

# The Relational Facilitation Guidebook

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# The Relational Facilitation Guidebook

## What is the Guidebook?

- This guidebook offers an introduction to relational facilitation, a four-step implementation strategy that combines the theory of **relational coordination** with the implementation strategy of **facilitation** to assess and improve relationships and communication within and between teams to support program outcomes.

## Who is the Guidebook for?

- This guidebook is for anyone who wants to improve work processes. The ideal readers are novice to expert VA investigators, clinical staff implementing new practices, and evaluators of evidence-based practices.

## Why is the Relational Facilitation Guidebook needed?

- Teamwork is critical for providing excellent clinical care, implementing evidence-based practices, and ensuring the health and wellness of the workforce.
- Relational facilitation supports high quality relationships and communication = great teamwork!

## Be Aware:

- The guidebook is an introduction - not a comprehensive how to - of relational facilitation.
- Consultation by relational facilitation is [available](#)

## Potential Impacts:

- Relational facilitation has been shown to support VA strategic priorities by increasing patient satisfaction with care, employee productivity, and reducing staff burnout.

# Implementation Science

## Implementing evidence-based practices or complex innovations is challenging.

- On average, it takes 17 years for research findings to be put into practice and only 14% of original research will ultimately impact patient care.
- Use of evidence-based implementation strategies can speed up the adoption of research into practice.
- Common implementation strategies include:
  - Audit and feedback
  - Centralized technical assistance
  - Education and outreach
  - Facilitation

Morris, Z. S., Wooding, S., & Grant, J. (2011). The answer is 17 years, what is the question: understanding time lags in translational research. *Journal of the Royal Society of Medicine*, 104(12), 510–520. <https://doi.org/10.1258/jrsm.2011.110180>

# Implementation Facilitation

**Implementation Facilitation**: the process of working with groups to support participatory ways of doing things such as making decisions or identifying and solving problems to support implementation efforts.

- Implementation facilitation has been widely used in healthcare to support the adoption of interventions:
  - Care coordination
  - Suicide prevention
  - Pain management
- Anyone can be a facilitator - however, the ideal facilitator is someone who can empathize and understand the needs of those in the field (i.e., the ones doing the work!)
- Implementation facilitation requires strong communication processes and skills and the creation of an environment that supports interpersonal relationships based on trust and mutual respect.
- The relational aspects of implementation facilitation are often overshadowed by teams focusing on getting the work done (i.e., taking care of Veterans).
- This is where relational facilitation, which is guided by theory of relational coordination, fits in!

Further reading: The [Implementation Facilitation Training Manual](#) focuses on supporting individuals, groups, and organizations in their efforts to adopt and incorporate innovations into their practice

# Relational Coordination Background and Video

- **Relational coordination is a social network approach to improve key performance outcomes**, including quality and efficiency of work and employee well-being, particularly during times of stress.
- Relational coordination proposes that effective teamwork hinges on accurate, frequent, timely, and problem-solving communication bolstered by shared goals, shared knowledge, and mutual respect within and between team roles.



Explainer Video: An Introduction to Relational Coordination (4 min)

URL Link: [An Introduction to Relational Coordination - YouTube](#)

# Relational Facilitation Training Video

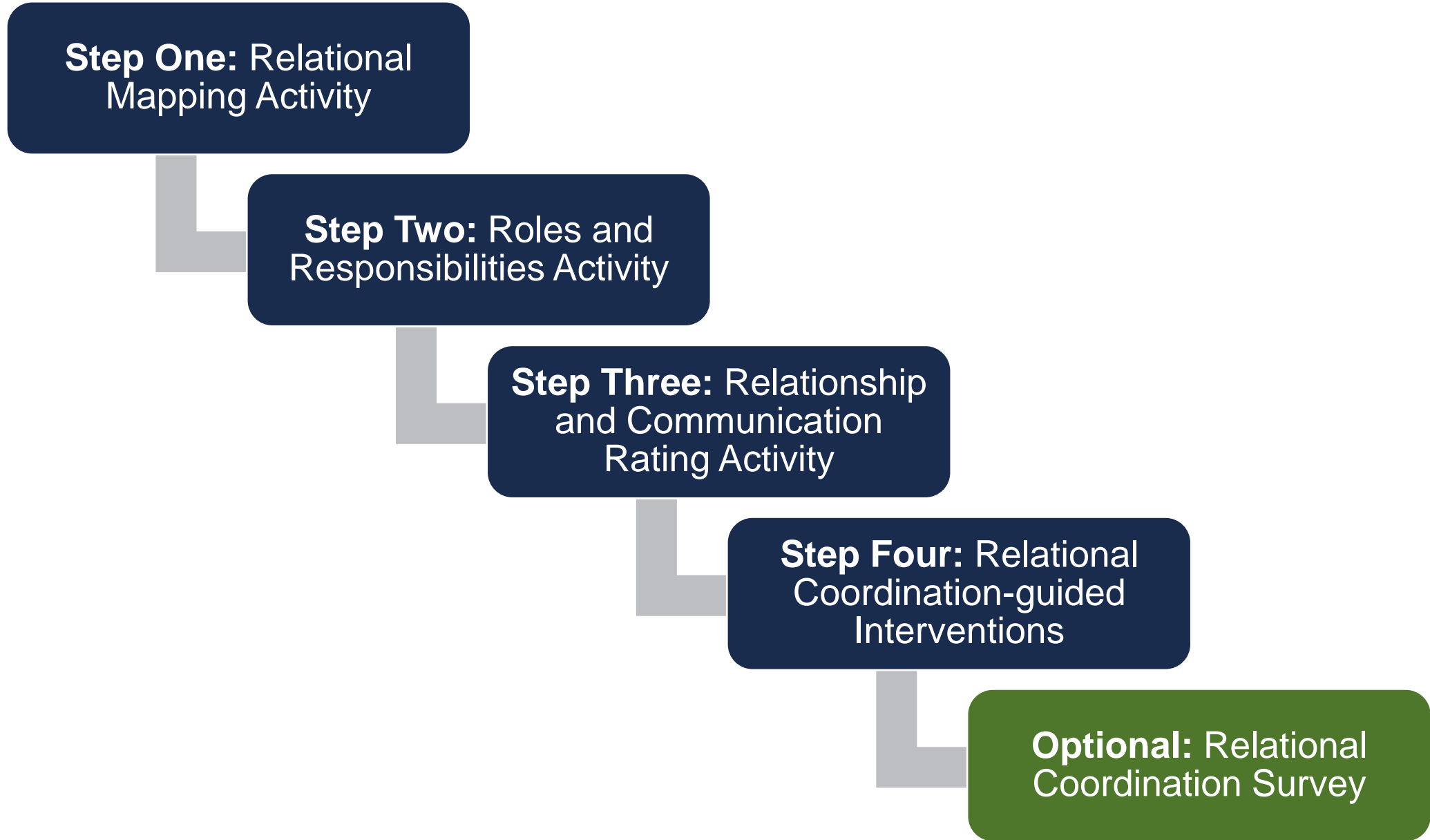


Explainer Video: Relational Facilitation for Care Coordination Programs (10 min)

URL Link: [Relational Facilitation - YouTube](#)

# Relational Facilitation Step-by-Step Guide







# Step One: Relational Mapping

*The goal of relational mapping is to identify team roles to increase awareness around who is part of a team.*

## Relational Mapping should be done with:

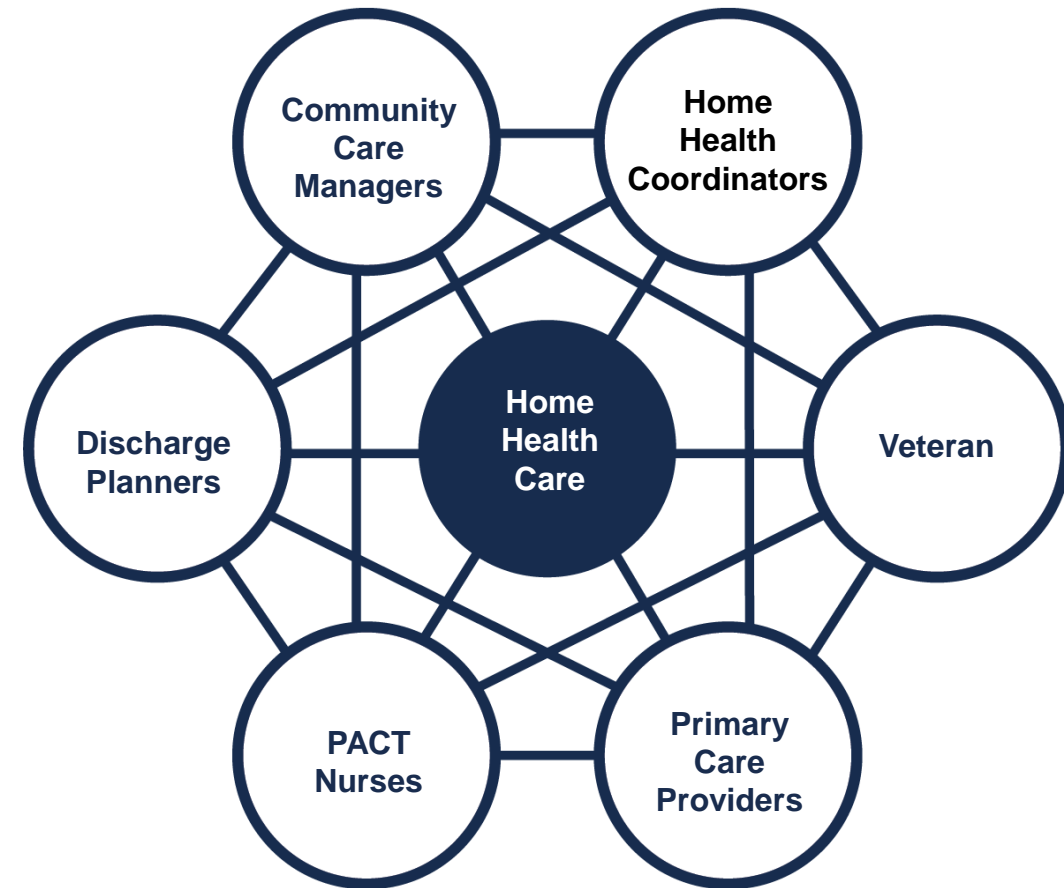
- New or existing teams introducing new staff, processes, or procedures

## Aim of Relational Mapping:

- Increase awareness of who is part of the team
- Provide a forum for team members to:
  - Identify the importance of relationships and communication between roles (e.g., PACT nurse and PCP)
  - Talk about ways to improve relationships and communication

## Who should be part of mapping exercise:

- Everyone involved in a specific work process (e.g., coordinating a Veteran's transition from hospital to home)



# Step Two: Roles and Responsibilities Activity

*The goal of asking team members to write out their responsibilities and expectations is to learn who does what on a team.*

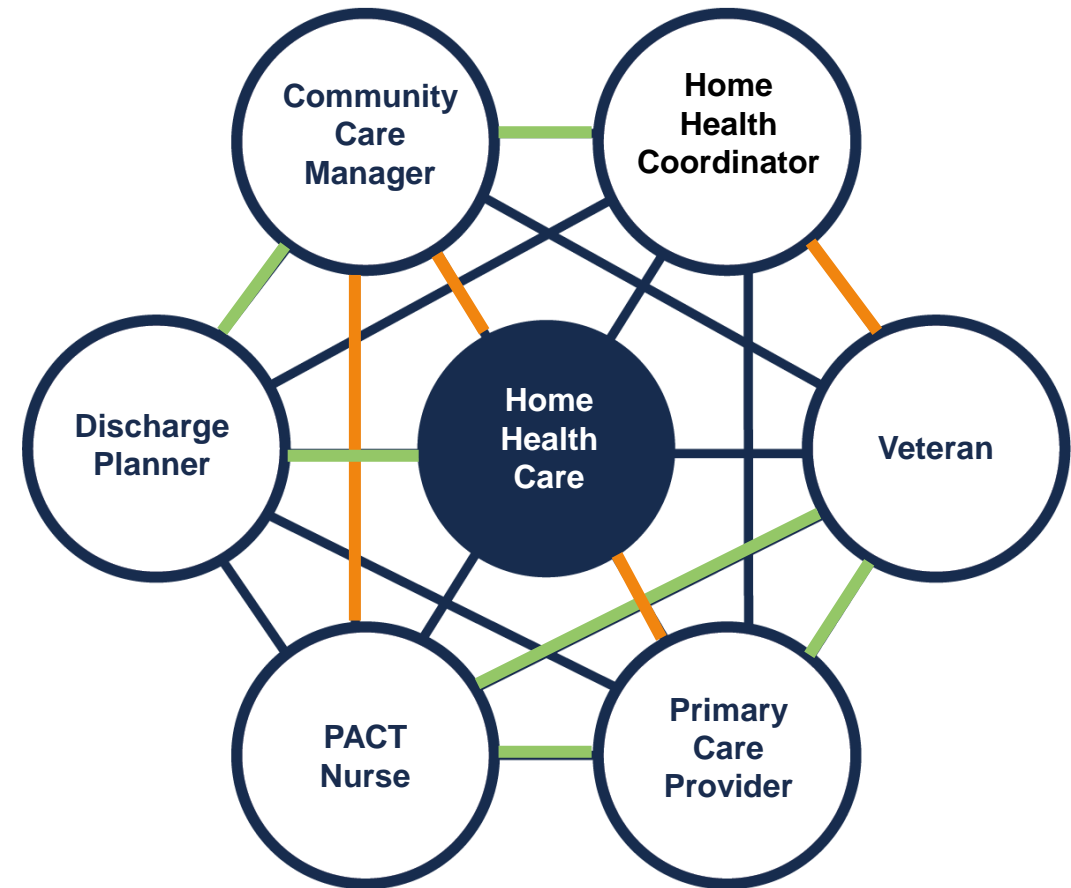
1. Ask every member of a team to write their individual responsibilities and role expectations for the work being done for (e.g., hospital to home transitions)
2. Compile the information by role and list responsibilities and expectations in a table
3. Discuss as a group and address any differences in opinions.
4. Post on the unit, keep updated if roles, responsibilities or expectations change, and share with new members as part of orientation

Role	Responsibilities	Expectations
<b>Discharge Planner</b>	<ul style="list-style-type: none"> <li>• Talk to healthcare team about discharge plans</li> <li>• Assist with coordination of out of hospital needs</li> <li>• Communicate with out of hospital partners</li> <li>• Ensure safety and social needs of patient are met prior to discharge</li> <li>• Meet with patient to discuss discharge plans</li> </ul>	<ul style="list-style-type: none"> <li>• Engage early in hospitalization</li> <li>• Attend huddles / meetings</li> <li>• Anticipate needs of team</li> <li>• Speak up if concerns observed</li> <li>• Be respectful in speech and manner</li> </ul>
<b>PACT Nurse</b>	<ul style="list-style-type: none"> <li>• Review records from hospitalization</li> <li>• Communicate via email, instant message, EHR with discharge planner as needed</li> <li>• Ensure safety and social needs of patient are met after discharge</li> <li>• Call patient post discharge</li> </ul>	<ul style="list-style-type: none"> <li>• Lead communication within PACT team</li> <li>• Be respectful in speech and manner</li> <li>• Ask for assistance if needed</li> <li>• Provide high-quality and safe care</li> </ul>

# Step Three: Relationship and Communication Rating

*The goal of this practice is to identify areas of strength in a team and areas that would benefit from targeted relationship and communication-focused interventions*

1. Gather your team (in-person or virtual).
2. Give everyone a copy of the relational map created in Step 1.
3. Ask each person to rate how strong they perceive relationships and communication within and between roles – using the [Relational Coordination Questions](#) as a guide.
  - Weak = orange
  - Moderate = blue
  - Strong = green
4. Combine the results and look for trends (i.e., mostly green lines = strong relationships and communication)
5. Discuss with the team:
  - What is going well between roles? (green lines)
    - What is happening here and are there lessons for other roles?
  - Are there role relationships that would benefit from interventions? (orange lines)



# Step Three: Relational Coordination Questions

RC Dimension	Survey Question
<b>Frequent Communication</b>	How frequently do people in these groups communicate with you about [work process]?
<b>Timely Communication</b>	How timely is their communication with you about [work process]?
<b>Accurate Communication</b>	How accurate is their communication with you about [work process]?
<b>Problem-solving Communication</b>	When there is a problem in [work process], do people in these groups blame others or try to solve the problem?
<b>Shared Goals</b>	How much do people in these groups share your goals in [work process]?
<b>Shared Knowledge</b>	How much do people in these groups know about the work you do with [work process]?
<b>Mutual Respect</b>	How much do people in these groups respect the work you do with [work process]?

# Step Four: Relational Coordination-guided Interventions

*Relational coordination-guided interventions can be integrated into the way teams work to purposely build relationships and communication processes.*

## Relational Interventions:

- Job shadowing
- Narrative/storytelling
- Visual displays in common area to track and monitor goals



## Communication Interventions:

- Newsletters
- Protected time to meet and problem-solve
- Establish team norms for effective communication patterns

## Structural Interventions:

- Shared accountability
- Shared rewards
- Boundary spanner roles
- Shared meetings/huddles
- Shared protocols
- Shared information systems

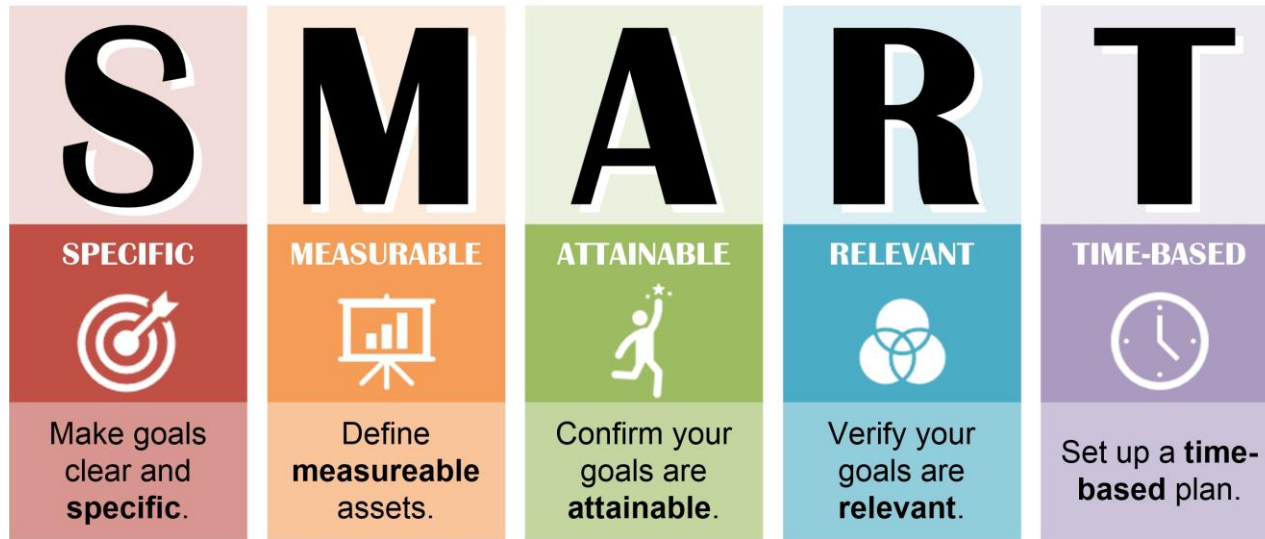


## Outcomes:

- Increased access to care
- Increased Veteran satisfaction
- Increased provider satisfaction
- Increased quality & safety

# Step Four: Small Tests of Change

*The best way to implement new relationship and communication practices within your team are to use quality improvement methods such as SMART goals and PDSA cycles.*



[SMART goal information](#)



[PDSA guidance](#)

# SMART Goals Example

**GOAL: Inform and update VA stakeholders on status of implementation program for Veterans discharged from the hospital with home healthcare via informational one-pager.**

Specific	Measurable	Attainable	Relevant	Timetable
<p>One meeting per quarter, the purpose is to make stakeholders aware of the program.</p> <p>One email per quarter, BCC everyone whom the one-pager was previously shared with; the purpose is to thank them for their help and provide updates on the program and program enrollment.</p>	<p>Document number and types of meetings the one-pager is shared at.</p> <p>Document the number of people the one-pager is emailed to.</p>	<p>Yes; requires one meeting and one email per quarter.</p> <p>Will track people contacted by “replying all” to meeting invites.</p>	<p>Addresses the Relational Coordination domain of shared knowledge.</p>	<p>Complete above tasks 1x/quarter.</p> <p>Try these strategies for at least 1 year.</p>

# Optional: Relational Coordination Survey

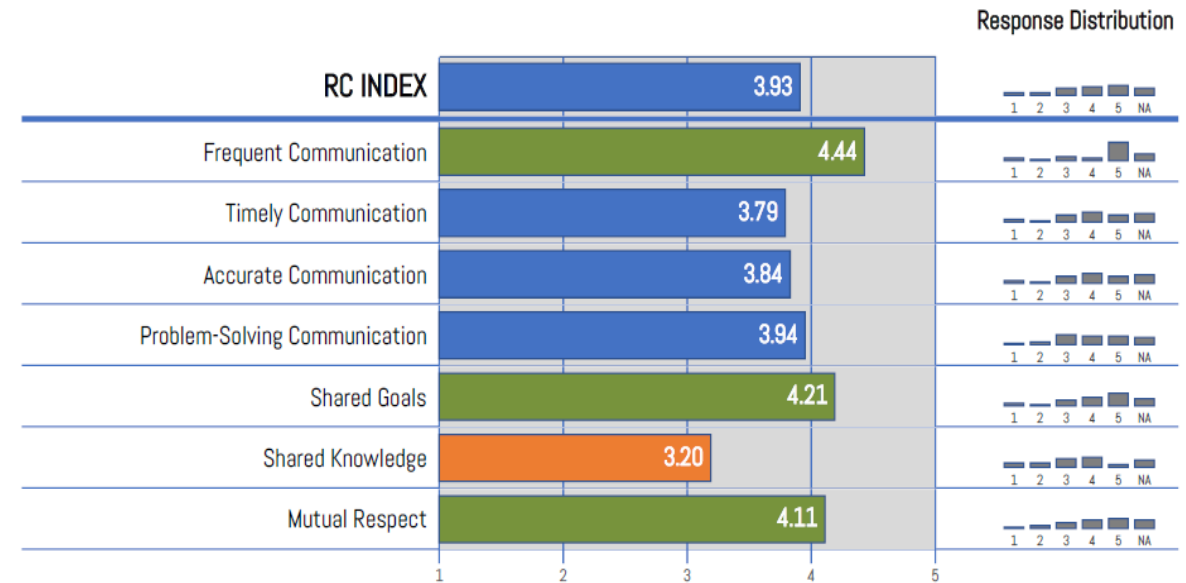
*The Relational Coordination Survey is available to facilitators to quantify the state of relationships and communication within and between teams.*

The Relational Coordination Survey is offered for a fee through the [RC Analytics platform](#).

The 7-item survey collects data to:

- ✓ Visualize and analyze the social network ties within a complex work team.
- ✓ Visualize the strength of relationships and communication within and between teams.
- ✓ Compare programs across sites and over time.
- ✓ Allow testing of hypotheses regarding the impact of relationships and communication between roles on outcomes of interest.

RC TeamScore™  
(N = 15)



To use the RC Survey without the full RC Analytics platform, purchase a license agreement [here](#).



# But wait! You're not done.

Relational facilitation isn't linear. It is important to revisit the SMART goals and PDSA cycles with your teams and integrate them into your culture.

- Add SMART goals to meeting agendas to keep them top of mind
- When a SMART goal is achieved, set the next one
- When something is working, talk about it and spread it to other teams

Revisit your relational map every 6 months:

- Assess the impact of the Relational Coordination-guided interventions
- Celebrate successes
- Identify new areas for interventions



# Benefit of using the Relational Coordination Survey

*“After facilitating groups for many years, having the Relational Coordination survey results was like getting a crystal ball and magic wand combined. No longer did we need to rely on our subjective team, but rather could return to the group their own perceptions and data.*

*What’s more, the survey helped reveal hot spots, hidden power structures, and in/out group dynamics that we sensed but didn’t know enough to name. Even if we only return the aggregate results to the group, the other layers of data will accelerate our facilitation. The categories themselves are also incredibly concrete issues from which to build conversations around process and relationships.”*

*- Consultant, RCC client*

[Relational Coordination Collaborative | The Heller School at Brandeis University](#)



# Additional Resources & Further Reading

## Relational Coordination:

[VIDEO: The Power of a Simple Idea- Jody Hoffer Gittell](#)

[VIDEO: Transforming Relationships for High Performance- Jody Hoffer Gittell](#)

[Relational Coordination Collaborative](#)

[Relational Coordination in the VA](#)

[Relational Coordination Survey- Relational Analytics](#)

[Relational Coordination Survey Questions](#)

[ARTICLE: Revisiting Relational Coordination: A Systematic Review](#)

## SMART Goals:

[TMS: Achieving SMART goals \(2-minute video\)](#)

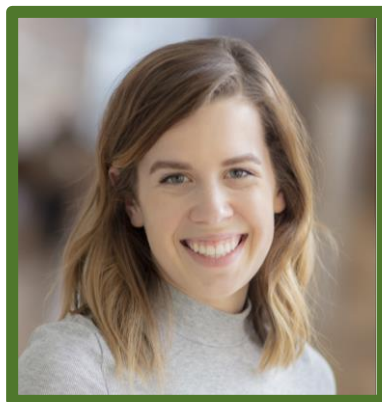
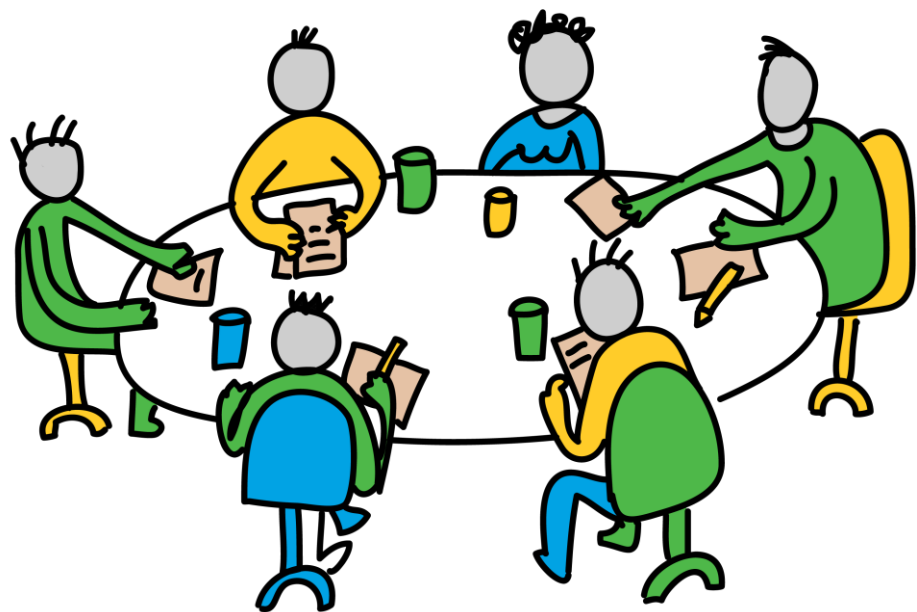
[TMS: Achieving goals \(1-hour course\)](#)

[TMS: HBR Guide to Project Management \(3.65-hour course\)](#)

[TMS: Developing Your Action Plan \(1.5-hour course\)](#)

# Meet the Team

## The Relational Facilitation team



Brigid Connelly, BA



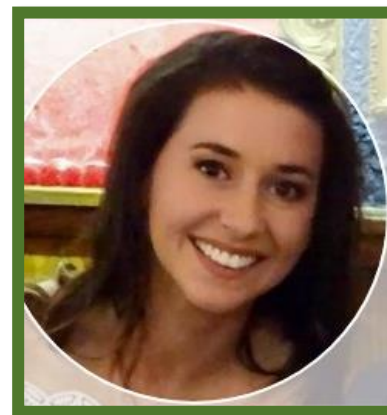
Heather Gilmartin, PhD, NP



Anne Hale, BA



Rachael Kenney, MA



Brianne Morgan, BA



Heidi Sjoberg, LCSW

- For more information or to have a Relational Facilitation consultation, visit the Relational Coordination in the VA webpage:  
<https://www.seattledenvercoin.research.va.gov/education/rc>