BUILDING TRUST

An initiative of the ABIM Foundation

Conducting a Building Trust Challenge Crowdsourcing Exercise

FACILITATOR GUIDE

Thank you for your interest in conducting a ***Building Trust Challenge*** Crowdsourcing Exercise at your organization! This is one of three ways to engage your organization and build trust. This section of the guide provides the following:

- Overview of the Crowdsourcing Exercise and how it can impact your organization's trust-building efforts.
- Detailed steps to take at your institution with a suggested timeline.
- Suggestions and materials you can use during the event.
- Best practices for facilitation.
- Sample platforms for nominal voting.
- Collateral material you can use to communicate about trust and the Crowdsourcing Exercise.
- Accompanying case study that describes lessons learned and best practices from an organization that completed a Crowdsourcing Exercise.

Overview

Over the last 25 years, there has been a sharp decrease in trust in the health care system. Trust is an essential component of all health care relationships, including the patient-physician relationship, clinician-institution relationship, and relationships between team members. The COVID-19 pandemic has shown the importance of trust in science and the harmful consequences of misinformation and disinformation in health care.

The ABIM Foundation encourages health care organizations, advocacy groups, patients, and institutions think intentionally about how to build trustworthiness as a means to improve the quality and safety of health care. This Crowdsourcing Exercise is designed to build trust between different stakeholders in health care. It has been completed by organizations and patients, faculty and trainees, and certifying boards and diplomates.

Session Objectives

1. Identify concrete actions that create trustworthiness between your organization and your desired audience.
2. Participate in an experience in which trust is used as a tool to address a problem or issue.
3. Learn about a crowdsourcing method that you may want to use regularly or in other workgroups.

In the session you'll discuss the drivers of trust and develop ideas for building trust.

- Small groups will discuss their responses to the question: **How can we build trust between our organization and our targeted audience?**
- The brainstormed ideas will be compiled, and participants will vote on the ones they think make the most impact.

Top ideas should be used as a basis for action in building trust at your organization.

Month 1: Plan

1. Identify team members to run the event.
2. Identify a pathway and resources to implement trust-building approaches.

Month 2: Prepare, Communicate & Execute

1. Recruit participants.
2. Familiarize participants with trust and your goals.
3. Set a time and place.
4. Prepare for the event.
5. Hold the event.

Month 3: Analyze & Act

1. Analyze the results for themes.
2. Communicate the results.
3. Evaluate which approaches to implement.
4. Communicate actions taken as a result of the exercise.

Building Trusting Relationships Between:

- Patients and clinicians.

- Patients and organizations.

- Clinicians working together.

- Faculty and their trainees.

- Clinicians and members of the non-clinical team.

- Clinicians and the organizations they work for.

- Employees and the organizations they work for.

- Organizations and members of the community.

- Community organizations and patients.

- Community organizations and the communities they serve.

DETAILED STEPS TO TAKE AT YOUR INSTITUTION

Plan

1. **Identify team members to run the event.** You will need a moderator, small group leaders, and technological or meeting support to run a Crowdsourcing Exercise. You may also want to engage individuals with expertise in communications, human resources, and quality improvement and/or your leadership team.
2. **Identify a pathway and resources to implement trust-building approaches.** This includes establishing selection criteria and identifying a team to decide which ideas to move forward. You will also need champions for selected activities.

Prepare, Communicate & Execute

3. **Recruit participants.** Ideally, you will hold sessions with each group of stakeholders. For example, if you are interested in building trust between your organization and front-line clinicians, you would recruit one group of leadership members and one group of front-line clinicians. These sessions should be held separately so each group can speak candidly and openly.
4. **Familiarize participants with trust and your goals.** Trust is a broad topic. It's helpful to provide pre-reading(s) or a pre-recorded video about the impact of trust on the relationship you are looking to strengthen.
5. **Set a time and place.** You should devote at least 90 minutes for this event, which can be held in person or online via meeting platforms like Zoom, Webex, or Google Teams. For a live meeting, you will need to secure a space that can accommodate a large group discussion and several small groups. You may also need easels, flip charts, and stickers.
6. **Prepare for the event. You will need to:**
   - Customize the provided slides to refresh the group on trust, provide a framework for discussion and outline the steps of the session.
   - Customize the notetaking templates provided to reflect the goals of your conversation.
   - Assign roles and responsibilities and use our template "run of show" to create a guide for staff executing the event.
   - Train small group facilitators.
   - Select a nominal voting technique and prepare the appropriate materials to vote.
7. **Hold the event.**

Analyze & Act

8. **Analyze the results for themes.** Review the approaches each group of stakeholders have prioritized for any redundancies or overlap. You may also consider prioritizing the suggestions from the audience with whom you are seeking to build trust.
9. **Communicate the results.** Share prioritized suggestions with all participants and leadership.

10. **Evaluate which approaches to implement.** The ABIM Foundation used the following set of criteria for its own Crowdsourcing Exercise:
    - What impact or value will this idea bring?
    - How feasible is it?
    - How will it build trust?
    - Will this be a low-cost, medium-cost, or high-cost endeavor?
11. **Communicate actions taken as a result of the exercise.** Exercise participants need to understand that their feedback was heard and acted upon when appropriate or feasible. Communicating that their feedback resulted in action will encourage future participation, and asking for feedback and acting on the input will build trust.

Conducting A Crowdsourcing Exercise

12. **Session Introduction:** *(This should take 10 to 15 minutes)*
    - A well-respected member of your organization should open the session. Who in your organization will help your stakeholders understand that this exercise and its results will be taken seriously? If working with trainees, you may want to engage the program director. If working within an organization, this person may be part of the C-Suite. While it is impactful to have this person introduce and end the session, you may want to consider if having this person in the room during the discussion will inhibit people from speaking freely about trust issues.
    - Someone in a neutral role should serve as an overall moderator and frame the discussion following the introduction.
    - The moderator should spell out the steps of the exercise, provide the "5 Dimensions of Building Trust" framework, and share examples of trust-building activities relevant to the discussion.
    - Before breaking into small groups, ask the participants what trust means to them in order to establish some shared language and concepts around trust.

13. **Brainstorming:** *(This should take 20 to 30 minutes)*
    - Break participants into small groups of 5 to 7 people. Each group should have an assigned note-taker and moderator. You should consider pre-planning groups to ensure a diverse set of viewpoints.
    - Moderators should initiate brief introductions if group members are unfamiliar with one another.
    - After introductions, the moderator should ask each person to offer an idea. Idea generation can be done several times in a round-robin format. It also can be done by asking people to put their thoughts in chat. If you choose to use chat, ask participants to type in their idea, but have them wait to hit enter until the moderator gives a cue. Direct participants to be succinct. This allows all participants to see the ideas cascade at once. Once people have entered an idea in chat, prompt them to elaborate or provide more detail.
    - During the first round, moderators should encourage participants to develop new ideas rather than build upon an idea they have already heard. There will be time later for more discussion on the unique ideas. Moderators should also encourage specific and actionable ideas. For example, if a participant suggests improving communications, ask them what type of communication should be

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used or how to improve existing communication.

- Remind the group to consider framing considerations (impact, feasibility, cost and impact on trust).
- If idea generation is stilted, suggest discussing "pain points" and brainstorming ways to address them. You can also have your small group take a few moments for introspective brainstorming and then ask them to enter an idea into chat or, if in-person, write an idea on a sticky note.

14. **Discussion & Consensus-Building:** *(This should take 10 to 20 minutes)*
- Provide participants an opportunity to expand, add on or clarify any of the original ideas.
- Discuss overlap of ideas or whether ideas are duplicative.
- As a small group, determine the top five ideas.

15. **Nominal Voting:** *(Nominal voting is a decision-making method that narrows an extensive list of possibilities to a smaller list of top priorities or a final selection. This should take 5 minutes.)*
- Return to the large group.
- Ask participants to share their top ideas. If there are duplicative ideas across groups, ask participants if they can be combined or eliminated.
- Test your voting techniques. If you are using technology, you may want to hold a test vote on something fun, such as your favorite dessert.
- Instruct participants to vote for their top ideas. A good rule of thumb is to allow 3-5 votes per person, depending on how many ideas are generated. Individuals should not put multiple votes on one idea. If there are several ties, you can allow additional votes.

16. **Debrief:** *(This should take 10 minutes)*
- How did it go?
- What were the highlights?
- What were the challenges?
- Clearly state what steps will be taken next and how you will communicate those steps.

Best Practices for Facilitation

- ☑ Encourage brief introductions.
- ☑ Encourage everyone to participate.
- ☑ Let the group lead.
- ☑ Endure discomfort.
- ☑ Comments and questions should be concise. You may need to kindly redirect the conversation to allow time for everyone to speak.
- ☑ Encourage participants to share their personal views rather than acting as a spokesperson for their departments, organizations, etc.

Turn-Key Materials to Help You Get Started

- Sample Invitation to participate in the Crowdsourcing Exercise
- Editable PowerPoint template to guide the Crowdsourcing Exercise
- Building Trust flyer
- 5 Dimensions of Building Trust flyer

Sample Platforms for Nominal Voting:

- **Jamboard** – This platform allows participants to put their ideas on digital sticky notes. Participants can then vote on an idea by drawing a hash mark or their initials next to the sticky note.
- **Mural** – This platform allows participants to put their ideas on digital sticky notes and vote with color-coded digital stickers. It works better for a smaller number of people.
- **Tricider** – This platform allows participants to enter approaches to a question and vote on the approaches. The platform will star your approaches with the top number of votes.
- **Upvoting** – If you have an audience response system, you can have participants enter ideas into the system and upvote ones they feel will make the most impact.
- **Physical flip charts with colored stickers** – Have groups write their ideas on a flip chart and give each participant several colored dots to vote for the approaches they'd like implemented.
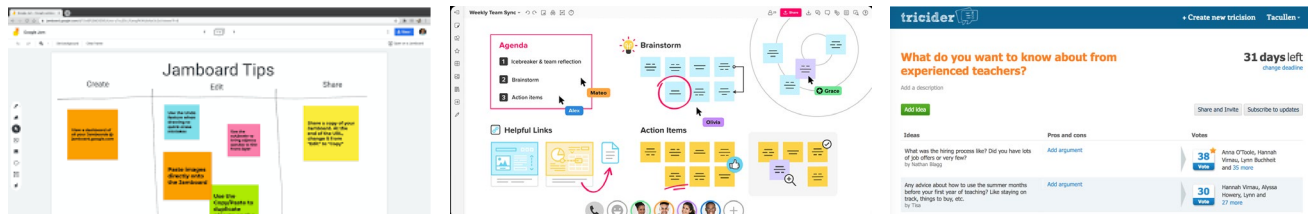
Case Study:

To learn how Wayne State University School of Medicine used the Crowdsourcing Exercise to generate trust-building activities, read **this case study**.

Technical Assistance and Dissemination:

ABIMF is willing to assist with your event. If you have further questions about using this exercise, please contact **Kelly Rand (krand@abim.org)**. We are also interested in learning from your event and sharing it with our Building Trust community.

You can edit this copy to fit your needs and reflect your organization's voice. You may choose to use all of the copy or pieces of it to craft your message.

Email subject line: You're invited! Building trust between [TARGET AUDIENCE(S)]

Dear [NAME],

Over the last 25 years, there has been a sharp decrease in trust in the U.S. health care system. Trust is an essential component of all health care relationships, including the patient-physician relationship, clinician-institution relationship, and relationships between team members. The COVID-19 pandemic has shown the importance of trust in science and the harmful consequences of misinformation and disinformation in health care.

[OPTIONAL PLACE TO INSERT ORGANIZATION SPECIFIC INFORMATION OR FEEDBACK].

You're invited to think intentionally about how to build trustworthiness as a means to improve the quality and safety of health care at [ORGANIZATION OR DEPARTMENT NAME].

In the session you'll discuss the drivers of trust and discuss responses to the question: How can we build trust between [TARGET AUDIENCE(S)]?

The brainstormed ideas will be compiled, and participants will vote on the ones they think make the most impact. The top idea will be used as a basis for action in building trust at [ORGANIZATION NAME].

Date: [SESSION DATE]
Time: [SESSION TIME/LENGTH]
Location: [LOCATION OR VIRTUAL MEETING LINK]
Facilitator: [FACILITATOR(S) NAME AND CONTACT INFORMATION]

We hope you will join us for this unique discussion.

Sincerely,
[FACILITATOR(S) NAME]