

## Facilitating Community Engagement

By

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Healthcare leaders are now expected to shape programs and lead the management of population health, deal with price transparency, promote Accountable Care Organization (ACO) attribution and connect the dots for value-added purchasing. These are issues worthy of community engagement. Leaders must seek ways to help the community *understand* their role and responsibilities for planning, decision-making, executing change, and understanding limitations.

Why should engagement be a priority? There is an escalating consumerism in healthcare. Individuals now have more provider and price data available to them and greater choice in service options, and higher levels of cost sharing impacting their decision making. More than ever, a CEO needs to connect with the community as consumers, to understand how strategic issues are perceived in the market place and how local decisions will impact the use of hospital services.

**The Engagement Process:** The purpose of an engagement process is to build understanding and align community interests at the wholesale level. How the engagement process unfolds will determine the level of success. How does the hospital create shared agendas and elevate community dialog? How does the community begin to see a vision, one that requires new and different paths? What are the difficult issues facing the hospital relative to potential outcomes?

The process can introduce new plans and bold expectations, strive to build understanding and knowledge, and embrace critical feedback. Don't wait until there is an issue or problem. Get on top of the hill before the snowball starts rolling down it, over you. A robust engagement process goes a long way toward this end.

**Be the Initiator:** First and foremost hospitals must seek to initiate an objective engagement process. As the initiator, the hospital can proactively set the agenda, select participants and the terms of the engagement process. Absent your leadership, a similar process can be initiated by a health plans, community activists, or major employer, who will bend the process to their advantage and limiting the role of the hospital. Once initiated, you will strive for regularity and consistency.

**Identify the Stakeholders:** You will need to identify community members to invite to join the engagement process. It's about tapping into those who may have doubts about the direction you are headed, but who, with a better understanding, will be willing to suspend disbelief and travel down a different path. When you ask someone to participate, you are implicitly asking for assistance. People don't mind being used, what they mind is being taken for granted. Be sure you identify participants based upon the scope and caliber of input you wish to glean from the process.

**Set Boundaries:** You need to establish clear expectations and limitations, and define the role and responsibilities of the participants. You need to set forth ground rules to be observed by the group. Working without such boundaries will be disastrous: a room full of well-intended citizens cannot be left to their own devices if you intend to arrive at a consensus for action in a short time. This is not a free-for-all. The setting of boundaries and establishing the tone of the process are reasons for being the initiator.

**Process Management:** You need to pay close attention to what motivates people while engaged and rally the group with ideas and information that aligns with outcomes. The community is where the proverbial rubber hits the road: unless participants find opportunity and value in your process, they will lose interest and commitment. The process needs to take into account a collaborative process that fits the culture of your community. Staying within the local context forces the group to remain acutely aware of limitations, to set reasonable expectations, and to access appropriate means for achievement.

It is essential to document the process, capturing the ideas and recommendations in reports that can be provided back to the group. These reports will help participants maintain a clear view of process, recall discussions and ensuing outcomes, and help eliminate backsliding to revisit topics already addressed.

Can engagement get out of hand? Most definitely it can, and will, count on it. Expect and accept one or more attendees wanting to monopolize the discussion; it is the facilitator's job to redirect them back to the issues at hand. This is why boundaries and engagement ground rules are so important; publish them and follow them relentlessly. A well-facilitated process will over time, and with consistency and openness, begin to self-regulate the forum where participants learn it is a more productive and inclusive when rational thinking reigns.

**The Facilitator:** Bringing the engagement process to life requires a facilitator to manage it. The facilitator gives the process needed structure. It's about knowing when to rally stakeholders around ideas, when to push the group out of a comfort zone, drawing out discussion, and knowing when you have reached conclusions.

The CEO can be the facilitator, the person best able to connect organizational issues and priorities with the participant's interests and understanding. The CEO can energize and inspire others to envision a future that requires their engagement and contribution. Your hospital depends upon your passion, desire and determination to make a difference, which will be reflected in face-to-face interaction. People need to see and feel your passion along with an openness to consider new ideas and the ability to accept critical feedback. You are seeking input without defending or promoting the work you are doing.

There can be pitfalls, however, to having the CEO serve in the facilitator role. The most glaring pitfall is the sense that the CEO will not be unbiased and objective. The facilitator must create a level playing field, where participants do not feel their input has less value or fear the repercussions of offering critical feedback. Also, the community is not necessarily prepared to have their hospital CEO challenging the status quo with a bold vision for change.

An option is to use an independent consultant as the facilitator. There is benefit to using an unbiased consultant with the talent, knowledge and expertise to craft and facilitate a mutually beneficial engagement process. A consultant has the ability to serve as a dispassionate moderator to direct the discussion. A consultant can be the provocateur, challenge preconceived notions and biases, and expound upon input to flesh out the outcomes sought. It also frees up the CEO to have the full opportunity to observe the process, overseeing its implementation from the wings and assuring the objectives of the hospital are being met, or the CEO may want to be a full participant and actively engaged in the process as the local content expert without the burden of actually facilitating the process.

**Measuring Success:** Ideally, the outcome of the process will be converting input and recommendations into the opportunity for initiatives at the community level, and rallying around this closeness of cause and kindred spirit. Once you have successfully conducted a meaningful engagement initiative, and make it an ongoing avenue, successes will build over time as the community embraces the process. Success can be measured, in part, by answering these questions:

- Do the participants find value in the process? They should see the engagement process as a meaningful way to learn about the hospital, providing an avenue for input, and for unearthing new ideas. Listen for feedback demonstrating they enjoy the process and see how their input and feedback fits into strategic thinking of the hospital.
- Is the community better equipped to stay the course in supporting a vision for the future? This is measured by assessing whether the process is moving discussion away from short-term objectives toward long-term results. You should be shifting the frame of reference from addressing problems to building a plan, together.
- Do you see an overall higher level of community interest and support? The community should be gaining confidence through the engagement process, and have a willingness to look for and accept different ways of doing things.
- Does engagement become the expectation? Once the means and opportunity is accepted, you have created a tool for incorporating more consumerism into the dialog. People see their participation as part of a legitimate process.
- Does the community more easily reach out to the hospital to initiate dialog around issues and questions? They will come to rely upon the process, valuing the objectivity of it and the collaboration it brings. The regularity of the process creates a new channel for communication.

**Conclusion:** Remember, community engagement is not about inviting people into the pilot-house. It's about messaging and creating a shared understanding. It's your chance to lay out the ongoing case for change and inspire followers. It's about creating a shared agenda, maintaining objectivity and drawing out meaningful input. A successful community engagement process will help galvanize and inspire people around new ways of doing things to achieve shared goals. Remain humble and open-minded in order to view information through a different lens, and strive to understand different perspectives and how these intersect with the objectives of your organization.

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