



Office of Strategic Consulting
UNIVERSITY OF WISCONSIN-MADISON

Facilitating Decision-Making Using Online Tools and Technology



Telecommuting is entirely new to many of us—a complete and sudden change in the way we work. And yet ... the **ingredients** of an effective meeting and of an effective organization remain the same.

While we need to think differently about *how* we do things in many ways, *what* we are doing is not new.

			
Microsoft Teams	Webex	Qualtrics	Box

Collaboration Tools

This presentation provides simple guidance to help you facilitate discussions and decision-making using a small suite of tools available to all UW–Madison employees (and supported by the Division of Information Technology [DoIT]).

Collaboration Tools

Meeting Facilitation



Microsoft Teams combines persistent workplace chat, video meetings, file storage, and application integration.



Webex Teams has similar functionality as that of Microsoft Teams.

Polling and File-Sharing



Qualtrics can be used to pose open-ended or multiple choice questions, take a vote, or solicit ideas.



Box is a cloud-based file management and sharing tool, useful for providing group members with relevant materials.

For help getting started with these tools and many others, see kb.wisc.edu/helpdesk/98878.



Decision-Making Tools

We tend to think of voting as the only means of making collective decisions, but there are many other options that fall along a spectrum of group engagement in the decision-making.

Spectrum of Group Engagement in Decision-Making

Increased Level of Group Involvement, Impact, Trust, and Communication Flow 

Outreach	Consult	Involve	Collaborate	Shared Leadership
<p>Communication flows from chair/director (or other department leaders) to department members, to inform</p> <p>Little to no input from department members to leadership</p> <p>Outcomes: People have the information they need to do their jobs effectively</p>	<p>Communication flows from chair/director to department stakeholders and then back, seeking input and answers</p> <p>Information or feedback from department members informs key decisions</p> <p>Outcomes: Decisions are appropriately informed</p>	<p>Communication flows both ways, in an iterated fashion; discussions on key issues take place; participatory form of communication</p> <p>Parties cooperate with each other to reach mutually acceptable decisions</p> <p>Outcomes: Increased cooperation leads to decisions owned by group</p>	<p>Communication flows both ways and is continuous</p> <p>Creates partnership on every aspect of a project from development to solution</p> <p>Outcomes: Shared ownership of projects; trust built</p>	<p>Strong bidirectional relationship between leadership and department stakeholders</p> <p>Final decision-making at department stakeholder level</p> <p>Outcomes: Broader buy-in on decisions affecting department; strong bidirectional trust built</p>

Adapted from Community Engagement Continuum, developed by the Clinical and Translational Science Awards Consortium (2011).

Information Sharing

- Use email and/or chat functions to send information out.
- Include links to files in Box or another file-sharing tool that all parties can access. (This is preferable to attachments, as the source document can be updated and recipients will see the latest version when clicking the link.)
- Don't use these tools for discussion. If those receiving information have questions or want to discuss, add the item to the agenda of an upcoming meeting.



Consultation

Consultation is:

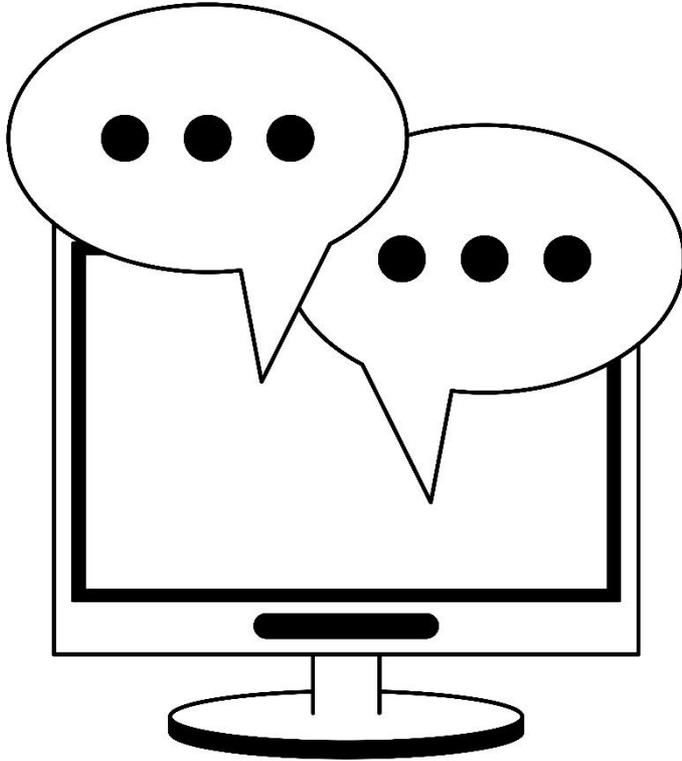
- A *formal* process of engaging group members in decision-making.
- Sometimes *required* of a decision-maker.
- Best when allowing for *robust* discussion and airing of concerns.
- Primarily focused on the opportunity for group members to inform decision-makers.



Consultation is NOT:

- Group decision-making (the designated decision-maker retains authority to make a final decision).
- Consensus.

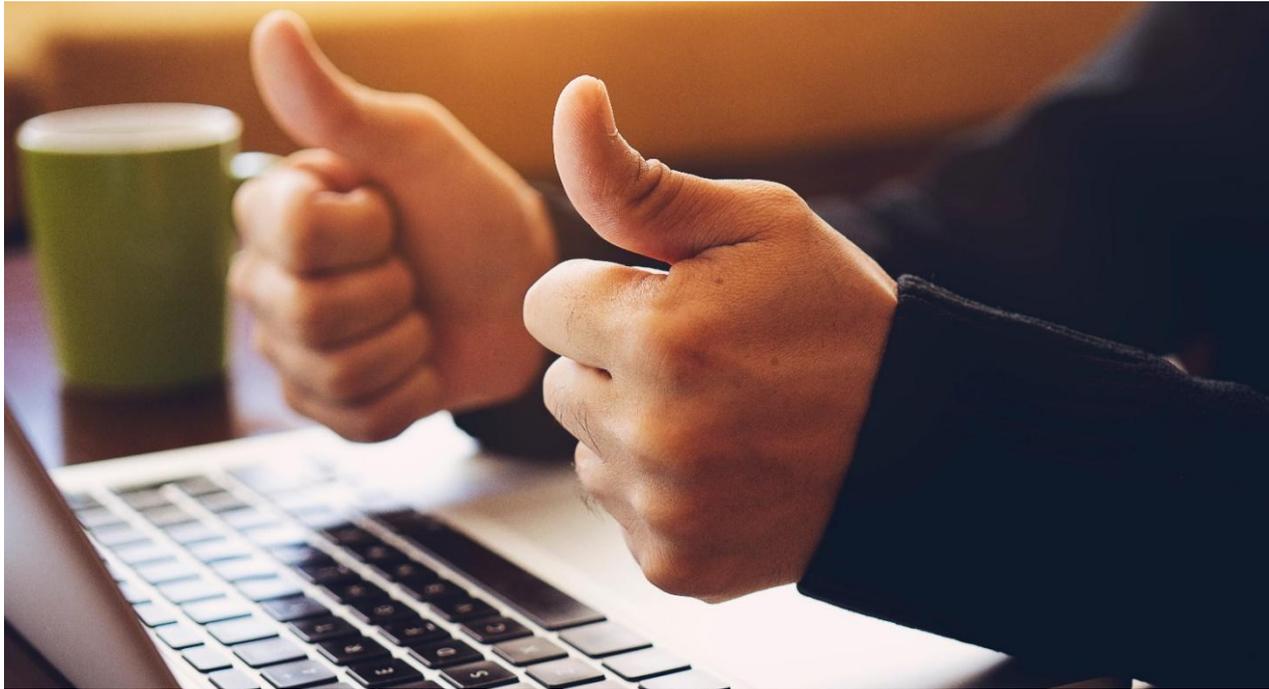
Online Consultation



New to facilitating meetings? The Office of Strategic Consulting can help. Reach out to us at strategicconsulting@osc.wisc.edu

Options include:

- Create a channel in Microsoft Teams devoted to the proposal under consideration and allow comments for a specified time period.
- Facilitate a live “town hall” in which you present a proposal and take questions.
 - Enlist the help of a facilitator to moderate questions.
 - Ask participants to “raise their hand” when they have a question, or use the chat function and ask participants to submit questions or concerns in writing.



Voting in Virtual Space

If a group is small enough, a simple “thumbs up” might suffice for registering people’s votes on a proposal. But if the group is large, this can be tricky. Here is where technology can help.

Using Technology for Voting

If voting can or should be public, you can vote within a meeting hosted in Microsoft Teams or Webex. Options include:

1. Ask participants to open the chat function and record their vote.
 - Give clear instructions so every voter knows what to write (e.g., “Enter YES if you are in favor, NO if you are opposed.”).
2. Take a roll call vote—calling on each member present to vote, in turn.
 - This takes longer, but can double as a check-in (where you can greet each person and see them on video).
3. Create a form or poll within the meeting and ask participants to respond.
 - This is particularly useful if the number of participants (voters) is very large.

Using Technology for Voting

If you need to use a more formal (or anonymous) balloting system, consider using:

1. Qualtrics – This survey software allows you to create one (or more) questions and send out a link to the survey. Voters record their votes by taking the survey.
2. There are more formal election systems (such as those used by our shared governance Secretaries for elections and other anonymous balloting). If you are facilitating voting of a formal Board or committee, you may want to consider using something like this.



Reaching Consensus

Consensus is often confused with “unanimous voting” but is distinct from voting altogether. It is *a state in which all participants in decision-making agree to move forward* with a particular proposal, even if some don’t fully agree with it. Those who don’t fully agree may be willing to set aside their concerns in order to allow the group to move forward. (Those who *block* moving forward must be addressed.)

Reaching Consensus

Three individual positions matter when you are working with a group to reach consensus:

1. I support the proposal.
2. I can live with it. (I may have concerns, but they are not serious enough for me to prevent the group from moving forward.)
3. On the basis of shared values, I object and block this proposal.

While consensus is not equivalent to voting, one can “take the pulse” of a group by treating the three options above as votes. This provides a sense of whether there is opposition and how strong it is.



Reaching Consensus

- If any group member(s) objects to the proposal, their concerns must be heard.
 - Other group members may propose modifications to the proposal to mitigate their concerns.
 - The goal is to ensure everyone can at least “live with it.”
 - Discussion continues until there are no objections strong enough to block the proposal. At this point, consensus has been reached.
- Any robust collaboration tool (Microsoft Teams, Webex, etc.) can be used to host the discussion needed to reach consensus.
- Frequent straw votes should be taken to gauge the will of the group.
- Because reaching consensus is time-consuming, there may be technology fatigue. Consensus may require a series of discussions rather than a single meeting.

Effective Meeting Tips

- Design the meeting ahead of time based on your objectives (e.g., if you will be polling participants during the meeting, create the polls beforehand).
- Decide ahead of time how decisions will be made and communicate this (e.g., Will you be voting, or aiming for consensus? Are you merely consulting on a decision that you or someone else will make?).
- Ensure that everyone has a chance to participate in discussions. Options include:
 - I want to hear only from those with concerns (or those who haven't spoken).
 - Everyone please submit concerns or questions in the chat.



Additional Resources

- Office of Strategic Consulting: Help facilitating meetings
strategicconsulting@osc.wisc.edu
- DoIT: “Technology for working remotely” (includes information on how to access Microsoft Teams, Webex, and much more):
<https://kb.wisc.edu/helpdesk/98878>
- Qualtrics:
<https://it.wisc.edu/services/surveys-qualtrics/>
- Box:
<https://it.wisc.edu/services/box/>