Our ONE UNC Health Journey

Learning Map® Experience
Facilitator Guide
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Introduction

When we know how our business works – the marketplace, the financial challenges, the strategy for winning – we can better understand the powerful impact of our own actions and accept changes as part of our company’s growth.

The more we learn about our business, the easier it is to see our role in its success. The Learning Map® process you’re about to facilitate is a very different kind of learning.

- There’s no teacher or front-of-room trainer – participants play an active role.
- There’s no textbook or wordy presentation – the focus is a visual that tells a story.
- Participants share ideas and opinions by exploring information as a group.
- It’s designed to engage people with a variety of learning styles.
- And it’s fun!

As a facilitator, you’ll help make this learning happen – and this guide will show you how.

In this facilitation overview, you’ll find:

- A description of the facilitator’s role
- The basics of the Learning Map® process
- Tips and techniques to help you facilitate effectively

Then, for each Learning Map® session, this guide provides:

- The objectives that the session is designed to address.
- A list of materials you’ll need
- The Learning Map® visual
- The dialogue questions that guide the discussion and give instructions for conducting activities
- Timing guidelines for each section
- The card exercises and any answers you’ll need to know
- Notes to help you with particular questions or exercises
The Facilitator’s Role

As a Learning Map® facilitator, you’re a guide on a learning journey. You won’t be filling the role of teacher or business expert. In fact, once the session begins, you’ll do very little talking.

Throughout the session, your main duties are to:

- Keep the group focused on the discussion
- Encourage people to participate honestly and openly
- Ask probing questions to increase understanding
- Manage the time

Elements of the Learning Map® Experience

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Visual</td>
<td>An illustrated metaphor represents business issues. With images as references, participants can speak a common “language.”</td>
</tr>
<tr>
<td>Dialogue</td>
<td>Targeted questions and prompts lead participants through the exercise. Participants learn by listening to each other and forming their own conclusions.</td>
</tr>
<tr>
<td>Card Exercises</td>
<td>Card exercises increase the interactive and collaborative nature of the experience. Cards provide further information – which keeps the discussion focused on facts rather than perceptions – or scenarios to help participants consider the impact of decisions.</td>
</tr>
<tr>
<td>Facilitation</td>
<td>By bringing all these elements together, facilitators make it possible for participants to discover the learning themselves.</td>
</tr>
<tr>
<td>Group Interaction</td>
<td>With six to ten participants, the group is big enough for a variety of ideas and small enough that everyone can take an active part.</td>
</tr>
</tbody>
</table>
Tips and Techniques for Effective Facilitation

These tips and techniques will guide you through the facilitation experience from preparation to completion.

A Few Days Before the Session

Review the materials so you’re familiar with them. This will make facilitation easier for you and more effective for the participants.

On the Day of the Session

- Prepare the workspace. Place the visual face down on the table and arrange the cards in the order in which you’ll use them. Make sure you have other materials you may need, such as pencils or nametags.

- As the participants arrive, welcome them and create a relaxed environment. Seat them in a U-shaped fashion around the visual. You should sit at the top of the U so participants have the best view.
As the Session Begins

1. Set the stage for learning. Participants should understand:
   - Why this learning activity was created
   - How long the session will last and when a break is scheduled (if applicable)
   - Ground rules – such as turning off cell phones, staying at the table during the session, and not judging others’ ideas

2. Ask participants to introduce themselves. If you think it’s necessary, conduct an icebreaker exercise to raise the comfort level.

3. Explain the process, your role as facilitator, and their role as participants. See the sample introduction on page x.

4. Ask for a volunteer to begin reading the dialogue questions aloud. When participants are directed to look at the visual, turn it face up on the table.
During the Session

1. Control the card exercises.
   Keep everyone involved by asking different volunteers to read.
   • For cards with text only: Distribute these one at a time so participants focus on the information and don’t read ahead. After participants read the cards, place the cards on the table so everyone can read them.
   • For ranking or matching exercises: Place all the cards across the visual, and let the group make more than one attempt at correctly placing the cards before revealing the answers.
   • For card exercises that require answers, the answers are shown in this guide.

2. Maintain a high energy level.
   • Add enthusiasm to the process by keeping a positive, energetic attitude. Your energy sets the tone for the rest of the group.
   • Encourage participants (who are able) to stand throughout the experience. This keeps the group’s energy high and gives participants a better view of the visual.
   • Let participants know that they may change their position around the visual during the session to get a new perspective or to improve their experience. Consider asking participants to move around between sections of the dialogue questions.

3. Be an active listener.
   Participants will offer opinions more often when they see that you, the facilitator, are paying close attention. When someone offers a relevant but brief comment, restate it to encourage the speaker to elaborate. Or ask, “Why do you think that happens?” or “What leads you to that conclusion?”

4. Keep the group focused.
   If the discussion wanders off topic, ask the reader to repeat the question, or simply remind the group about the need to stay on time.

5. Control participation in the discussion.
   Everyone should be involved in the conversation. Some people need processing time, so don’t rush or fill uncomfortable silences.

   If one participant dominates:
   • Avoid eye contact with more vocal participants
   • Assign more reading to participants who talk too much – this seems to limit the amount of talking they do after they read
   • At a break, privately explain the importance of allowing others to be involved

   Also, gently encourage participants who aren’t talking at all. “What do you think about that?” usually gets a response. Or ask the quiet participant to read a card or question. If you’re unsuccessful, don’t worry. Some people prefer not to read aloud and others prefer to learn silently. At a break, check in with the quiet person individually to see if there’s anything that could be changed to enhance their experience.

6. Remember that you’re not a teacher or participant.
   • Direct compliments to the group, not to any one participant. If you say, “Great point!” to an individual, others may feel that their ideas are not as valid.
   • If a question arises, ask participants what they think, or say, “Let’s talk about that at the end of our discussion.”
   • You may be tempted to jump into a lively discussion, but when the facilitator is giving ideas and answers, participants don’t take part in their own learning and may feel like students instead of explorers.
To Ensure an Inclusive Experience

If a Participant Is Deaf or Hard of Hearing

Whether the participant is speech-reading or using an interpreter, explain to the group that speakers should:

- Face the participant when speaking
- Talk at a steady pace and in a normal manner
- Keep objects and hands away from the face
- Repeat questions or comments that may have been missed
- If possible, make copies of the questions and card exercises for the participant
- Allow time for the participant to ask or respond to questions
- Because the participant can’t speech-read while taking notes or completing written exercises, allow a little extra time for these activities

As a facilitator:

- Allow the participant to choose their seat at the table
- Make frequent eye contact to be sure the participant feels included
- Recruit a volunteer to help the participant know where to look and what to read
- Be sure the light source comes from above, as back-lighting makes speech-reading difficult
- Give the participant as many visual cues as possible – point to images or gesture to indicate the speaker
- Repeat questions or comments that may have been missed
- If possible, make copies of the questions and card exercises for the participant
- Allow time for the participant to ask or respond to questions
- Because the participant can’t speech-read while taking notes or completing written exercises, allow a little extra time for these activities

If using an interpreter:

- Review the visual and the process with the interpreter in advance
- Allow the interpreter and deaf or hard-of-hearing participant to choose their own places at the table, and show them where you’ll be sitting

If a Participant Is Partially Sighted or Blind

As a facilitator:

- Ask the participant to arrive early so you can describe the visual
- Encourage other participants to describe images and charts in detail
- If the participant is partially sighted, enlarge cards that require writing
- Recruit a volunteer to make sure the participant understands what you’re describing and record any responses that need writing
- Encourage other participants to describe images and charts in detail
- If the participant is partially sighted, enlarge cards that require writing

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After the Session

1. **Address any concerns** that have been raised. If you don’t know the answers, ask a volunteer to investigate and report to the group, or take this on as a personal task.

2. **Thank the participants** for sharing their ideas.

3. **If applicable**, distribute takeaways and let participants know about follow-up sessions or next steps.

4. **Ask participants to help gather the materials**. Use the materials checklist to confirm that all pieces have been returned.

In Summary

**✅ Do**

- Relax and have fun
- Sit at the top of the visual so you view it upside-down
- Explain the essentials of the session
- Allow participants to share or adjust the experience based on how they prefer to participate
- Clarify your role and the group’s role
- Ask for a volunteer to read
- Keep the group focused
- Keep track of time
- Ask questions that draw out opinions
- Allow pauses in the conversation for processing time
- Make sure everyone is involved in the discussion
- Maintain a high energy level

**🚫 Don’t**

- Provide your own opinions
- Give answers that are not in this guide
- Make teacher-pupil responses, such as, “Great point!”
- Let one person control the conversation
- Read any materials yourself
- Distribute cards in advance
Overview

Session Objectives

- Ground in how the **healthcare industry is evolving**, where we stand, forces of change, and our case for change
- Clarify meaning of **ONE UNC Health** and discuss what it means for how we work together and lead change across the organization
- Introduce **Forward Together 2030** and discuss high-level connections to ONE UNC Health and our purpose
- Understand the ways our ONE UNC Health **culture** and our **values** activate our **strategy**
- Recognize the role we each play on our ONE UNC Health journey and make a tangible commitment toward championing it

List of Materials

- *Learning Map®* visual, **Our One UNC Health Journey**
- Facilitator guide (this document)
- Dialogue questions (tabletop easel)
- Card wallet containing:
  - ONE UNC Health card (1)
  - Our North Star card (1)
  - Our Evolving Strategy cards (5)
  - Strategic Priority Areas cards (4, double-sided)
  - Forces of Change cards (8)
  - Culture Definition card (1)
  - UNC Health Values Defined cards (4)
  - Cultural Shifts cards (6)
  - UNC Health for Me cards (7)
Our ONE UNC Health Journey:
Facilitator Notes

As the Session Begins

1. Set the stage for learning. Participants should understand:
   - Why this learning activity was created
   - How long the session will last and when a break is scheduled (if applicable)
   - Ground rules – such as turning off cell phones, staying at the table during the session, and not judging others’ ideas

2. Ask participants to introduce themselves. If you think it’s necessary, conduct an icebreaker exercise to raise the comfort level.

3. Explain the process, your role as facilitator, and their role as participants.

   SAY
   In our session today, we’ll engage in a unique learning experience [mention the overall purpose if desired]. There is no teacher or trainer. My role is to keep the conversation on track and on time. You’ll learn from each other and the materials, not from me. We’ll use:
   - A Learning Map® visual, which we’ll turn face up in a minute
   - Dialogue questions [hold up the tabletop easel]
   - Cards that add information or are used in activities [hold up an example]

   As participants, you’ll take turns reading the dialogue questions and cards and join in the discussion and activities.
   We’ll work as a team, helping the session run smoothly by participating, taking turns talking, respecting others’ thoughts and opinions, explaining brief comments, and keeping the conversation on track.

4. Ask for a volunteer to begin reading the dialogue questions aloud. When participants are directed to look at the visual, turn it face up on the table.
In our session today, we’ll engage in a unique learning experience. There is no teacher or trainer. My role is to keep the conversation on track and on time. You will learn from each other and the materials, not from me. We’ll use:

- A Learning Map® visual, which we will turn face up in a minute
- Dialogue questions
- Cards that add information or are used in activities

As participants, you’ll take turns reading the dialogue questions and cards and join in the discussion and activities.

We’ll work as a team, helping the session run smoothly by participating, taking turns talking, respecting others’ thoughts and opinions, explaining brief comments, and keeping the conversation on track. Who would like to volunteer to read first?
Welcome to Our ONE UNC Health Journey Learning Map® experience. Over the next 75 minutes, we’ll explore the why, what, and how of our ONE UNC Health journey, including our evolving culture and strategy. We will explore all that we can achieve for the health and well-being of North Carolina during a time of unprecedented change in healthcare.

Please stand, if you’re able, and look at the entire visual. Briefly describe what you see. Don’t worry about the details yet. We’ll discuss each scene as we go.
Facilitator Note:

**Question 1:** In case it comes up, tell the team the statement on the visual has historically been referred to as “our mission” but will be called “our purpose” moving forward.
4. Which of these stand out to you, and what would you add to this list?

5. In addition to external forces, we must also consider our **internal** environment. What internal challenges could stand in our way of responding to these **Forces of Change**?

6. Today we’ll explore our ongoing efforts to achieve our purpose, including a strategic journey and our shared culture. We call this journey “ONE UNC Health.” Read the **ONE UNC Health card** aloud.

7. What words resonate with you the most from this definition? Why?

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**Facilitator Note:**

**Question 6:** Keep out the **ONE UNC Health card** for the rest of the experience so participants can refer to it as needed.
Facilitator Note:

Question 1:

• If anyone asks about the difference between our purpose and our North Star, say that our purpose is why we do what we do every day, and our North Star is where we’re headed as an organization.

• Keep out the Our North Star card for the rest of the experience so participants can refer to it as needed.
Facilitator Note:

**Question 3:** Let the team know that there’s a lot of work being done behind the scenes to further build out our strategic plan, finalize our priorities, and examine their impact on our day-to-day work. This work will be shared with everyone in the months to come.
Facilitator Note:

**Question 6:** Once they’ve checked their answers, instruct participants to turn over the **Strategic Priority Areas cards** to their front sides again so they can refer to the details on that side for the rest of the experience.
Facilitator Note:

Question 10: Feel free to put away the Strategic Priority Areas cards and Forces of Change cards after question 10 to free up space on the visual.
1. Let's dive into our shared culture. But first, what does the term “culture” mean to you?

2. Culture can be defined in many ways. To create a common understanding for our conversation, read the Culture Definition card.

3. What words or phrases stand out to you in this definition? Why?
4. One of the first elements mentioned in the definition of culture is “shared values.” Find and read our UNC Health values shown near the sun on the visual.

5. Read each UNC Health Values Defined card and place it next to its corresponding value on the visual.

6. Our values are a key part of our culture. Given our discussion, what role should culture play in our organization and in activating our strategy?

Facilitator Note:

**Question 4:** Feel free to put away the Culture Definition card after question 4 to free up space on the visual.
7. While there is lots about our culture to be proud of, it’s important to keep evolving our mindset. Read the Cultural Shifts cards aloud.

8. Some of these shifts may apply to you and your teams more than others. Which cultural shifts do you think should be our highest priority? Which should be our lowest priority? Why?

9. Let’s put all of this into action. Think about your interactions with leaders, teammates, patients, and community members. Where have you already seen ONE UNC Health brought to life in the context of our strategy and our culture? Let’s share a few stories as a group.

Facilitator Note:

**Question 7:** If the conversation goes off track, say that the cultural shifts are not an indictment of our past or present. They’re our vision for what we should do more of moving forward.
Facilitator Notes:

**Question 1:** Note that the *UNC Health for Me cards* are numbered. Pass them out in order, starting with the overarching definition and then moving to the numbered cards.

**Question 2:** Feel free to put away the *UNC Health for Me card* after question 2 to free up space on the visual.
3. Take one last look at the visual and reflect on the conversations we had today. Which scene shows what you're most excited about as we continue our ONE UNC Health journey? Let's each share.

Thank you for your energy and leadership as we move forward on our ONE UNC Health journey together!