



Job Aid: Running Effective Meetings

5 steps to planning an effective meeting

1. Clearly define the purpose and goals of the meeting.
 - "What do we want to have by the end of the meeting that we don't have now?"
2. Select meeting participants.
 - Include representatives from all areas of the practice who are likely to have something to contribute to the task at hand.
3. Choose a meeting format and location.
 - Will it be: in-person, virtual only, or a mixed in-person and virtual format?
 - Where will it be? Select the on-site location or virtual platform.
4. Create the meeting agenda.
 - A good agenda provides the purpose of the meeting and a roadmap for the session.
 - Work with the practice champion or the planning group to develop the agenda.
5. Decide how long the meeting will be.
 - Make the time appropriate to the agenda.
 - Check-in meetings for PDSAs can be short, decision-making about complex issues longer.

Scheduling meetings

Schedules need to be designed around clinicians and staff involved in direct patient care, as they have less flexibility with their time.

Make sure the meeting is necessary before calling one. If you need to hold a meeting, consider these scheduling strategies.

- Hold the meeting when the practice isn't seeing patients. Early morning, lunch time, and later in the day can be good times.
- Ask to have an item - a "mini-meeting" - included as a regular item on the agenda of a standing meeting.
- Meet sequentially with small groups, or even one-on-one, if a larger group isn't feasible.
- Segment your meeting into a series of short meetings that are easier to get on the calendar.



Preparing for a meeting

- Be clear on your role in the meeting and the expectations of any leaders or co-leaders:
 - Will you lead, facilitate, serve as a subject matter expert, or observe?
- Prepare copies of agenda and materials.
- Arrive early to set up.
- Run a dress rehearsal if it will be on a virtual platform.
- Check equipment availability.
- Bring meeting essentials. Keep a meeting “go bag” in your car that includes flip chart paper, markers, a hotspot that you can use to host video conferencing, and a mini projector.

At the meeting

Agree on ground rules that encourage positive participation.

Sample meeting ground rules.

1. Arrive on time, end on time.
2. Participate - everyone has something to contribute.
3. Listen to each other.
4. Explain your reasoning.
5. Don't criticize - this is a safe space where we can discuss anything.
6. Turn off cell phones and other distractors.
7. Focus on progress toward the overall goal, not individual positions.
8. Embrace positive conflict and dissent as ways to improve decision-making.
9. Adopt a mindset of curiosity and exploration, not fault finding.

Facilitate engagement of all members.

- Engage quiet participants by calling on them directly and asking them open-ended questions.
- Manage participants who dominate discussions using the "reflect and redirect" technique. Reflect what they are saying and then re-direct to another participant.
- Honor contributions of all members with non-judgmental statements.



Manage distractions.

Use the "parking lot" technique to re-direct unproductive discussions. You can say, "This is an interesting/important topic. I'd like to suggest we put it in the parking lot for now so we can discuss in the future. Is that ok?"

If the issue seems very pressing, check with the group to see if they want to modify the agenda.

Ending a meeting

- Summarize discussion points, decisions made, action items (including follow-up plan for parking lot issues).
- Take a photo of white board or flip charts for your and participants' records.
- Set time for next meeting.

After a meeting

- Immediately write up minutes.
- Include decisions made and action items.
 - Idea: Use a template that combines the agenda and minutes where you can write minutes, decisions, and action items next to each agenda item after the meeting.
- Distribute quickly.

Running a brainstorming session

Brainstorming is a technique that is used to help a group think creatively and generate a large number of ideas for overcoming a challenge or making an improvement.

Many quality improvement processes and tools include brainstorming as an important step.

Four rules of brainstorming:

1. Generate as many ideas as possible. It's quantity over quality.
2. Don't criticize or judge anyone's ideas or evaluate ideas at this stage.
3. Wild ideas are good; don't censor ideas that sound "crazy."
4. Build on others' ideas.



Steps for running a brainstorming session:

1. Welcome group and review topic they will be brainstorming.
2. Review purpose and rules of brainstorming.
3. Call on each participant round robin style.
4. Write down all ideas. Categorize, but do not censor or leave any ideas off the list.
5. Keep participants focused and remind them of brainstorming rules as needed.

At some point in the brainstorming session, the group will reach a "critical mass" of ideas. At this point, it's not productive to push for additional ideas.

A brainstorming meeting should end with a decision about an action to take. To help participants select the three ideas to explore further or try, you can use the "sticky-dot voting" method.

1. Give each member 3 sticky-dots. (In a pinch they can use their pen.)
2. Have them go to the white board or flip chart and vote for the three ideas they think the practice should follow up on using their sticky dots.
3. Tally the votes, and have the group decide on next steps for the actions that got the most dots.