREST BASED PROBLEM SOLVING

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# Who am I?

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- Bargaining Unit president – SEIU
- Natl Strategy Group
- Labor co-lead SC LMPC
- BPk – first CDM & IBPS process in LMP
- Natl Barg 2000
- SoC IR, IBPS & CDM 2001
- Win-Win Bargaining 1991
- Retired from KP 12/16



# Who are you?



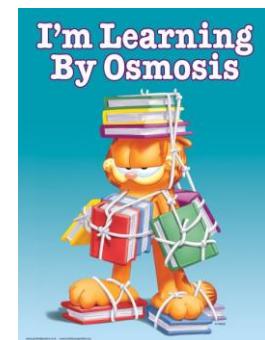
Region?  
Training in facilitation?  
Participated in IBPS process?  
Facilitated IBPS process?  
Had a great vacation this year?

# Course Objectives

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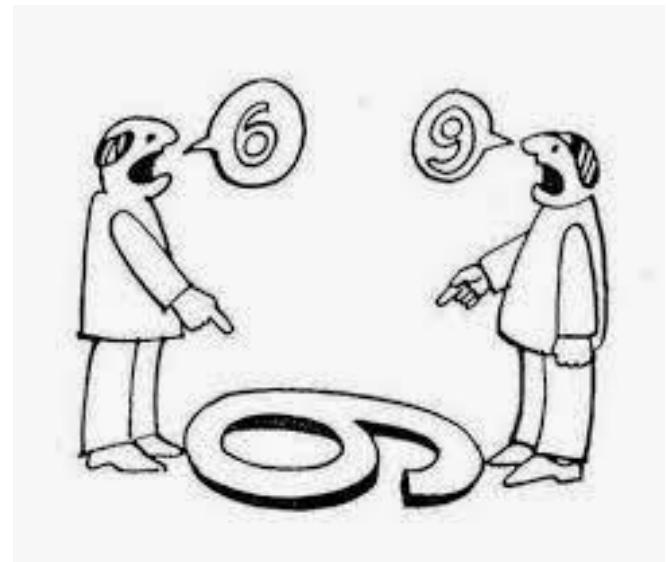
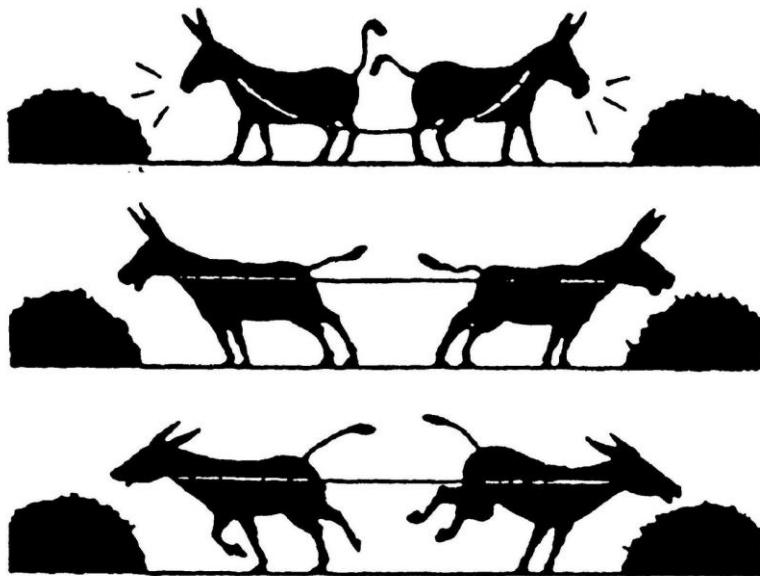


- Understand when IBPS is the best process
- Be able to identify when & how to contract
- Gain familiarity with facilitating the 4 step IBPS process
- Opportunity to practice
- What would you like to get out of today?



# Is IBPS the best process?

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# Contracting

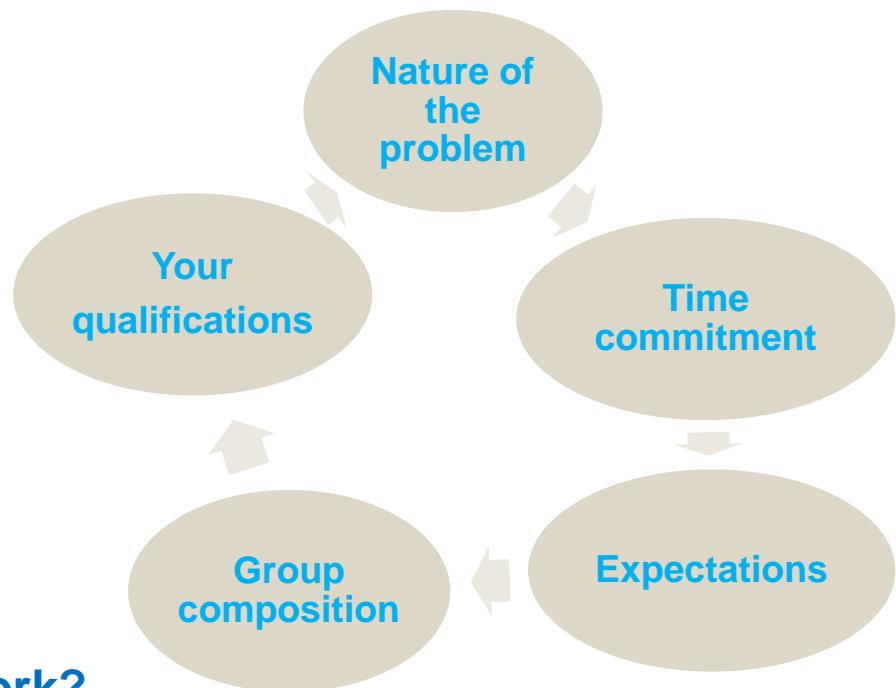
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- Sponsors +/or key stakeholders (who is asking you to do this work?)**

## How?

- 1. Assessment**
- 2. Is it a fit?**
- 3. Agree or not**
- 4. Written agreement**
  - Scope of work**
  - What, when, who**
  - Who will document the work?**



# Facilitating the group



- Define & describe conflict (stakeholders have different ideas on how to solve a problem)
- Explain the natural processes of conflict resolution: fight, flight, unite



- We can avoid it - flee
- We can attack - **fight**
- We can handle it effectively - **dialogue**

- Group agrees to respect people & differences; agrees to attack the problem
- Explain that planning, implementing & evaluation are key components to successful decisions
- Group creates ground rules

# Steps 1 - 4

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**Explain the 4 step process (usually you will be training as you go through the process)**

## **Step 1: Define the problem & formulate the question**

- Gain a common, simplified understanding of the problem

## **Step 2: Determine interests**

- Concerns, needs, qualities behind or underneath an issue

## **Step 3: Develop options**

- Possible solutions that will resolve the issue in whole or part

## **Step 4: Select a solution based on criteria**

- Combine options to reach a solution that meets the needs of all stakeholders (not necessarily the first choice of some or all)

# Formulating the Question

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- ✓ Have them look at history, present situation & need for change
- ✓ Why is it a problem?
- ✓ What are your options?
- ✓ What are the best, worst & most probable solutions?
- ✓ What is the best, worst & most probable outcome if you solve this problem?
- ✓ What if you don't?

- ✓ Legitimize all perceptions
- ✓ Discuss rather than list

Facilitator note: The questions are more important than the answers

# Formulating the Question

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Suggest they begin their question using phrases such as...

- “How might we ...?”
- “How shall we ...?”
- “What shall we ...?”



Share examples unrelated to this problem

- Avoid questions that:
  - Can be answered “Yes” or “No”
  - Contain a solution(s) to the problem
  - Blame people for the problem
  - Include interests
- Agree with consensus

# Develop Interests



- Each stakeholder group will develop & chart their own interests.**  
Union members can do this together or separately by union or classification or other
- Explain the difference between a position & an interest**
- Ask each group to identify 5-10 interests:**
  - **Why do you want to resolve the problem?**
  - **What matters to the stakeholders in & out**
  - **What concerns them (pain points, causes**
  - **What is at the heart of the matter?**
  - **Why do they believe a change is needed?**
- Ask the group to agree on a time limit**

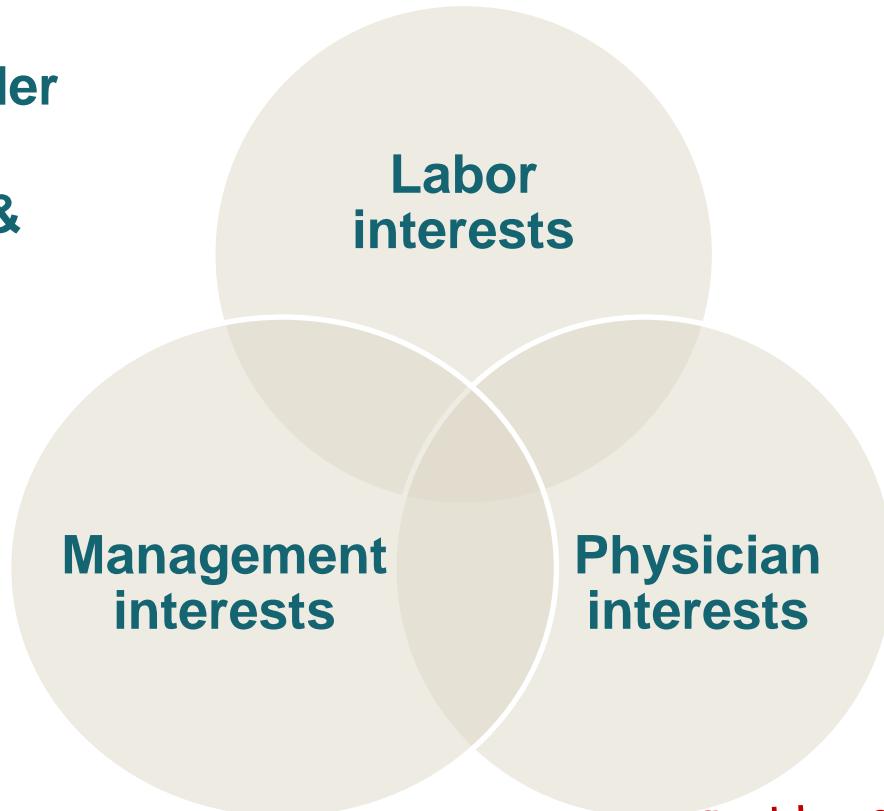


# Share Interests

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**Each stakeholder group shares their interests & answers clarifying questions**



**Group identifies common interests\***

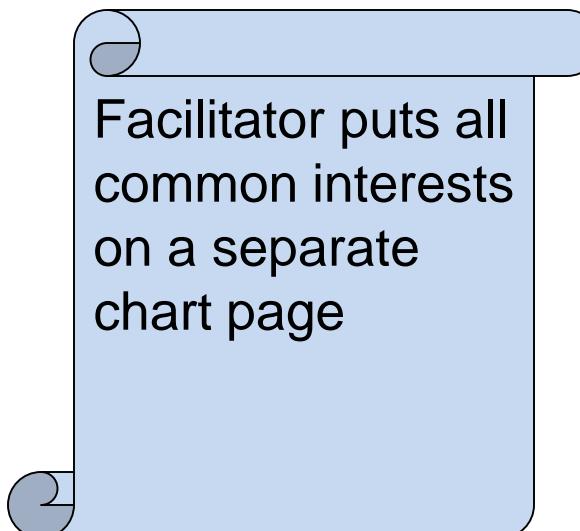
Facilitator circles common interests identified by group, helps group eliminate positions, prevents challenges poised as questions

# Common Interests

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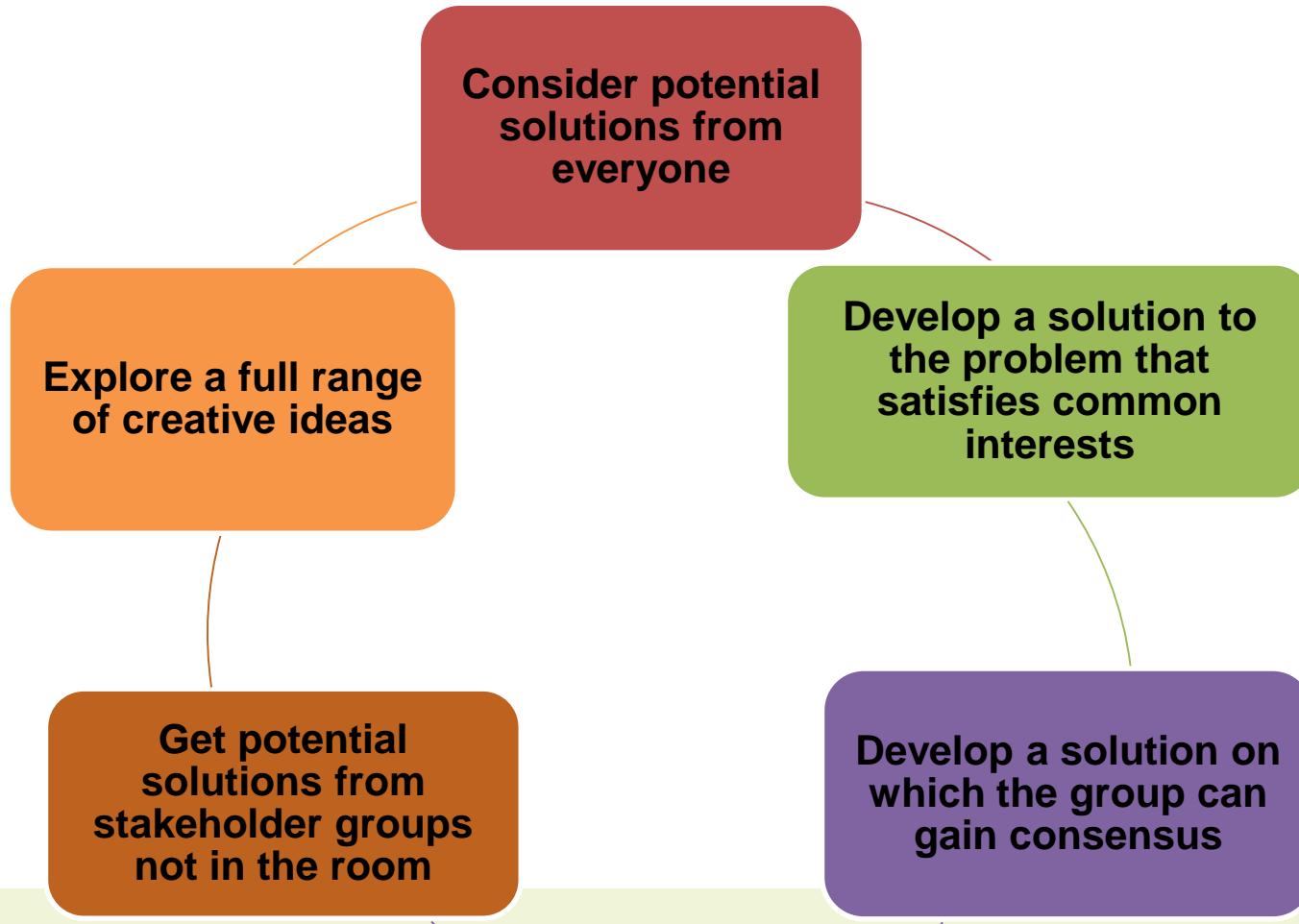
- **Interests that are identical to their own**
- **Interests that are conceptually similar**
- **Interests of others that they can support**



Assure stakeholders that their other interests won't be forgotten

# Develop Options

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# Develop Options

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## ❖ Brainstorming

- Help the group work together to generate as many possible solutions as they can which could satisfy the underlying interests identified in the previous step
- Go for quantity
- Build on ideas of others
- Any idea is OK

## ❖ Best practices

## ❖ Straw design

## ❖ Expert panel

## ❖ Gap analysis

## ❖ Visioning

What are the challenges with these?  
Which is/are best for your group?

Silence is  
your friend-  
“2 pauses”

# Selecting a Solution

## Narrow the list (consensus required)

- Eliminate/ combine duplicates
- Eliminate grossly impractical options



## Shorten the list (consensus required)

- Number all options
- Agree on process (e.g. sticker ranking)
- Focus on the most frequently selected
- Narrow the list to 3 – 5 choices



# Select a Solution

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Develop 4-6 objective standards against which each possible solution is measured

- Encourage the group to look at their common interests
  
- Have them consider:**
  - Workable
  - Equitable for all parties
  - Fair
  - Doesn't violate CBA
  - Ethical
  - Within cost
  - \*\*\*Capable of being implemented\*\*\*



# Select a Solution

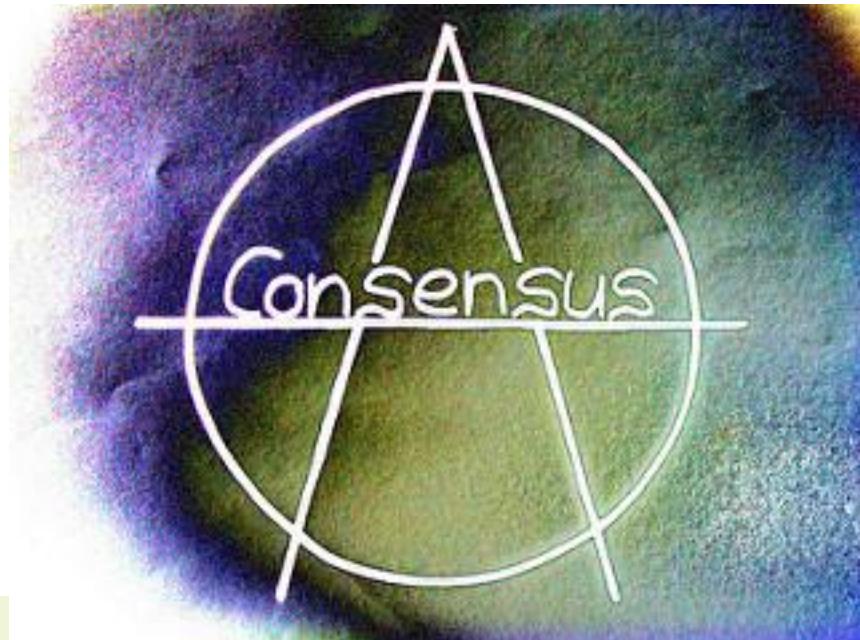
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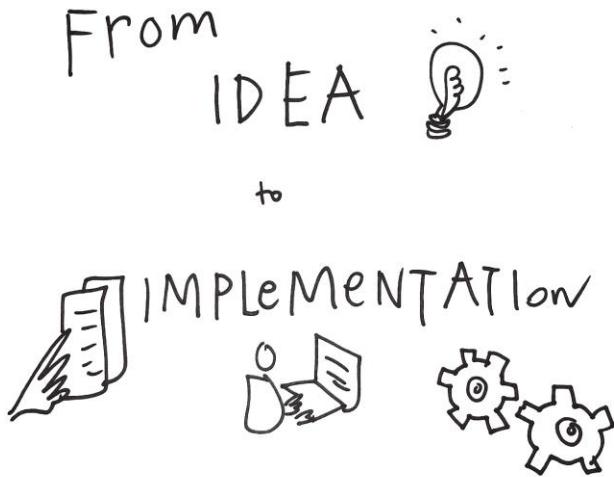
**Group selects 1 or combo for implementation**



Facilitator note: Groups get caught up in the momentum. Might need to validate with stakeholders not present.



# Implementation & Evaluation



Facilitator note: utilize the implementation tools on the LMP website. Include comprehensive communication plan.



# Celebrate!



# Time to Practice!

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## Scenario

Only 15% of the employees & physicians in your MOB are exercising at least 3 times a week. The Healthy Workforce Comm has had poster campaigns & sent emails encouraging 30 minutes of exercise at least 3 times a week. They hosted a fair that was not well attended.

Frontline staff aren't able to take time during work for exercise or the fairs due to staffing demands.

They have asked for your assistance as everyone has different ideas on how to address this.

## Stakeholders

Physicians (2)

Managers (3)

UFCW & UNAC members (RN, LVN, MA, Receptionists, Lab & Pharmacy Techs) (1 of each)

Facilitator: You met with the co-leads of the team & are attending a 1 hour meeting with the committee.

How would you start?

Facilitator (1)

Coach (1)

# Course Objectives

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## How did we do?

- Understand when IBPS is the best process?
- Be able to identify when & how to contract?
- Gain familiarity with facilitating the 4 step IBPS process?
- Opportunity to practice?
- Did you get what you wanted today?

