Meetings Reflections

Think about 1-2 meetings you regularly lead or participate in.

Note quick first thoughts about components described in the left hand column.

Objectives

1. Appreciate why meetings are like dinosaurs
2. Discuss important basics that promote effectiveness
3. Select and apply basics that may help you

Challenges you reported:

• Keeping to agenda / staying on task (many)
• Getting to tangible action plan (many)
• Multiple conflicting agendas
• Running large group meetings where individuals must come to agreement
• Poor buy-in from other committee members
• Scheduling/time constraints and location of participants

?????

How are meetings like dinosaurs?
But first, Preparation. Purpose(s)

Why hold a meeting?
What goals are accomplished?
Why do people come? Why do you attend?

But first ask: Is a meeting needed?

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Need to meet?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give information / get input</td>
<td></td>
</tr>
<tr>
<td>Work on group task or problem / understand an issue</td>
<td></td>
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<tr>
<td>Build/maintain team, affiliation</td>
<td></td>
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<tr>
<td>Network</td>
<td></td>
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<tr>
<td>Reassure the leader</td>
<td></td>
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<tr>
<td>Satisfy requirements</td>
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<tr>
<td>Tradition?</td>
<td></td>
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</tbody>
</table>

Can some goals be met in other ways?

If yes, who should be there?

Those affected by problem or decision
– influences quality of the outcome

Those with needed:
• knowledge, information
• resources
• talents, perspectives
• authority/influence

Are the right people there at the right time?

Preparation, Planning

Logistics
• Meeting time, locale, space; calendar invites

Agenda
• “Road map”
• What, who, how, for how long?
• Distributed in advance, with input
• Helps members answer: “Why attend; what can I give, gain?”

Example Agenda

<table>
<thead>
<tr>
<th>Agenda Item / Leader</th>
<th>Time/Activity/Preparation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How can we integrate more teaching time into our clinical service? (vs. “Clinical Teaching”) Leader: Haruka</td>
<td>T: 15 minutes A: Discuss what is / is not working, generate ideas</td>
</tr>
<tr>
<td>2. Follow up from last time: Which QI project ideas best fit our criteria? Leader: Pat</td>
<td>T: 10 minutes A: Come to a decision Preparation: Read attached subcommittee work</td>
</tr>
</tbody>
</table>

Consider framing agenda items as questions: can help focus discussion and invite thinking.
Example Agenda (continued)

<table>
<thead>
<tr>
<th>Item:</th>
<th>Incentive Plan Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader:</td>
<td>Jamie</td>
</tr>
<tr>
<td>T:</td>
<td>5 minutes</td>
</tr>
<tr>
<td>A:</td>
<td>Listen, Q&amp;A</td>
</tr>
</tbody>
</table>

Summary and Closing:
- What are our agreed upon decisions and next steps?
- Anything to improve meeting for next time?
- Leader: Haruka
- T: 5 minutes
- A: Summarize, review mtg, gather any final input, say thank you

Beginnings
- Start on time
- Welcome, introduce, appreciate
- Identify key and other desired roles
- Review purpose(s), agenda
- Review / add to Ground Rules

Key Roles

Facilitator:
- Is process-focused
- May or may not be convener
- Likes to shares

Note-taker:
- Documents discussion, decision and action items, checks for accuracy, summarizes

Time-keeper:
- Tracks time and keeps group informed

Template helps guide, record meeting

Example 1: (Adapted from HBR)

<table>
<thead>
<tr>
<th>Item</th>
<th>Leader</th>
<th>Allotted Time</th>
<th>Activity</th>
<th>Major Discussion Points</th>
<th>Decision/Outcome</th>
<th>Next steps / Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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</tbody>
</table>

Example 2: (Adapted from CHP Res Pgm)

Examples of Ground Rules

- Watch “air time” (“take space, make space”)
- Different perspectives are valuable
- Say it simply
- WAIT (Why Am I Talking?)

What do/ might you use?
Parking Lot

<table>
<thead>
<tr>
<th>What</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need more readable patient educational materials</td>
<td>Send to committee</td>
</tr>
<tr>
<td>Anticipated staff shortage</td>
<td>Add to next agenda</td>
</tr>
<tr>
<td>Change EMR section</td>
<td>Subgroup work on an report</td>
</tr>
</tbody>
</table>

- Post on flip chart? Integrate in meeting notes?
- Include action steps
- Review at end of meeting (some will drop off)
- Be sure to address: maintains its value and your credibility.

Middles: Process → Progress

- Use your tools
- Your timekeeper & note-taker can help
- Summarize as you go
- Use humor
- Be flexible
- Some off-task is OK

What to say or do if:

- Someone talks too much; interrupts
- Group gets off task
- Someone is quiet
- Someone repeats same thing over and over
- Someone tries to bulldoze a particular decision
- Nobody seems engaged
- Other things you deal with?

Endings

- Schedule and protect time in agenda
- Review decisions, next steps
- Ask what worked/what to change
- Give thanks, recognition, appreciation
- End on time or early (bang, not whimper)

Helps set agenda for next meeting

Summary

- Basics can help prevent or minimize many challenges
- Think about the whole dinosaur
- And remember,
  “The single biggest problem in communication is the illusion that it has taken place.”

Practical Resource

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Department of Pediatrics Faculty Development
Website: chp.edu/facultydev

Professional Development/Career Advancement
Educator Development
Faculty Promotion

Upcoming Sessions:

Aug 11  Negotiating Skills Every Faculty Member Needs Part 1
Jennifer Woodward, PhD

Aug 18  Making the Most of Mentoring for Career Success
Erika Friehling, MD

Aug 25  When Communication Breaks Down: Practical Strategies for Resolving Conflict
Aimee Biller, MD

Sept 1  Negotiating Skills Every Faculty Member Needs Part 2
Jennifer Woodward, PhD

Closing

• 1-2 things you learned and may try as a result of this session

• Evaluations and CME

• Thank you!