Primary Care Practice Facilitation Curriculum

Module 22: Running Effective Meetings and Creating Capacity for Practices to Run Effective Meetings

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Module 22. Running Effective Meetings and Creating Capacity for Practices to Run Effective Meetings

Activity for learners (45 minutes)
1. Ask learners to divide into groups of two or three.
2. Assign roles: practice facilitator (PF), practice members.
3. Have PF introduce and deliver training on effective meetings.
4. Ask other members of small groups to provide feedback to PF on the presentation: What was most effective? Recommendations for improving presentation if delivering to a practice?
5. Switch roles.
6. Have new PF introduce and deliver training to small groups.
7. Ask other members of small groups to provide feedback to PF on the presentation: What was most effective? Recommendations for improving presentation if delivering to a practice?

Large group discussion. Ask questions and explore answers with learners. (15 minutes)
1. Based on what you learned from this exercise and the module, what would you do differently with the meeting if you had a chance to do it over again?
2. What are three lessons you learned from this exercise that you would use with your practices?
3. The training you just completed is a type of meeting. What messages would this meeting send to the participants about the organizational culture? How would these messages support or impede formation of a culture of quality improvement in a practice?

Module 22.

$\mathbf{M}$eetings are one of the primary tools that you, as a practice facilitator (PF), will use to help practices improve. Meetings are not only important for organizing improvement work but also can be used to change a practice's culture. During your work with a practice, you will participate in numerous meetings convened by the practice, by you, or by your program. These meetings can be one-on-one or with a group. They can take place in person, virtually, or a combination.

The types of meetings that PFs commonly participate in include:

- Kick-off meetings to start facilitation work at the practice (see Module 19 on Kick-off meetings)
- Quality improvement team meetings
- Meetings with practice leadership (and, in some instances, system leadership)
- Meetings with practice managers
- Whole-practice meetings
- Meetings to review performance data
- Meetings to plan and manage the Plan Do Study Act (PDSA) improvement process (for example, PDSA "huddles")
- Meetings to gather information
- Meetings to train practice members in a new skill

This module provides basic information on running effective meetings. It also describes how meetings can be used to introduce changes into practice culture. In addition, it provides resources you can use to train your practices on these topics.

Meetings as a Tool for Changing Culture

"The structure, aliveness, deadness, whisper or shout of a meeting teaches and persuades us more about the culture of our workplace than all the speeches about core values and the new culture we are striving for … What we call meetings are critical cultural passages that create an opportunity for engagement or disengagement."

—Axelrod, 2010

Meetings serve many functions. They provide a space for planning and managing the progress of a project. They offer a forum for identifying and solving problems. They can create a space to celebrate progress. They provide a way for building relationships among staff. They are a means of sharing information and communicating with others.

Meetings are also a powerful tool for defining or transforming organizational culture. A meeting leader can set the stage for teamwork beginning with the invitation list—such as, by engaging diverse members of the practice, including office staff, medical assistants, clinicians, and practice staff in discussions about the practice—and by introducing the habit of repeatedly

asking members to reflect on how specific changes, actions, and ideas might affect patient experience (Axelrod, 2010). Meetings can also be used to signal a partnership with patients by including selected patient representatives as partners in the discussions.

In your work as a PF, meetings are a primary tool for supporting change and building capacity in a practice. You can use them for many purposes, including to:

- Keep the ball moving on improvement interventions.
- Facilitate discussion among practice members about their strengths and weaknesses.
- Review performance information and define goals and design changes.
- Train staff in new skills.
- Build teamwork and buy-in.
- Model effective meeting management for practice staff.
- Change organizational culture, in partnership with practice leaders and others.

Appendix 22A includes resources for training practice staff and leadership in an approach to meetings that can be used to promote a quality culture. The approach is grounded in theories of adaptive leadership and organizations as self-organizing systems. It encourages individuals to connect and adopt a spirit of inclusiveness and curiosity in planning, problem solving, and exchanging information. This approach to meetings can help strengthen relationships and teamwork among diverse staff and introduce a set of processes and norms that can support organizations in implementing complex changes (Suchman, et al., 2011).

Purposes of Meetings

There are four primary purposes for meetings. Understanding where each meeting you hold fits within this typology can help you set appropriate goals for a meeting and its content and methods (Bens, 2012). The four types of meetings are:

- *Information sharing.* During information-sharing meetings, groups get together to give updates, share research, and brainstorm for new ideas. Typically, no decisions are made in an information-sharing meeting.
- *Planning.* Planning meetings involve taking ideas to the next step. Participants can collaborate on goals, visions, priorities, and needs, and define next steps.
- *Problem-solving.* During problem-solving meetings, teams collaborate on developing solutions to problems within the practice. Participants gather data, identify problems, analyze the situation, and plan for action.
- *Relationship building.* This type of meeting serves as a time for people to get to know and build relationships with one another.

Empowerment of Participants

As a PF, it is important to figure out the level of empowerment a particular group has and incorporate this information into the plans for the meeting. It can be frustrating and even

demoralizing for meeting participants to be asked to engage in analyzing a problem or crafting a solution if they know that the decision has already being made elsewhere in the organization and they are simply being informed of the change.

The four levels of empowerment are as follows (Bens, 2012):

- Leadership decides and then informs staff.
- Leadership seeks input from staff before making a decision.
- Staff and clinicians decide and make recommendations to leadership.
- Staff and clinicians decide and act.

One of your roles as a PF will be to help meeting conveners in the practice become aware of these different empowerment levels and use this awareness to guide development of meeting agendas and processes.

PF Roles in Meetings

As a PF, your role in meetings will vary. Typical roles that PFs play include: convener, leader, facilitator, trainer, participant, and observer. Being clear on your role in each meeting will enable you to play the role effectively and let the practice know what to expect from you and how to engage you as a resource. It can also help you determine how to prepare for the meeting. Below we discuss these roles.

Convener. A meeting convener typically calls the meeting or session and is in charge of engaging initial participants (Bens, 2012). A PF often serves as the convener for early meetings with a practice to determine improvement needs and goals and to plan the creation of quality improvement infrastructure in practices where this is lacking. As a PF, you are also likely to be the convener for meetings to report back on the results of performance data. As an outsider to the practice, you will want to coordinate any convening with your primary point of contact in the practice to ensure that you are working in partnership with the practice and working toward building capacity within the practice rather than simply taking on these tasks yourself.

Leader. A meeting leader or chair typically oversees the focus and content of the meeting. The leader shepherds creation of the agenda—even if it is created collaboratively with other practice members—and guides the group through desired content during the course of the meeting (Bens, 2012). Although leaders have primary responsibility for the content of the meeting, in many instances, they also serve as facilitators for the meeting process. Combining these functions can be difficult, but is often necessary when no one is available to facilitate. A meeting facilitator focuses on the process of meetings. The facilitator works closely with the leader and ensures that all attendees have an opportunity to participate, helps "unstick" meetings when they get bogged down, and prevents meetings from going off on tangents (Bens, 2012).

Facilitator. PFs often assume the role of facilitator for meetings. To be an effective facilitator for meetings, you will want to become an expert in observing the process rather than the content

of a meeting. Typically, in this role, you should not contribute to the content of the meeting, as this can interfere with your ability to observe and guide the process of the meeting.

You will want to become skilled in reflecting on meeting process. For example, you will want to know how to identify and reflect on group processes that are occurring during the meeting and bring them to participants' awareness. Examples of reflective comments include statements like:

- "It seems like the group is hesitant to talk about this issue. Do you see this, too? What do you think is creating this hesitation?"
- "I notice that the physicians have been doing most of the talking today so far. For meetings to be the most effective, we want to hear from everybody. Sally (the medical assistant in the group) what are your thoughts about the ideas being discussed?"
- "Tom, I hear how concerned you are about the patient wait times. This is a very important issue that the group needs to discuss and I am glad you are bringing it forward. The agenda today is focused on improving the reports we are generating from the EHR. Can we put patient wait times in the parking lot for today, and the QI chair and I will touch base with you after the meeting to set up a different meeting time to discuss it?"

You should be skilled in managing individuals who may dominate a session, and encouraging participation from quiet members or those with lower professional status who may be afraid to offer their opinion. You will also want to become adept at summarizing the content of discussions to encourage and clarify input and move the discussion forward. ("So, Tom, it sounds like you are saying that staff do not have enough time to process paperwork. Is this what the rest of the group is hearing?")

In some instances, you may find yourself being pulled into facilitating a meeting that is floundering when you have not been explicitly assigned this role. If this occurs, it can be helpful to reflect on this with the group and check in with them about what type of support they need to have more effective meetings. You can briefly summarize the elements of effective meetings, and if appropriate, suggest that you facilitate a few meetings for them so they can observe the facilitation process and make progress on meeting content.

Trainer. Another role that PFs can assume in meetings is that of trainer. As a trainer, your goal is primarily educational. You are focused on building attendees' skills and competencies on a certain topic. You may fill this role through a presentation of interactive educational methods and modeling (Bens, 2012).

Participant. PFs can also take part in meetings as a participant. In these instances, you contribute to the discussions along with other participants.

Observer. Finally, PFs may serve as outside observers. This role can be particularly useful when you are beginning work with a practice as a way to learn about its culture, how staff members work together as a team, and the issues that are concerning them. Be aware that observing a meeting may change meeting dynamics somewhat, but will still enable you to observe how meetings are run, whether participation is diverse, the dynamics of the meetings, and the content

of the sessions. When you attend as an observer, you will want to make sure the leader or facilitator introduces you briefly and explains your purpose for observing in order to put participants at ease (Bens, 2012).

At times, you may assume several different roles in the same meeting. For example, you may help facilitate a session for the medical director and also provide a brief training to the group on a practice-specific topic such as meaningful use criteria or ways to use meetings to change culture. Think about which roles you will fill during the meeting and check with the leader, facilitator, and other participants about the roles they would like you to assume. One easy way to do this is to ask the meeting convener what role he or she would like you to assume in the session. For example: "Dr. Jones, I'm looking forward to the meeting tomorrow. Tell me briefly what you are hoping to get out of the meeting and what you would like me to do during the meeting. Would you like me to observe, facilitate, or fill some other role?" Then, clarify your role to the group at the beginning of the meeting.

Role of PF in joining established meetings. As a PF, you will face unique challenges in working with practices to improve their meeting processes. It is typically easiest when you are involved from the beginning with forming a team and establishing its meeting process and norms. This provides you and the practice with a blank slate to introduce new processes, develop new skills, and establish norms among the meeting team members.

More frequently, you may find yourself joining in and working with an existing team and participating in meeting processes that are already established. Introducing new skills and processes in this scenario can be more challenging. Unless the practice staff ask you to train them in running more effective meetings, you will want to observe how the existing team runs its meetings for a number of sessions before you offer training.

When you offer to provide training, be careful that your suggestion does not come across as a criticism of the team or meeting leader. It can be helpful to speak with the meeting leaders individually to discuss their assessment of the meeting process and ask whether they are interested in improving these processes. If so, then you can offer to provide training either to the meeting leader individually or to the entire group. Other options you can consider are to (1) direct team members to some of the resources you have found most useful, or (2) offer to help them prepare for and run the next meeting and use the opportunity to model effective meeting processes.

Effective Meetings 101

As a PF, you will want to know the basics of running an effective meeting. One key to effective meetings is for facilitators and leaders to give as much attention to the process of the meeting as its content. There are many excellent online resources and training programs that you can use to improve your skill in facilitating meetings and training practices in the same processes. The information provided below is a summary of basic information about effective meetings and meeting facilitation.

Preparing for the meeting. Effective meetings don't just happen. They require a considerable amount of preparation and thought. This includes clearly defining the purpose and goals of the meeting, inviting the appropriate people, and selecting a location that is comfortable, accessible, and conducive to meaningful exchanges among participants. It also includes determining the appropriate duration for the meeting; creating the agenda; selecting process tools to help participants engage in meaningful analysis, discussion, and decisionmaking; and preparing the meeting materials and meeting room.

Define the purpose of the meeting. An important first step in planning for a meeting is to clearly define its purpose to avoid confusion among participants. Work with the group leader to determine whether the meeting is for information sharing, planning, problem solving, or relationship building. You will also want to define expectations for participants' involvement. Are participants simply helping to inform decisions that will ultimately be made by someone else, or will they help make actionable decisions during the meeting? Based on this information, you can then define the specific goals and desired outcomes for the meeting. For example:

Sample Meeting Purpose and Goals

Purpose: To share information about the patient registration process. Information will inform decisionmaking by the QI director.

Goals: To identify problems in the registration process, gather ideas from staff about how to improve this process, and inform the QI director's decision about whether to embark on a formal LEAN process for improving registration.

Select participants. Meeting participants should be determined by the purpose of the meeting. When changes are being planned, it is important to include individuals from all areas of the practice that will be affected—from administrative clerks to medical assistants, clinicians, practice leaders, and even patients. When convening a group for a meeting, you will want to work with your practice champion to develop the invitation list. This will ensure that (1) you invite everyone who should be included, and (2) you do not overstep any boundaries. It will also provide an opportunity for you to model skills in creating effective meetings. When you invite individuals to participate, make sure that they understand the goals of the meeting, the time commitment, and the reason they have been invited.

Determine the best modality for the meeting. Meetings can be held in-person, virtually, or through a combination of both. In-person meetings are preferable for making difficult decisions, planning complex changes, or relationship building. Virtual meetings work for check-ins and to keep projects moving along when it is not easy for a team to get together. Meetings that combine in-person and virtual modes are more difficult to facilitate but are quite common in health care because staff are often located at different practices, and attending meetings at another site can be difficult and costly for them. Combined in-person and virtual meetings are also useful when you are engaging an outside expert.

Meetings that combine in-person and virtual modes are the most difficult to run effectively. It can be difficult to keep the virtual attendees engaged as in-person attendees discuss issues. In addition, virtual attendees can pull the focus of the meeting away from the in-person participants. You will want to monitor these meetings carefully, to balance the need to include virtual participants but not disrupt the in-person interactions and discussions.

When using virtual methods, use video conferencing if possible. Participants in virtual meetings are often hesitant to turn on their cameras. When feasible, encourage them to do so, as the visual feed can help improve interactions and connections with other meeting participants. Be sure to test connectivity and the platform you will be using before the meeting.

Set the meeting location. Select a location that is easily accessible to participants. Choose a room that has enough space for participants to sit comfortably, usually in a circle or semi-circle, and that provides a table or other surface for participants to write on. Pay attention to issues such as glare from windows, room temperature, ambient noise, availability of restrooms, and places for participants to step out to take calls if necessary. Make sure that participants have easy access to power outlets when needed.

Determine the meeting duration. Meeting length in primary care environments is often determined by external realities such as the need to be present for patient care. Duration should also be determined by the purpose of the meeting.

Check-in meetings for work already underway can be short. For example, a team working on a Plan Do Study Act cycle might only need to do a PDSA Huddle of 15 minutes, with each individual briefly reporting on the progress on the cycle.

Meetings that involve decisionmaking and in-depth planning require more time. You should plan on 60 to 90 minutes for these types of meetings. Meetings longer than two hours can be less productive, as participants typically are unable to focus for more than 90 minutes.

When longer meetings are scheduled (for example, for a practice retreat), you can manage them by breaking the time into a series of shorter meetings, with breaks in between. You should be sure to include a number of interactive processes to keep individuals engaged and actively participating.

A few tips to keep in mind:

- Meetings that are too short can be wasted time. Little gets accomplished, especially when you have to catch up latecomers on what they missed. It may be a while before you can get this group together again and you do not want to be unable to make project progress between meetings.
- Meetings that are too long also can be wasted time. If your meeting is too long, participants can get distracted as their attention threshold approaches. Group members may begin to feel that they are neglecting other tasks, and they may be hesitant to attend your next meeting.

- Meetings have a cost. Be sure to consider the cost of meetings that you and others schedule from a payroll perspective. How many hours each day, week, or month has the director allocated for staff or clinicians to participate in this project, and how much of that time do you want to use for meetings? How much time are clinicians being asked to be out of clinic and what is the revenue lost during this period as well as the impact on patient access? On the other hand, there are also costs to not meeting. What is the impact on teamwork, organizational planning, and quality of care if the group does not meet, communicate, and solve problems? Thinking about these costs can help motivate groups to make optimal use of meeting time.

Create the meeting agenda. Agendas are an essential part of effective meetings. They alert participants to the purpose and topics of the meeting as well as its goals. They also provide a structure and can help the chair or facilitator keep the meeting on track.

Ideally, agendas should be developed well in advance of the meeting and distributed to participants with sufficient time before the meeting to enable them to come prepared. This said, you should assume that participants will not necessarily have prepared and incorporate this into your meeting plan.

For established working groups that already have a solid idea of their scope of work and the related issues, the meeting convener can set the agenda alone or use a more participatory approach. In a participatory approach to agenda setting, you circulate a tentative agenda and ask group members to react to it and submit changes and additional items they would like to discuss. This approach will give you a good idea of issues that participants are thinking about and want to discuss and allow you to prepare to address them during the meeting or defer them to another time.

For short meetings, such as PDSA check-ins, you can use a standing agenda structure that might be provided in paper format at first until the group learns the order of items (see Figure 22.1 for an example). After the standing agenda has been well established, you can switch to directing the meeting verbally.

Figure 22.1. Sample of combined meeting agenda and minutes sheet

(DATE AND TIME)	(LOCATION)	**Facilitator:** **Timekeeper:** **Note-taker:**

Participants:

TOPIC	DECISIONS/ACTION ITEMS
Introduction and welcome	
Review of meeting goals and purpose (Who/Time)	
Review and discussion of recent performance data (Who/Time)	
Review of PDSAs (Who/Time)	
Discussion of plan for coming week (Who/Time)	
Assignment and review of action items (Who/Time)	
Wrap-up and next meeting (Who/Time)	

PARKING LOT ISSUES
(Topics brought up during the meeting that need further discussion at a later date)

Action items, deadlines, and responsible parties

Select process tools. Effective meetings include processes for accomplishing the goals set for the meeting. The processes you or others use during a meeting should be defined prior to the meeting and included in the agenda. There are a number of different processes that you can use to help participants to make progress toward their goals, or that you can train members of the practice to use during their meetings. Examples of these processes are:

- Root cause analysis (see Module 11)—for analyzing problems and generating solutions
- 5 Whys (see Module 11)—for analyzing problems and generating solutions
- Appreciative inquiry (see Module 9)—for developing a vision of the future and planning

Other processes you may want to become familiar with include:

- Strengths Weaknesses Opportunities Threats Analysis (SWOT)—for assessing what the organization is doing well and what it could improve on
- Force field analysis—for evaluating factors that are facilitating or impeding progress
- Needs and Offers—for building understanding among participants and creating collaborative solutions
- Brainstorming in person or in writing—for generating new ideas and soliciting ideas from all participants

Facilitating with Ease: Core Skills for Facilitators, Team Leaders and Members (Bens, 2012) provides a summary and basic instructions for more than 20 processes you may want to use to facilitate effective analysis, problem solving, and collaboration in meetings. As a PF, you should be comfortable with using at least 3 or 4 of these processes.

Gather materials and set up meeting room. It can be helpful to create a checklist of everything you will need to run your meeting smoothly. You will also want to consider the unique challenges of planning for meetings in practice environments. You should plan on supplying materials and equipment yourself in the beginning, and not count on the practice's ability to furnish them. Over time, you will want to help the practice equip itself with the tools to run effective meetings:

- Projector and screen (if indicated)
- Flip chart and pens (paper with adhesive on the back is useful so you can hang completed pages on the wall)
- Dry erase markers for dry boards (if available)
- Paper copies of the meeting agenda and any handouts
- Paper and pens for participants to make notes
- Post-it notes (different sizes)
- Refreshments (if indicated)
- Nametags (if indicated) (sticky types or ones that use lanyards are preferable since they do not damage clothing)
- Place cards (if indicated)
- Internet connection

- Power cords and power strips
- Laptop
- Thumb drive
- Water bottles
- Omni-directional speaker or conference phone for any phone-in participants

You will also want to attend to the environment and set-up of the meeting room. Be sure that the temperature is comfortable, and that windows have coverings or some way of reducing glare if needed. There are a number of ways to arrange the room to support meeting goals. Room set-ups for trainings might look like a traditional classroom. Set-ups for meetings that will involve discussion and collaboration among group members might use a horseshoe or circle configuration. Be sure that the white board or flip chart or screen can be seen by everyone, and that participants will be able to hear each other well (Schwarz, 2002; Adams, et al., 2007; Bens, 2012).

Running the meeting.

Distribute the agenda. Provide everyone with a copy of the agenda at the start of the meeting.

Welcome participants. Welcome participants to the meeting to signal the start of the session. Quickly review the purpose, goals, and timeline of the meeting, and the role assignments for the meeting. Reassign if necessary.

Check-in with participants. When running a relationship-centered meeting, the next step is a quick "check-in" with participants. In this phase, you ask each individual to share how they are doing that morning or afternoon and whether there are any issues in their life that may distract them from the meeting. The purpose of the check-in is to build relationships among participants, and also recognize that individuals have a variety of issues in their lives that may affect their ability to be present or participate in the session. This helps members better interpret each other's statements, actions, and participation. See Appendix 22A for in-depth information on relationship-centered meetings.

Define the ground rules. When a group of individuals is meeting for the first time, or new members have joined the group, it is helpful to define "ground rules" for the meetings. These rules create consistency and predictability for meeting participants, and help create the safety that is needed for members to participate fully in the sessions.

There are many recommended meeting rules. Typically, they address issues such as the use of technology during meetings, the ways individuals address each other and deal with conflict, and general rules such as arriving and ending on time. You should aim to establish enough rules to provide guidance and safety, but not so many that the group becomes bogged down in procedural issues. One of the best ways to create these rules is to define them collaboratively with participants. To begin the definition process, you could provide participants with a list of rules other groups have used and ask them to react to these to form their own.

If you are working with an existing team or standing meeting, you will want to ask the meeting chair if the group has already established ground rules for their meetings. If they have not and the group is experiencing difficulty during the meetings or in moving forward, you might suggest that they use your joining the group as an opportunity to take a step back and create some rules and guidelines. This will allow you to model good meeting practices and can help the team enhance the effectiveness of their meetings.

Some meetings may require a special set of norms to ensure that time is spent effectively. This can be particularly true if difficult issues are being discussed during a meeting. In these instances, you or the meeting facilitator can ask the group to identify the rules needed to ensure solid participation. For example, the facilitator might say to the group, "The agenda today includes some difficult topics. What, if any, rules or norms do we need to put in place today to ensure that we have productive discussions rather than unproductive arguments?" (Bens, 2012).

An example of meeting rules is provided in Figure 22.2.

Figure 22.2. Sample of meeting ground rules

1. Arrive on time, end on time.
2. Everyone has something to contribute and participates.
3. Avoid making assumptions.
4. Explain your reasoning.
5. Discuss un-discussable items.
6. Leave cell phones and other distractors at the door.
7. Focus on progress toward the overall goal, not individual positions.
8. Embrace positive conflict and dissent as a way of improving decisionmaking.
9. Adopt a mindset of curiosity and exploration, not fault finding.

Assign roles. Assigning roles to meeting attendees can build capacity in the practice for running effective meetings, encourage more participation by attendees, and help make meetings run more smoothly. It also helps engage participants in the meeting.

A clever way to introduce the idea of roles and assign them to participants is to use the "Role Cards" provided in Appendix 22B —the Dartmouth Institute Microsystem Academy, Cystic Fibrosis Foundation, and the Children's Hospital of the King's Daughters created these cards to define and help remind each person of their role within a meeting (Dartmouth Institute Microsystem Academy, et al., 2012). The first time you use roles, you will want to provide a brief training to your meeting participants on the different roles and their purposes, and invite participants to volunteer for each role. In the absence of a volunteer, you can assign them. After this initial introduction, you and the group can decide to pre-assign these roles and include them on the agenda to save time at subsequent meetings. The roles include:

Timekeeper. The timekeeper is responsible for alerting the leader, facilitator, and participant of the time, and helping to keep the meeting running on track. The timekeeper should provide cues to the group when there are 5 minutes left and 2 minutes left to keep an item from running over

time. When a particular agenda item is running over time, the meeting leader and facilitator can work with the group to decide whether to extend the time allotted for the particular discussion or activity and amend the rest of the agenda for the meeting, or stick with the original agenda.

Facilitator. The meeting facilitator does not offer opinions on meeting items or topics, but instead focuses on managing the group process. The facilitator observes who is participating and who is not, calls on quiet or silent members, and redirects individuals who may be dominating the discussion. The facilitator can suggest that items that are off topic be placed in a virtual "parking lot" for discussion at a later time. (A parking lot is a place you record important ideas, comments, and issues that need to be dealt with but are not appropriate to address during the meeting at hand because of time limitations or because they distract from the current topic. These are often written on a visible flipchart or its virtual counterpart.) The facilitator may also suggest putting topics that are generating unproductive conflict in the parking lot for consideration later when the group has time to consider them or emotions have calmed down. The facilitator can also alert group members when they are avoiding a topic or going off topic, and encourage them to reflect on what is happening to the meeting process and why.

Leader. The meeting leader sets the agenda, welcomes the group, defines the purpose and goals of the meeting, and leads the meeting through the agenda. The leader focuses on the content of the meeting, and monitors progress toward meeting goals. He or she calls on participants for their ideas and input and works to include all members of the meeting in the discussion. He or she calls on the facilitator for assistance when needed.

Participant. Meeting participants follow ground rules, participate in the meeting, provide ideas and input, and report on progress toward action items.

Recorder. The recorder documents the meeting discussion. This can be a challenging role as it is not always obvious what should be documented. You will want to provide recorders with guidance on what you want them to document before the meeting starts. You can also cue them to take down important points throughout the meeting. For example, "Sally can you be sure to include the group's decision about Point of Care A1cs in the meeting minutes?" The recorder can use a structured form such as the one provided in Figure 22.1, or use a note pad, flip chart, white board, or computer. The recorder should also note items that are placed in the meeting parking lot and specific action items and to whom they are assigned. Whenever possible, parking lot items should be written up so the entire group can see them. This reassures members that their ideas are being taken seriously and not being dismissed, which builds trust and reduces anxiety among members.

Facilitate engagement of all participants. Effective meetings are the ones in which all members openly participate and contribute ideas without concern about being criticized or ignored. They also encourage a spirit of curiosity and teamwork. Facilitating this type of open participation can take some effort, but is one of the most valuable skills you can possess as a PF. Teaching practice leadership to do the same is also challenging, but can help introduce important changes in the culture of the organization. Some people may find this type of open participation threatening because it requires more time, which practices almost always feel is in short supply; typically generates more discussion and, therefore, more conflict; and can lead to individuals' sharing information that leadership may not want to hear or may have heard and dealt with already.

Useful techniques for facilitating participation of all members include: calling on quiet members directly, redirecting dominant participants and engaging them in encouraging participation of others, and honoring all contributions.

Call on quiet participants. You can engage the quiet members by asking them direct open-ended questions such as: "Mary, how does this affect the staff in your department?" or "Thomas, I'd be interested in hearing your thoughts about what is being discussed. What problems do you see?" Often, the quiet member is the one with a critical observation or important idea. Avoid asking quiet individuals questions that require deep technical knowledge unless you know they already know the answer, as these types of questions can put them on the spot and cause them to avoid participating in meetings in the future.

Appreciate and redirect dominant participants. It can be tempting to become frustrated with and even critical of individuals who dominate discussions in meetings. But you should avoid this temptation. These individuals bring energy and commitment to the meeting that, if properly managed, can be channeled to energize the group and produce better thinking and outcomes from the session. If not handled well, these same individuals can completely derail a meeting. The outcome depends on your skills in facilitating their involvement. A useful tool when working with dominant individuals is to reframe them as "passionate" and energetic participants rather than a problem. Your task is to channel their energy and passion to make the session more effective.

One technique for doing this can be to reflect on what the individual is saying, acknowledge his or her contribution, and then segue to another participant for input. For example: "Jim, so you are suggesting that we schedule patients for the women's clinic on Saturdays as well as during the week? This is an interesting idea. Let's hear what others have to say on this topic. Janet, what are your thoughts on operating hours for the women's clinic?"

When this technique does not work, you can consider a more direct approach: "Jim, you've had a lot of interesting and helpful ideas about this today. I'm curious to hear what others are thinking about what you've said and the other issues raised. Let's hear from them now."

Finally, if despite your best efforts, you are having difficulty managing the meetings and ensuring they are productive because of this individual, you can consider meeting with the individual outside of the meeting time and asking for his or her help getting the meetings on track. "Jim, I appreciate your passion in the meetings. But I need your help. I've observed that others are not speaking up and this leaves you as one of the only contributors. Help me think through how we can get more people participating and sharing their thoughts in the meeting."

Honor each contribution. In all your interactions with meeting participants, it is important that you respond respectfully and acknowledge each of their contributions. Open criticism or dismissal of even one idea can shut the group down and discourage others from participating, afraid they may meet the same fate when they speak up.

Document the meeting. Be sure to document each meeting. This is traditionally done by taking meeting minutes. Documentation helps participants remember what took place during the meeting and gives them an opportunity to clarify any items that they feel are not accurately represented in the minutes. It can also provide a means for confirming and introducing accountability for action items assigned to various participants. Figure 22.3 provides an example of a combined agenda and minutes sheet. Combining agenda and minutes can be an efficient way to document meetings, and to keep track of and monitor follow-through on action items.

Figure 22.3. Sample agenda with a process tool for analyzing performance data

Tuesday, March 10	Conference room A	Facilitator: Sally Thomas Timekeeper: Margarita Ramos Note-taker: Tom Jones

Participants: Sally, Margarita, Tom, Jose, Grace, Jehni, Kevin

TOPIC	DECISIONS/ACTION ITEMS
Introduction and welcome Sally (10 minutes)	
Review of meeting goals and purpose – Review performance data on asthma management and develop a PDSA. Sally (10 minutes)	
Presentation of recent performance data Grace (15 minutes)	
Open discussion of performance data Tom (15 minutes)	
Process: Root cause analysis (RCA) in small groups Sally (30 minutes)	
Discussion of results of RCA as large group Grace (30 minutes)	
Wrap-up Sally (10 minutes)	
PARKING LOT ISSUES *(Topics brought up during the meeting that need further discussion at a later date)*	
Action items, deadlines and responsible parties	

Summarize meeting and confirm action items. At the end of each meeting, the leader should provide a quick summary of what occurred during the meeting, including decisions and proposed action items. The leader should also ask for corrections and input from the group, and facilitate assignment of action items and definition of next steps.

Evaluate the meeting. Consider conducting a quick evaluation of the meeting at the end of the session. Except in situations such as a retreat or training, the evaluation does not need to be formal. Simple is often the best in these instances. A tried-and-true method for collecting helpful information is to ask people to give a quick verbal rating of the session and then briefly explain about what would make the session more effective. For example, you might say, "With 1 being not at all effective, and 10 being extremely effective, how would you rate today's meeting?" (Go around room.) "If you rated it a 10, what made it a 10? If you rated it less than a 10, what needs to happen next time to make it a 10?" If you are concerned that individuals may censor their feedback in front of you or others in the room, you can ask them to jot down their answers to the questions on a sheet of paper and hand it in as they leave the meeting, or you can send them a brief online survey to complete after the meeting. Doing these types of simple evaluations every few sessions can provide you and the meeting leader with important feedback about improving the meeting process. It also models internal quality improvement and continuous performance monitoring.

Managing conflict during meetings. Conflict is an important part of effective decisionmaking and effective meetings. Without it, groups can veer into a false consensus or harmony and make less-effective, even counterproductive, decisions. As a PF you should view conflict as your friend and grow concerned if you do not encounter it during meetings or in the course of your work with a practice.

That said, conflict can be distressing both to you and to others in the organization. One of the skills you bring is the knowledge of how to navigate conflict effectively. Conflict that takes place during meetings can offer you a window into what happens on the practice floor and in the organization.

As a PF, you can observe the points of conflict, and help practices learn to use conflict as a resource for making better decisions. Practices that avoid or over-manage conflict do not encourage a culture of quality. Differences of opinion are normal, especially in a diverse work group, and should be approached with an attitude of curiosity.

You should become comfortable with teaching practice members how to engage in productive conflict and how to harness conflict to make more effective decisions. A first step in doing this is helping practices redefine conflict. Instead of a problem or something to be avoided, conflict should be viewed as a resource for making better decisions. A second step is to help practices tell the difference between productive and destructive conflict. Productive conflict encourages better, more-diverse thinking about a problem. Destructive conflict shuts down discussion and problem solving, and can prevent a group from moving forward. (See Table 22.1 for a summary).

Table 22.1. Differences between productive and destructive conflicts

In productive conflict….	In destructive conflict…
• People are open to hearing others' ideas. • People listen and respond to ideas even if they don't agree with them. • Everyone tries to understand the views of others. • People stay objective and focus on the facts. • There's a systematic approach to analyzing the situation and looking for solutions.	• People assume that they're right. • People wait until others have finished talking, then state their ideas without responding to ideas of the other person. • No one is interested in how others see the situation. • People are attacked and blamed. • Hot topics get thrashed out in an unstructured way.

Source: *Facilitating with Ease!* (Bens, 2012).

One method for helping a group become comfortable with conflict is to observe it directly. You can help create safety for the group by letting them know that you are aware of the conflict and are not ignoring it. At the same time, you are signaling the group that it is okay to openly disagree.

You can manage conflict by making simple observations. For example:

> "I want to make a quick comment about group process. Tom and Jim clearly have a difference of opinion about how we should manage the clinic registration process."

> "These kinds of discussions can be uncomfortable but they also can lead to better decisions and a better process in the end."

> "Tom and Jim, I'd like to check in with you. Is discussion helping you move forward with your thinking about the registration process? Can you share some of the ways it is helping you in your thinking about this? Or is this distracting you both from the purpose of our meeting?"

> "Let me also check in with the group. Is this discussion helping you clarify your ideas and thinking? If yes, how? Or is it distracting us from the task at hand?"

By commenting on what is occurring without judgment, you signal the group that productive conflict is acceptable and even desirable in meetings.

If participants in a group seem uncomfortable with the conflict that is occurring, you can observe this also. For example, "I see some people squirming a bit. It seems like people are getting uncomfortable with the discussion. Have you all had discussions like this in the past? How did they turn out?" This gives members a chance to share their fears or concerns, and provides you with information about how conflict has been managed in the past.

You can then work with the group to determine how best to proceed in this particular instance. For example, in a group that has had a great deal of unproductive conflict, you might chose to stop the current debate and suggest the team take a step back at the next meeting and revisit the group's goals and the rules for their meetings.

Depersonalize conflict by redirecting discussions about blame from the person to the process. One cause of destructive conflict is the common tendency to focus blame on a person rather than a process. Groups can get hung up on "scapegoating," blaming a team member, leader, or other individual for the problems they are experiencing. This almost always brings effective problem solving to a halt, as it is difficult to force change in others' behavior, and the problems are almost always more complex than a single individual's behavior. If the problem is a single individual, it is a human resource issue and it is typically not useful for a practice improvement group to focus on it.

As a PF, you can encourage group members to shift focus from the individual to the process. Encouraging the group to reflect on the dynamic will help them interrupt it. For example, you might say, "It seems like the group keeps focusing on April as the cause of the problems, and the mistakes they believe she is making. This may or may not be true. Let's shift the focus for now from individual people to processes. Let's talk about the processes and systems involved here and what could be changed that could help reduce errors and improve performance."

Set guidelines for encouraging productive conflict. In some instances, it can be helpful to define for participants the differences between productive and destructive conflict and debate and engage them in creating rules to guide conflict during meetings. You can share Table 22.1 with the group and ask them to create some guidelines for productive conflict based on it.

Interrupt a conflict when it becomes personal or destructive. The exception to the use of conflict to encourage more effective problem solving is when participants become verbally aggressive or disrespectful with each other. This happens from time to time, especially when an organization is under considerable stress or undergoing significant change, so do not be surprised by it.

In these instances, it is important to intervene in a calm, respectful manner. You will want to interrupt the unproductive discussion, reflect on the process, and ask the involved individuals to agree to put the issue to the side until a later time (place it in an emotional parking lot).

If participants refuse, then you may find it necessary to ask them to take a break and return to the meeting when they have calmed down, or to disband the meeting until later. While this is a rare event, it does happen. Even in these instances, you should view the events as information about the degree of stress that individuals in the organization are under and as energy that can eventually be redirected to support improvement work. Resist the urge to criticize or write difficult participants off. Often the most difficult participants become the strongest supporters in the end.

Use a parking lot to diffuse unproductive conflict or to keep a meeting moving forward. Another useful tool for managing unproductive conflict is the written parking lot. The meeting facilitator,

whether it is you or a member of the practice, can simply state, "Tom, that is an interesting idea. If it's okay with you and the group I'd like to put it in the parking lot for now, and come back to it in another meeting."

The facilitator then should check with the meeting chair and participants to see if they are in agreement with waiting on this item. If they are, then the item should be written down on a flip chart or a white board at the meeting that the entire group can see. If this is not possible, the facilitator can write it on a sheet of paper.

It is important, however, that the facilitator follow up with the commitment at the end or immediately following the meeting. This builds confidence and reduces participants' anxiety by keeping the meeting on track while making sure that their ideas and concerns will be heard and discussed in the near future.

Unsticking stuck meetings. Sometimes meetings do not gel. Participants can get "stuck" on a particular topic or participation in discussions can be lackluster. Everyone will have a failed or stuck meeting from time to time, and there are some tools you can use to help "unstick" them.

Know the signs that a meeting is getting stuck. First, you need to recognize that the meeting is bogging down. Signs of this are individuals making the same comments over and over or debating the same issue without arriving at a decision or clear action items. Other indicators are flat conversations, low participation, and participants who look bored or distracted (or who even walk out of the meeting). These are difficult moments for a PF and for meeting leaders. It is important that you not personalize these events when they happen. This can interfere with your ability to maintain enough objectivity to observe and facilitate the process.

Ask the participants how to unstick it. One of the most effective tools for dealing with a stuck or bland meeting is also the simplest. Ask the group. You can mention that the meeting seems stuck and then ask participants if they are observing the same thing. Ask them what they think needs to happen to get the meeting back on track. For example, you can say:

> "This meeting feels stuck to me today. Not many people are talking and many of you look like you are bored. Is anyone else observing this same thing? Sally, are you observing this? Tom? What do you think is going on that this meeting is stuck? What do you think we can do to 'unstick' it?"

Note that the check-in technique works best with small- to medium-sized groups, and ones that are an hour or more. It is less effective with larger groups of 15 or more because the contributing interactions and dynamics are often at the subgroup level rather than whole group level. Thus, it is difficult to get members to reflect accurately on the processes within the whole group. With shorter meetings, there is typically not sufficient time for underlying dynamics to become obvious to the group, and for the group to discuss them.

Responses to stuck meetings. Often you will discover that a meeting is stuck because a pressing issue or concern has occurred that day and is distracting the group from focusing on the task at

hand. In these instances, it may be appropriate to refocus the meeting to address the hot button issue, or to cancel the meeting for the day. In other cases, the meeting may be stuck because it is redundant, poorly planned, or focused on a low priority issue that group members have little interest in discussing. If so, you will want to work with the group leader and members to identify an appropriate and useful topic for the group to focus on.

Training practice members to run effective and culture-changing meetings. One of the most important contributions you can make to a practice is to help members improve their meeting processes. Meetings are an essential tool in practice improvement and culture change. You should be prepared to train members of the practice to lead effective meetings when appropriate. You can do this one-on-one or in-group training. Individuals who might benefit from this training include the practice leaders, the director or chair of the quality improvement committee or team, and the practice manager, among others.

You can use this module as the basis for the training, or the training resource on relationship-centered meetings in [Appendix 22A](#).

To get individuals excited about improving their skills in running meetings, you can talk about how meeting process can be used to improve organizational culture, prepare inclusive invitation lists, invite open dialogue, encourage curiosity rather than fault finding, and listen to and honor participants' contributions. The goal is for leaders and staff to begin to see meetings as a powerful tool for change rather than a necessary evil.

Remember that one of the best methods you have for training practice members in running effective meetings is modeling. When you lead meetings, be aware that you are indirectly training your practices on meeting techniques. A training curriculum for leading relationship-centered meetings is contained in [Appendix 22A](#). You can use this resource to hold a special training at the practice on meeting skills or to train individuals such as the practice leader.

Summary and Conclusions

Meetings are an essential tool in the PF's toolbox for supporting change and building capacity in a practice. As a PF, you may run meetings for practices—but more importantly, you will model and teach practices to run their own meetings more effectively. Finally, you can help practice leaders learn to use meetings as a tool for changing practice culture and introducing processes and norms that support a culture of continuous improvement. Good meetings can change everything. Bad meetings can, too. It is essential that you be an expert at leading and facilitating meetings and teaching practice members to do the same.

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Appendix 22 A. Relationship-centered Meetings as a Tool for Changing Practice Culture

Reproduced with permission from: Anthony L. Suchman and Penelope R. Williamson. Principles and Practices of Relationship-Centered Meetings

Facilitating relationship-centered meetings

The quality of relationships within a work team or committee has a profound effect on the group's results. It determines the participants' willingness to bring forward their diversity and differences as a resource for creativity, their openness to change, their motivation and initiative, and their commitment to the group and its work. Many, if not most meetings are conducted in a way that actually inhibits relationships and engaged conversation, resulting in meetings that feel dull and unproductive. Fortunately, there are some straightforward principles and simple meeting formats that can make meetings more relational and elicit high-quality participation. These methods require no additional time, only a little bit of courage to try something new. You can provide the leadership needed to suggest or implement these methods regardless of whether you are a team leader or a team member.

Principle #1: Invest Time in Relationship Building; It Will Pay Large Dividends in Efficiency and Performance. When members of a team know and trust each other, people can say what they think and explore each other's positions. Differences of opinion and perspective are a stimulus for creativity, not conflict. Meetings are enjoyable and the group makes rapid progress. Conversely, when people don't know each other, they get hung up on stereotypes ("What do you expect from an immunologist, or a social worker?"). They misinterpret each other's meaning and intentions and get mired in unnecessary conflict. They hold their ideas back for fear of ridicule and they waste a lot of time defending themselves and protecting their turf - time that could be better devoted to the work at hand. Often the urgency of the work makes it tempting to short-cut relationship building ("We don't have time for this 'soft stuff;' there's real work to do.") but it is always a false economy. The more urgent the work, the greater the likelihood of inadvertent relational breaches that amplify over time, the more urgently good relationships are needed, and the poorer the efficiency and outcomes will be if they are lacking.

Methods

Initial meeting: There are many ways to help people get to know each other at the first meeting of a group. Participants can take turns introducing themselves, saying a bit about what they had to do or give up to attend the meeting and why it was important to do so. Or they can tell a brief story about how they have come to be where they are at this point in their careers and lives. If the group numbers between 8 and 16, you might invite people to divide into pairs. People take turns interviewing each other for a few minutes using the questions above, and then when the whole group reconvenes each person introduces her/his partner. If the group numbers 8 or fewer, you might still use the paired interview approach or you can invite people to tell their stories directly to the whole group. In the latter case, it helps establish trust in the group to give people the option of passing if they'd rather not address the whole group. People rarely avail themselves of

that option but it makes them comfortable to know they have it.

Subsequent meetings: At the start of each meeting, it's helpful to begin with a round of "checking-in," offering an invitation to each person, always with the option to pass, of reflecting on how they're doing at the moment or what might be going on for them outside of the meeting that might be diverting their attention. Often simply naming the distraction helps to ameliorate it, and if it is something truly difficult, a child's or parent's illness or a major home repair in progress, for instance, the team members can offer support and will know not to take it personally if that person is observed during the meeting to be staring off into space and scowling. Another approach to check-in is to offer each person an opportunity to describe something that has gone well since the previous meeting.

Principle #2: Foster High-Quality Conversation (Level 2). The "free for all" conversational format at most meetings wastes time and potential. People have to fight to get the floor only to be interrupted before they can complete their thoughts; some people are not heard from at all. This leads to poor listening, ineffective articulation of ideas, a poor sense of teamwork and low commitment to any decisions that result. So instead of a free-for-all, use a little light structure in the service of better conversation.

Methods

Nominal group process: This is just a fancy term for giving each person in turn a specified amount of time without interruption to say what they think. You can allow a brief period of questioning before proceeding to the next person, or you can wait to hear from everyone before proceeding to questions and/or freeform dialog. In one variation, people suggest one idea at a time and keep going around the circle until there are no further ideas. Recording ideas on a board or flip chart can ensure that ideas are not lost. It's often useful to engage in another round of nominal group process after a discussion has been in progress for a while to see what level of consensus exists and what issues still need more attention.

Talking stick: This method involves using an object (traditionally a stick, but any object will do) to signify who has the floor. After finishing, a speaker passes the object to someone else, who then has the floor. This method brings a little order to the conversation and helps people finish their thoughts without interruption.

Principle #3: Explore Differences with Openness and Curiosity. When faced with a difference of opinion, people are all too easily hooked into a struggle over who's right and who's wrong. They fight as if their lives are at stake, and it's no wonder given all the humiliation associated with being wrong in traditional medical learning environments. The challenge here is to recognize that most situations are more complex than any one person can grasp, that everyone has a unique piece of the puzzle, and if anyone's piece is lost everybody loses. When people see things differently, most of the time they are both right.

Methods

The cone in the box: Figure A1.1 is a simple and effective graphic for helping people recognize that different perspectives are not mutually exclusive.[1] It shows a cone inside a box. People looking through a peephole at point A will see a circle, and through point B, a triangle. Their observations may seem mutually incompatible and they will argue forever unless they can get past the belief that someone else's different perception invalidates their own and accept that reality is more complex than what they are seeing on their own.
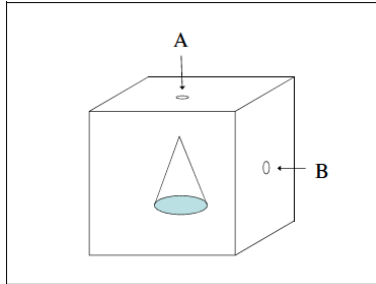

FIGURE A1.1: The Cone in the Box.

Listen for Internal Reactions: A failsafe indicator that you have a difference of opinion is your internal reaction. The most useful thing you can do when you suddenly experience a strong feeling (e.g., anger, defensiveness, humiliation) in response to what someone else says or does is to pause for a moment and "turn to wonder." "I wonder why I'm feeling this way." "I wonder what led him or her to that stance." The discipline of shifting from "knowing that you are right" to curiosity about your response allows you to move to inquiry.

Inquiry and advocacy: When encountering a difference of opinion, presume that the other person is competent and conscientious. Resist the initial temptation to argue and instead use inquiry – exploratory questions – to better understand the other person's views and reasoning. If you can show that you understand his/her view by accurately reflecting it back, so much the better. Only then is it time to advocate for your own perspective, clearly explaining your reasoning. And by then, you may have discovered there is in fact no difference, or that the heart of the difference is something other than what you thought at first, so you can respond more effectively. As a facilitator, you can help your group recognize when they are getting stuck in a right-wrong conversation and invite them to use more inquiry and less advocacy to find their way through.

Principle #4: In Pursuing Change, Learn from Successes. Most groups working on organizational change focus on problems, trying to identify and fix the root causes. The major problem with this time-honored approach is that the problems are too often equated with people. No one likes to be a problem, so people divert a lot of energy into defending themselves to avoid shame; the conversation makes little headway. An effective and
Zen-like alternative is to seek out and learn from instances in which the desired change is already present. They're almost always around if you look for them.

Method

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[1] Brown J. *A Leader's Guide to Reflective Practice.* Victoria, BC: Trafford Publishing; 2007.

Appreciative Inquiry: This philosophy and methodology for organizational change is based on discovering and building upon the existing capacity within an organization. For example, if we want to foster better interdisciplinary collaboration, we'll make more progress by learning from successful instances – what went right, what factors made it possible, and how do we do more of that – rather than discussing where things went wrong and why. Curiously, we'll end up talking about exactly the same issues, attitudes and behaviors in either conversation, but with very different emotional tones that profoundly influence people's openness to change. A typical AI process begins with people pairing up and taking turns telling each other stories of successful collaboration. The interviewer can explore the partners' experiences in more detail using questions such as:
- What did you do or bring to the situation that contributed to the success?
- Who else was involved and what did they do that helped?
- What aspects of the setting or situation made a difference?
- What useful lessons can we take from this story?

Partners can then present each other's stories and lessons learned back to the whole group. This method is, in fact, a powerful form of participative inquiry. It invites people to step forward from a place of capacity rather than defensiveness, and helps people feel more hopeful and welcoming of change. Please see Module 11 on Appreciative Inquiry, for more information and resources on this process.

Appreciative debriefing: A similar approach can be applied in miniature at the close of each meeting. You can invite (with the option of passing, as always) each participant to reflect on moments during the meeting that they found particularly useful, important or engaging. This encourages people to become more aware of the process of their meetings and to discover how they can be helpful to each other. Positively reinforcing these helpful behaviors increases the likelihood of their use in future meetings and builds the sense of connection in the group, thus serving Principle #1.

Principle #5: When Meetings Get Stuck, Interrupt the Pattern. Sometimes meetings get stuck. You may find yourselves going around the same arguments again and again. Or one person may be dominating the conversation or holding fast to a point when the rest of the group is ready to move on. There may be emotions that are not being acknowledged. In such situations, the group can find itself caught in a pattern from which it is unable to extricate itself.

Method

Reflective time out: An effective way to help the group share responsibility for managing itself and changing the pattern is to take a time out from the conversation to reflect together on the conversation itself. Questions like "How is the conversation going so far?" or "What are you experiencing at this moment?" invite people to notice what's happening and to learn from others' observations. Other questions can help the group think about how to move forward include "What would help us right now?" or "What might we try to do differently?" The conversation can sometimes be stuck because an important issue has not yet been explicitly named (there's an "elephant in the room"). A question like "What important topics are we not yet talking about?"

can open the door. The meeting leader or a facilitative group member can offer answers to these questions and make suggestions about how to change the conversation (and may need to if the other group members are not forthcoming), but the group learns more and partnership is enhanced if the group can find its own solutions.

In a reflective time out, you can offer people a quiet moment for reflection and then hear from each person. This is a variation on the method of nominal group process described above. If there is not sufficient trust and safety for people to speak their concerns to each other directly, another variation is to ask people to write their comments down and pass them in to be read anonymously.

Principle #6: Trust the Process; Don't Try to Control the Outcome. Good group process draws forth the best capacity of the group. You will no doubt find yourself heading into some meetings convinced that you already know what decision the group should make, and trying (subtly, or so you think) to steer the group towards your predetermined outcome. There are two major problems with this approach: (1) People don't like feeling manipulated; they will fight you and will be unmotivated to follow through. (2) The group is smarter than you are, so your solution is unlikely to be as good as what the group would come up with. Rather than focusing on the desired outcome, focus on maximizing the quality of the process, on the quality of relationships and trust, and on the quality of listening, exploring, advocating and understanding. If the process is as good as possible, the best possible outcome will result.

Methods

All of the above. The relationship-centered principles outlined above rest on a strong body of evidence. Relationship quality is well associated with a wide variety of organizational outcomes in healthcare, including quality and safety of care, cost, patient and staff satisfaction, and the capacity to learn new procedures. The principles and methods are also easy to apply. They may be unfamiliar and may feel a bit awkward at first. But if you share your awkwardness with the group and let them know what you're trying to do and why, they will support you. Just remember what you are trying to accomplish – creating a more relational environment in which to work and get care. Bold change is accomplished by people who are willing to risk something new. Using these simple principles and methods, you can help your teams reach a new level of performance and engagement.

Appendix 22B. Effective Meeting Role Cards

Timekeeper

Keeps the team on time through tracking time remaining for each agenda item and when necessary requesting the team to re-negotiate time to complete discussions and actions.

- Announce 1/2 way through the time
- Give a one minute warning
- Time is up

CHKD

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...adding tomorrows every day.

Facilitator

- Manage the group process and ensure balanced participation by all members of the group.

- Alert the group when the discussion is not focused on the agenda.

CHKD

Cystic Fibrosis Foundation
...adding tomorrows every day.

Leader

Prepares the Agenda,

and helps move the team
through the agenda by eliciting
participation from all

CHKD

Participant

- Follow Ground Rules!
- Keep an open mind to new ideas
- Arrive early to start on time
- Communicate with all staff to
  share progress and gain their
  interest and ideas
- Have Fun!

CHKD

Source: Dartmouth Institute Microsystem Academy, Cystic Fibrosis Foundation, Children's Hospital of the King's Daughters, Norfolk, Virginia (2014). Used with permission.