Group exercises to determine goals, priorities, and next steps

At a glance

This packet can help you facilitate two group exercises that will help attendees engage with each other to explore network goals and opportunities, identify network priorities, and create post-retreat action steps.

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- 👤 Instructions for Group Exercise 1: Explore network goals and opportunities
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Introduction

The following group exercises help attendees focus on how elder justice stakeholders can work together to prevent and respond to cases of elder financial exploitation.

- **Group Exercise 1: Explore network goals and opportunities** Working in small groups, attendees will develop a sense of current successes, challenges, and opportunities related to six themes:

  - Case review & resolution
  - Community education & outreach
  - Legal aid & victim assistance
  - Legislative & regulatory policies
  - Cross-training & resource sharing
  - Local or regional response protocols

- **Group Exercise 2: Identify network priorities and discuss next steps** Facilitators will lead attendees in a voting exercise to determine network priorities and then rate the difficulty and importance of each priority. Attendees will then use the priorities and ratings to inform a discussion about next steps.

For more information about elder fraud prevention and response networks, visit consumerfinance.gov/eldernetworks.

How to facilitate effective meetings

Make your retreat and ongoing meetings more effective with these tips and techniques

Set ground rules for communication

Consider establishing rules for respectful communication at the beginning of the meeting, such as:

- Allow only one person to speak at once

- Set time limits for comments

- Assume the best intent

- Ask questions to facilitate or improve understanding

- Respect differences of opinion

Determine how the group will make decisions

Establish a standard voting process in order to make group decision-making more productive.

THUMB VOTING

Conduct thumb voting by asking members to vote using one of these hand symbols:

- **Thumbs up** to signal they are in favor of the decision

- **Thumbs to the side** to signal that the decision is satisfactory

- **Thumbs down** to signal that they are not in favor of the decision

MAJORITY VOTING

The facilitator asks members to vote yes or no, and the majority vote becomes the decision of the group. You can vote:

- Verbally

- With a show of hands

- On slips of paper

VOTING PLUS LEADERSHIP DELIBERATION

The facilitator asks members to vote, and then network leadership takes the results, deliberates, and brings a final decision back to the group at the next meeting.

CONSIDERING "NO" VOTES

If many members vote "thumbs down" or "no" to a decision, consider asking what changes would make the decision more satisfactory and then adapting the proposed decision to reflect their feedback.

Other meeting facilitation tips

- Recruit a volunteer to act as timekeeper to help the group stay on track

- Stay focused on the purpose and topics of each meeting

- Be clear about the time available for each topic and move on if discussion becomes repetitive

- If one member is taking up a large amount of speaking time, consider interrupting them politely and speaking to them outside of the meeting to clarify their goals and interests

Supply list

The supplies we suggest here will help you run an effective network retreat.

To help minimize costs, you can get creative on supplies that meet the needs of your retreat . We recommend printing out a copy of the supply list to bring with you to the retreat.

Supplies

Sticky notes

Easel

Easel paper (self-sticking or include masking tape)

Tape

Pens for facilitator and for participants

Writing paper

Handouts or extra writing paper for participants to use during Group Exercise 1

"Voting tracker" or notepaper to tally results of Group Exercise 2

Mobile phone camera to use throughout the day (optional)

Group exercise prep

On the day of the retreat, themes will be displayed on the convening room walls for the group exercises. Write down the following six themes, each on its own sheet of easel paper:

- Case Review & Resolution
- Community Education & Outreach
- Legal Aid & Victim Assistance
- Legislative & Regulatory Policies
- Professional Cross-Training & Resource Sharing
- Local or Regional Response Protocols

Write "Parking Lot for Afterthoughts" on a piece of easel paper. On the day of the retreat, display this paper in a convenient location on a wall, for attendees to add new ideas to throughout the day.

⊖ INSTRUCTIONS

Group exercise 1: explore network goals and opportunities

This exercise will help attendees develop a sense of current successes, challenges, and opportunities for growth.

What to do

1. **Write down the six themes on easel paper, with one theme per page, and display them on the convening room walls.** Break attendees into small groups of four to eight people, making sure, if possible, that each group has a variety of stakeholder expertise. Give each group a copy of the handout (or plain writing paper). Ask each group to choose a notetaker and a spokesperson.

2. **Instruct participants to focus on this guiding question**, "How can our elder justice stakeholders work together to prevent and respond to cases of elder financial exploitation?"

3. **Review the six themes with the small groups.** Ask the groups to spend 20 minutes discussing the themes. For each theme, the groups should generate as many thoughts as possible on:

    ▪ **Successes:** things that are already working well

    ▪ **Challenges:** things that present barriers or obstacles

    ▪ **Opportunities:** things that have the potential to increase collaboration and effectiveness of the network.

    Note: If groups are still talking after 20 minutes, consider adding more time.

4. **Ask each group to share**. The spokesperson from each group should share the thoughts and ideas the group has identified, organized by theme. The notetaker should use sticky notes to add the group's insights onto the corresponding easel paper. If similar ideas are raised by multiple groups, the notetaker can group the sticky notes together on the paper.

Next steps

Collect the handouts (or writing paper) and let attendees know that their thoughts will be used to create a summary for all attendees.

Group Exercise 1: Explore network goals and opportunities

How can our elder justice stakeholders work together to prevent and respond to cases of elder financial exploitation?

1. Choose a person to take notes during group discussion. Notes will be collected afterwards for a summary that will be shared with all attendees.

2. Think about the following question with the group: how can our elder justice stakeholders work together to prevent and respond to cases of elder financial exploitation?
   For each theme, write down the group's thoughts on:

   - **Successes.** What is already working well?

   - **Challenges.** What is presenting barriers or obstacles?

   - **Opportunities.** What might increase collaboration and the effectiveness of the network?

3. Choose a spokesperson to report out to all the other groups.

Case review & resolution

➕ Successes	➖ Challenges	❗ Opportunities

Community education & outreach

➕ Successes	➖ Challenges	❗ Opportunities

Legal aid & victim assistance

⊕ Successes	⊖ Challenges	❗ Opportunities

Legislative & regulatory policies

⊕ Successes	⊖ Challenges	❗ Opportunities

Local or regional response protocols

⊕ Successes	⊖ Challenges	❗ Opportunities

Cross-training & resource sharing

⊕ Successes	⊖ Challenges	❗ Opportunities

⊗ INSTRUCTIONS

Group Exercise 2: Identify network priorities and discuss next steps

After generating ideas, attendees can collaboratively identify and rate priorities and discuss the network's next steps.

Voting and rating (15 minutes)

1. **Ask attendees to vote on their priorities. (5 minutes)**
    Each person should take three sticky notes to vote. Instruct them to place the sticky notes on up to three themes they think should be the network's top priorities. The three themes with the most votes will be the network's priorities.

2. **Rate the ease and importance of the three priorities (5 minutes)**
    This part of the exercise focuses on the three priority areas identified.

    Instruct attendees to raise their hands to vote on the relative degree of ease of each priority on a scale of one to five. Explain that "one" means the most difficult for the network to accomplish and a "five" is the easiest. For example, something might be more difficult if it requires a large amount of time, effort, or funding.

    For each priority, call out each number on the scale and count how many attendees raised their hand for each number. Count which numbers receive the most votes and select an "ease" rating from one to five based on the votes.

    After you've voted on the degree of ease of each priority, repeat the voting process for importance, with "one" being the least important and "five" being the most important.

3. **Review the ratings (5 minutes)**
    Read the ratings back to the group and note which priorities were voted the most important and the easiest to accomplish.

Discussion of next steps (10 minutes)

Discuss next steps and action items that the group identified. The priority ratings can inform this discussion. For example, the easiest priority could be addressed first, in order to build interest and enthusiasm for the network. Note that during the next meeting, attendees can form working groups focused on each of the identified priorities.

Remind attendees to write additional thoughts on the sticky notes provided and stick them in the "Parking Lot for Afterthoughts."

Group Exercise 2: Voting tracker

1. Count the total number of sticky note votes for each theme.

THEME	TOTAL VOTES
Case review & resolution	
Community education & outreach	
Legal aid & victim assistance	
Legislative & regulatory policies	
Local or regional response protocols	
Professional cross-training & resource sharing	

2. Ask attendees to rate the importance and ease of each priority on a scale of one to five. Tally how many people chose each rating level for each priority. Give each priority a rating based on the average.

THEME		1	2	3	4	5	RATING
Case review & resolution	Importance						
	Ease						
Community education & outreach	Importance						
	Ease						
Legal aid & victim assistance	Importance						
	Ease						
Legislative & regulatory policies	Importance						
	Ease						
Local or regional response protocols	Importance						
	Ease						
Cross-training & resource sharing	Importance						
	Ease						

3. **Use this graph to plot the importance and ease ratings of your priorities (optional).** The gray area indicates the priorities that were rated most important and easiest to accomplish.

EASE

5

4

3

2

1

1   2   3   4   5

IMPORTANCE