APPENDIX A: MEETING MANAGEMENT TECHNIQUES

ADDITIONAL RESOURCES:

About this Appendix
Much of the QI Team’s work is accomplished in meetings. Meeting skills (or lack of them) determine how well the team will be able to perform. Team members may have to learn how to work together and acquire the skills necessary to make meetings productive. With practice, meeting management techniques can become a natural part of every meeting. When meetings are well-managed, you may be surprised how productive and enjoyable they can be.

“Meeting management techniques provide teams with structure and ensure efficient meetings.”

The methods include basic rules for everyone to follow and specific tasks to be conducted before and during your meetings.

1. Develop and follow ground rules
Ground rules are explicit agreements about how a team will work together, divide responsibilities, and behave as individuals. Setting ground rules is a process of consciously choosing what the team’s accepted standards will be. As the team works together, all members are encouraged to intervene in the team’s process if a ground rule is broken. Examples of ground rules are:
   • Attendance at meetings
   • Promptness at meetings
   • Active participation in meetings
   • Agreed upon conflict management method
   • Agreed upon decision-making method
   • Cell phones on silent
   • Rotation of meeting duties (scribe and timekeeper)
   • Respect for all comments and opinions
   • Agreed process for communicating back to constituents

2. Use timed agendas
Every meeting should have an agenda listing topics to be discussed and anticipated time periods for each item. Agenda items may have been drafted at the previous meeting. Assignment of realistic times to each agenda item helps keep the meeting focused and on track. The timed agenda should be distributed to team members prior to the meeting. Review the agenda and time frames at the start of the meeting, making adjustments where the team feels they are needed.
3. Practice effective discussion skills

Part of the Facilitator’s role is to model effective discussion skills. Discussions will be more effective if all team members also use those skills. Another important duty for the Facilitator is to provide feedback to encourage active participation and help the team hone their listening skills.

The following are steps for leading more effective discussions:

- Introduce the agenda for the meeting including topics to be discussed, any relevant background and the purpose of the discussion. It is important to clarify if the group is expected to make a decision.
- Facilitate the discussion by actively listening, clarifying, and summarizing as you go
- Encourage participation by all team members
- Invite expression of various points of view
- Steer digressions back to the topic
- Keep the group on task and on time
- Conclude the discussion by summarizing the key points and decisions
- Test for consensus agreement about your conclusions
- Offer feedback about the discussion process

4. Use visual aids during the meeting

Display any relevant information by using handouts, flip charts, erasable boards, Power Point presentations, etc. When a group is working with multiple ideas or issues, having the words visible to everyone facilitates the group’s involvement and helps ensure a common understanding.

5. Follow a structured meeting process

This defined meeting process provides a structure and method for conducting meetings and assists in the effective execution of critical meeting tasks.

- Review the minutes of the last meeting. Note what was accomplished and what tasks were assigned.
- Clarify meeting objectives. Even routine meetings should have specific objectives each time. When planning a meeting, make sure the objectives justify the time and effort needed to bring everyone together. Determine if the work requires a face-to-face meeting or can be accomplished using a virtual meeting. Also consider if everyone is required for each meeting – if the agenda is specific to the work of a few people, the rest of the team may be excused.
- Review meeting responsibilities. Review who will be the timekeeper and the scribe. Many teams will decide to rotate these duties so be sure there is someone who will agree to do each task at each meeting.
- Review the agenda. At the beginning of the meeting, the team leader should review the agenda along with estimated times. Changes to the agenda can be made by team consensus as time allows.
- Work through the agenda items. In discussions, encourage diverse points of view. The Team Leader should keep the team focused and moving. Before working on any agenda item, the Team Leader should express the specific goals of the discussion and what process will be used to achieve them. The Facilitator should periodically summarize and clarify ideas and decisions throughout the meeting.
- Review the records. Have the scribe record in a visible manner – either on a projected laptop or a flip chart on an easel. This allows the team to edit and ensure everything is captured. All main discussion points, decisions, plans, and task assignments should be included. Summarize the records at the end of the meeting to ensure it is clear, concise, and accurate. From this, create a workplan listing tasks and deadlines.
- Plan the next steps. Identify tentative agenda items for your next meeting.
- Evaluate the meeting. Have all members participate in a brief evaluation. Base the evaluation on the meeting objectives, ground rules followed and/or other elements of the meeting process. Ask what worked, what didn’t work, and how the meeting process can be improved.
6. Keep records of team activities

One of the crucial elements of successful team management is keeping good records in order to:

- Document lengthy and complex activities - improvements can take 6-12 months to implement
- Communicate the team's progress to others
- Help orient new team members
- Track your steps for future replication or problem-solving
- Promote improvement efforts internally for educating and winning the support of staff and patients
- Publicize your activities at conferences and professional meetings and in publications

The Team Leader is responsible for maintaining a file of all team records. We recommend keeping a permanent record of each meeting, noting all important information given, actions taken and decisions made.

At a minimum, the Team Leader's file should contain:

- A roster of current and former team members
- Team meeting agendas, minutes, and other meeting records
- Opportunity statement
- The team's current Aim statement
- Cardiovascular disease care guidelines adopted by the entire clinical practice
- Workplans showing task assignments and timelines
- The data collection plan and any raw data collected
- Flowcharts, tables, graphs and other displays of information

For the benefit of future improvements, it is helpful to also document:

- Any evaluations of the effectiveness of the processes and tools used
- Problems encountered and their solutions
- New ideas and innovations
- Communications created describing the project