

APPENDIX 6 (QIIP, 2009)

Module 4: Making the Most of Meetings

For some FHTs, organizing meetings is a new activity. Meetings are sometimes avoided, seeing as they are seen as being a waste of time or distracting from the real purpose of the FHT (providing clinical care). There is no doubt that poorly planned or run meetings can be frustrating and feed into negative stereotypes about the role that meetings play.

Meetings are essential to smooth team functioning, often providing the glue that holds the team together. Meetings can serve many purposes, in addition to bringing together individuals who may have little other contact during the working week.

Reasons why you might have meetings include:

- Exchanging information;
- Solving problems;
- Planning patient care;
- Planning for the FHT;
- Providing support;
- Education for team members;
- Creating team norms;
- Developing or ratifying policies.

Ideally meetings should be as brief as necessary, well-prepared, run efficiently, and held only as often as is required. The frequency of meetings can be increased or decreased at any time according to the task.

Meetings need to be reframed as central to establishing high performing teams in FHTs and supported by the FHT leadership. In many FHTs meetings are the only way that teams learn about each other's day-to-day work and understand each other's perspective and roles. For many staff, meetings are also part of their professional development and skill building where they can share new ideas, strategies and information. Finding time for meetings is a challenge and as FHTs grow, meeting the needs and schedules of everyone to be connected can also be difficult:

APPENDIX 6

Structuring Team Meetings

A key principle for effective team meetings is “structure.” This refers to how the meeting is organized and conducted. Structure should encourage more efficient and effective meetings.

The key elements of a structured meeting include (Hyer et al. 2003):

- Agenda (what do we expect to accomplish?);
- Estimated timeline for completing agenda (reasonable time frames);
- Establishment of roles at meeting; members can and should rotate the following roles but every meeting should include:
 - Leader (calls meeting to order, has agenda, sets expectations);
 - Timekeeper (keeps group on task)
 - Recorder (keeps track of agreements about the care plan and modifications, and is responsible for recording changes to care plan);
- Summary of agreements (recorder reports agreements);
- Evaluation/reflection on team process (both team process and outcome of the meeting are discussed).

The Seven-Step Meeting Process (Handbook for Improvement, 1997)

These seven steps may help you standardize the method you use to conduct a meeting, and assist you in the effective execution of critical meeting tasks. Using this process may also help your team review and assess their efficiency and productivity.

Step 1 Clarify Objectives

Ensure that all understand and are in agreement with the meeting objectives.

Step 2 Review Roles

Review who will be timekeeper, recorder, leader, and facilitator. Decide at what intervals feedback on time will be given.

Step 3 Review Agenda

Review details of agenda items listed under step 4. Ensure that all team members understand and are in agreement with the agenda items.

Step 4 Work Through Agenda Items

APPENDIX 6

- Step 5 Review Meeting Record**
Review the notes taken during the meeting. Look for action items and ensure someone is identified as being responsible for this action.
- Step 6 Plan Next Steps and Next Meeting Agenda**
Decide who will do what before the next meeting. Decide what the objectives and agenda items will be for the next meeting.
- Step 7 Evaluate Meeting**
What did the team do well that it should continue doing?
What could the team do differently to improve the meeting, group, and continual improvement processes?

Roles During Team Meetings

Managing the team meeting process is important. The team leader, coordinator or facilitator is responsible for moving the team efficiently through the process of the team meeting. Some teams rotate this leadership responsibility to foster shared leadership. Other roles include the 'timekeeper' and 'recorder.' These roles can sometimes be filled by the same individuals. See the table below for a description.

Role	Responsibilities
Team leader, coordinator/facilitator	<ul style="list-style-type: none">• Schedules, arranges, and conducts the meeting• Prepares and distributes agenda before the meeting and ensures that agenda is followed during the meeting• Clarifies purpose and helps the team identify goals• Encourages everyone to participate throughout the discussion• Summarizes and organizes the ideas discussed to gain commitment• Identifies common topics or subjects in discussion to maintain direction of discussion• Asks questions to clarify comments and restates if members are confused• Encourages team to finish each agenda item before moving on to the next• Encourages the integration of new members.

APPENDIX 6

Timekeeper	<ul style="list-style-type: none">• Informing the group of the beginning time and ending time, allowing enough time for the members to begin and come to an end to the discussion;• Indicating when the group is using more time than available on one issue and remind them of the number of tasks and time remaining; and• Helping the team use its time on issues on which the whole team is needed.
Recorder	<ul style="list-style-type: none">• Documenting the efforts of the group, including summaries of decisions, action items (or assigned tasks), and deadlines;• Maintaining the group's focus and direction;• Actively clarifying the group's progress by using strategies such as summarizing and seeking;• Producing written summaries.

Techniques for Facilitating a Meeting

Consider using the following techniques in leading/guiding the discussion when you facilitate your next meeting:

Facilitator Roles	Dialogue Examples
1. Get the meeting started.	"Today we need to review__ patients. Are there any urgent concerns?"
2. Encourage communication and involvement of all members.	"What are the rehabilitation needs you see?"
3. Ask team members for opinions and feelings to encourage discussion.	"What is your view of the family's request?"
4. Ask for a summary of the discussion.	"What are the care plan goals we have agreed upon? Can someone summarize?"
5. Paraphrase what someone has said to help members understand each other.	"Are you saying that we need more information on liver function?"

APPENDIX 6

6. Ask for specific examples to improve understanding.	"Please give some examples."
7. Clarify assumptions.	"Your recommendation assumes that the patient is too confused to make an independent decision."
8. Ask for explanation in order to eliminate confusion and repetition.	"We keep avoiding a plan for this. Can someone suggest how we should proceed?"
9. Probe an idea in greater depth.	"What are other ways to help Mrs. S stay at home?"
10. Suggest a break or rest.	"Let's take a brief break."
11. Move the team toward an action.	"What should we do first?"

Please refer to Module 4 of **Part B** for a series of exercises and activities addressing the themes just discussed. Activities include:

- 4.1: Reviewing Current Meetings*
- 4.2: Evaluating Team Meetings*
- 4.3: Meeting Effectiveness*

APPENDIX 6