Option 2: Toolkit workshop plan

The second option is for those teams/organisations who want the option of using all the elements of the Toolkit in a planned sequence. It initiates a process whereby aspects of the provision of PMHC are systematically examined, and a process for specific problem-solving is established. These processes utilise the Navigation Guide to anchor your discussions and provide a pathway to work through in your problem solving; the Knowledge Bank which includes perspective essays and guides to tackling specific issues to provide you with information; and concludes by using information you have collected about your local primary mental health care issues using the Systems Planning Guide and the Dynamic Systems model to inform the choices you make.

This workshop option 2 will need you to set up a series of planned workshops beginning with problem identification and prioritising, moving through developing potential solutions, or ‘what if’ scenarios for the key problems, and then using the Systems Planning Guide and the Dynamic Systems model as a way of testing these possible solutions as a prompt for further discussion and finally decision making.

In order to get the most benefit from this, you will need a designated leader or facilitator who takes responsibility for becoming familiar with the Toolkit contents prior to any workshops.

This workshop plan is guided by the contents of the Toolkit.

Pdf copies of all the Toolkit components mentioned here can be found on the Toolkit website for easy printing.
The contents of the Toolkit are:

1. **The Navigation guide** includes principles to get maximum use from Toolkit e.g. using a consumer journey focus, making explicit the trade-offs between a population focus and an individual focus. The **Navigation Guide** includes a process outline for using the Toolkit components to develop solutions for your service issues, and some core principles you can use as anchors if your workshop seems to get ‘stuck’. The **Navigation Guide** can also be used to help you choose your entry point if you want to bypass a workshop process for problem identification and prioritising, for example, if you are a service manager and you know you must find a way to provide PMHC for children and young people. After the introductory phase of your first workshop, we suggest referring to the **Navigation Guide** to ‘ground’ your workshop discussions on the basic principles you have prioritised for this particular decision-making/planning process.

2. **The Knowledge bank** contains perspective papers on the following topics:

   - The ever present dilemma in Primary Mental Health Care
   - Quality in Primary Mental health Care
   - Specific issues in Primary Mental Health Care
   - Optimal Model II

3. **The Guides for tackling specific issues** are accompanied by vignettes of real-life decision-making from the partners and include issues such as primary/secondary care interface, service eligibility criteria, clinical leadership, and integrating with chronic care management click here to link to the guides for tackling specific issues.

5a and 5b. **The Systems Planning Guide** and the **Dynamic Systems model** is designed to help facilitate conversations about PMHC in your region, so that you can design solutions that best fit your particular circumstances. To facilitate the conversations we have designed a system model of the key elements within PMHC and how those elements link together. The model is derived from our conversations with planners and providers within the partner DHBs, and our combined knowledge
of the literature, health system design and planning, and clinical practice, and focuses on common key themes.

By working through the following six steps you will be able to define your problem and work through a solution using the components of the Toolkit.

**Step 1: Introduction**

The first step involves using the Navigation Guide to set up your discussions. It outlines some Planning Principles that will help you get maximum benefit from the Toolkit. The guide includes a process outline for using the Toolkit components to develop solutions for your planning or service issues. We suggest making yourselves familiar with the guide at the start of the workshop and then after the introductory phase of your first workshop, referring back to the Navigation Guide to ‘ground’ your workshop discussions on the basic principles you have prioritised for this particular decision-making/planning process. Included in Appendix 1 to these workshop plans is Figure 1 from the Navigation Guide of the Pathway to Mental Health Care Development. This represents the kind of process you will probably use to apply the Toolkit.

**Step 2: Define the problem**

The first part of this step is to assess existing information and identify the problem that you want to address. This is often where people struggle. They react to what they think the problem is. Instead, seek to understand more about why you think there’s a problem. The Five Ws and one H states that in order for a solution to be considered complete it must answer a checklist of six interrogative words which are: who, when, where, what, why and how. Each question should elicit factual answers which are necessary to find a solution to the problem. Importantly, none of these questions can be answered with a simple “yes” or “no”. Ask yourselves the following questions:

- What can you see that causes you to think there is a problem?
- Where is it happening?
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☐ How is it happening?
☐ With whom is it happening?
☐ Why is it happening?

Write down a five-sentence description of the problem in terms of "The following should be happening, but isn't ..." or "The following is happening and should be: ..." As much as possible, be specific in your description, including what is happening, where, how, with whom and why.

Defining complex problems:
If the problem still seems overwhelming, break it down by repeating the 5 steps until you have descriptions of several related problems.

Verifying your understanding of the problems:
It helps a great deal to verify your understanding of the problem with each other within the group.

Prioritize the problems:
If you discover that you are looking at several related problems, then prioritize which ones you should address first. Note the difference between "important" and "urgent" problems. Often, what we consider to be important problems to consider are really just urgent problems. Important problems deserve more attention. For example, if you're continually answering "urgent" phone calls, then you've probably got a more "important" problem and that's to design a system that screens and prioritizes your phone calls.

Understand your role in the problem:
Your role in the problem can greatly influence how you perceive the role of others. For example, if you're very stressed out, it'll probably look like others are, too, or, you may resort too quickly to blaming and reprimanding others. Or, if you feel guilty about your role in the problem, you may ignore the accountabilities of others.
Examples of defining the problem:

Example 1

Problem statement: Our PMHC programme is not reaching Pacific people even though many are in our target group.

1. Who in our target group is not being reached by our programme?
2. What are the reasons for this?
3. Where are the gaps between our target group and the programme and where are they occurring?
4. When?
5. Why are our Pacific People not getting access to the programme?
6. How can we ensure Pacific people are reached by our programme?

Example 2

Problem statement: Our links between primary and secondary mental health care are generally poor.

1. What evidence supports this claim?
2. What underlies each point of evidence?
3. Where are the specific deficits? E.g. do they relate to particular consultants or community teams, particular general practices, or particular groups of consumers?
4. How would we know if this problem was fixed? What would be different about the service? (You could use the consumer lens here)
5. What can we do in the short, medium and long term to resolve this problem?

Step 3: Look at potential causes of the problem

Once the problem is defined you then need to start looking at potential causes of the problem. Write down a description of the cause of the problem and in terms of what is happening, where, when, how, with whom and why.
Step 4: Identify alternatives for approaches to resolve the problem

Brainstorm for solutions to the problem. Very simply put, brainstorming is collecting as many ideas as possible, and then screening them to find the best idea. It’s critical when collecting the ideas to not pass any judgment on the ideas -- just write them down as you hear them.

Step 5: Select an approach to resolve the problem

When selecting the best approach, consider:

- Which approach is the most likely to solve the problem for the long term?
- Which approach is the most realistic to accomplish for now?
- Do you have the resources?
- Are they affordable?
- Do you have enough time to implement the approach?
- What is the nature and extent of risk associated with each alternative?

The nature of this step, in particular, in the problem solving process is why problem solving and decision making are highly integrated.

Step 6: Plan the implementation of the best alternative (this is your action plan)

Carefully consider:

“How will the situation look like when the problem is solved?”

- What steps should be taken to implement the best alternative to solving the problem? What systems or processes should be changed in your organization, for example, a new policy or procedure? Don't resort to solutions where someone is "just going to try harder".
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☐ How will you know if the steps are being followed or not? (these are your indicators of the success of your plan)

☐ What resources will you need in terms of people, money and facilities?

☐ How much time will you need to implement the solution? Write a schedule that includes the start and stop times, and when you expect to see certain indicators of success.

☐ Who will primarily be responsible for ensuring implementation of the plan?

Write down the answers to the above questions and consider this as your action plan. Communicate the plan to those who will be involved in implementing it and, at least, to your immediate supervisor. An important aspect of this step in the problem-solving process is continually observation and feedback. After the plan has been implemented it needs to be monitored and whether the problems have been resolved or not needs to be verified.

One of the best ways to verify whether a problem has been solved or not, is to resume normal operations in the organisation. Still, you should consider:

☐ What changes should be made to avoid this type of problem in the future? Consider changes to policies and procedures, training, etc.

☐ Lastly, consider "What did you learn from this problem solving?" Consider new knowledge, understanding and/or skills.

☐ Consider writing a brief memo that highlights the success of the problem solving effort, and what you learned as a result. Share it with your supervisor, peers and subordinates.
Workshop tips

1. The more people who attend, the less likely it is that you’ll reach a decision. If your workshop’s ultimate goal is to make a decision about something, have fewer than 10 people.

2. Not everyone has to stay for the entire workshop. For example if, the Clinical Director is too busy to attend the whole session, identify which sections he or she needs to be at and suggest in advance when they might want to arrive and leave. Make it clear that work will be done in their absence however. They may decide to prioritise it!

3. Where possible avoid holding your workshop after lunch when people are at their slowest and least productive time of day.

4. Figure out how to bring some excitement to your workshop. You know the areas that you want to cover, but how will you make the time rewarding and fun for your participants? Try to go for no more than 20 minutes without an activity that involves the participants such as “Share with your neighbour two ways....” Or “Jot down one way you might use ...” The idea is to get minds out of neutral and into gear to simulated discussion.

5. The key to successful workshops is to get everyone involved. If you create group exercises then make sure you keep the size of the groups small, mix up the different types of people in each group, determined how you will record and feedback ideas from each group, allow enough time for the entire group to evaluate the ideas from the smaller groups.

6. Give people a break somewhere after about and hour and fifteen minutes,

7. Great workshops are the ones that feel more like a conversation than a lecture. If you as the leader of the workshop don’t learn something from the participants about the topic, then you have not been successful.

8. End on time or even a little early.
Useful Resources

- www.mindtools.com
Appendix 1: Figure 1: Pathway to Primary Mental Health Care development

Start your planning here

What issues do you want to work on?

Don’t know/not sure

Use Workshop plans to decide which issue to tackle first

Already defined

Need to know more

See Knowledge Bank or Systems Planning Guide; or workshop to get key information

Knowledge of key issues is sufficient to make plan

Check Issues guides: ways of working together

Planning or decision making process; workshop, meeting, leader’s decision

Plan/policy ready to test

Test: Peer/stakeholder review Using System Model Real world pilot

Plan and implement

Go back to the top; What issues do you want to work on?

Problem solved. Is there another?

yes no

Whole process supported by reference to Optimal Model II; articulated core values; Toolkit Planning Principles

Quality review process