

## The Art of Running a Meeting (Part 1) - Section I: Planning/Administration

by David Stevens, MD, MA

Meetings are a necessary “evil” that must be mastered. They can consume way too much of your team’s time and effort. If you have a meeting with eight senior staff for an hour, you have taken away a person’s full day of productivity during the time you met.

Don’t get me wrong, you have to have some meetings, but you should first remember these four principles – Keep Them:

1. As Rare As Possible – Since meetings consume a lot of time, set the goal to have fewer sit down meetings and ruthlessly pursue replacing them with better alternatives. Look at the meetings you presently schedule. Are they needed? Are they accomplishing what you intend? Which ones can you eliminate and accomplish your goals in other ways?
- ✦ Tip: Meetings on the Fly – I hate to have progress held up waiting for a meeting or a decision to be made, so we do lots of “meetings on the fly,” like we do when we practice medicine. If I have a problem patient, I may do a “sidewalk consult” or get the key people around the patient’s bed to make a decision. Do the same in management. Quickly call the needed people together and decide what needs to be done. This keeps things moving.
- ✦ Involving As Few People As Possible – Meetings often have people at them that are not really needed. They are there because you don’t want them to be left out. That is a big waste of productivity. Figure out some other way to keep them in the loop.
  - ✦ Tip: Survey: Do a survey of those in regular meetings and ask questions like –*Do you wish you didn’t have to come to this meeting? What are better, more efficient ways to accomplish your job description?*
- ✦ As Brief as Possible – If you are not careful, people come late, personal discussions start and your meeting takes ten to fifteen minutes longer to get underway. Insist everyone is five minutes early and start exactly on time whether everyone is there or not. What is expected is what gets done.

Avoid letting meetings get off track. Last weekend I was at a board meeting where, as we should, we had “Executive Session” at the end of the regular meeting to discuss the President’s performance and how to help that person do a better job. Before the cat could meow, someone got us back on a topic we had discussed earlier during the regular session and we found ourselves talking general board business without the CEO there. This is a big “no ... no.” I had to interrupt and get us back on track.

Continue to ask, *How can we accomplish our meeting goals in less time?* Set a time limit to each meeting. My rule is no meeting can last more than an hour and many should be scheduled for much less time than that. I was recently at the CME conference in Thailand and noted their teaching sessions had been shortened to 45 minutes. I asked why and they related studies show that teachers at hour-long meetings spent 15 minutes telling jokes and personal anecdotes that were not substantive to the topic.

- ✦ Tip: Stand up Meetings – Have stand up meetings where you don’t sit down. Studies show they take 1/3 to 1/2 the time. Some teams such as those at ward shift changes have stand up “Scrums” each day that only last 5-10 minutes to relate problems and status reports from those leaving to those coming on. Stand up gatherings can work well for many types of meetings.
- ✦ As Focused as Possible – It takes time for people to get on track and the more often you “jump tracks” the more time is spent in gaining momentum again. Keep the meeting focused on what is important and stick to it. Keep everyone’s nose to the grindstone by recapping discussions, asking questions and letting everyone know you want their input to be concise. You may want to use a white board if you are brainstorming.
- ✦ Tip: Don’t let one person dominate the discussions or go on and on. Solicit people’s opinions who are not contributing and don’t hesitate to creatively interrupt those that aren’t getting to their point by saying something like, “How would you summarize what you are saying in one sentence?” If a person is a perennial problem, meet with them between meetings to constructively discuss how they can better contribute.

## The Art of Running a Meeting (Part 2) - Section I: Planning/Administration

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There is more to the art of running a good meeting than these four principles. You can take some very practical steps to make your meetings run better. Here is what I recommend:

1. Prepare For It – Clearly communicate what issues are being covered in the meeting, where it will be held and how long it is expected to last. Send background materials, handouts, previous minutes and other materials as far in advance as possible. Include an itemized draft agenda and solicit other items that they may want to include. Ask each participant to review all materials before the meeting begins. Don't forget to ask for prayer if major changes or new endeavors are being considered.

Preparation may also include pre-meeting discussions with important stakeholders to uncover issues that need to be addressed or to get buy in from an influential attendee.

- ⬆ **Tip:** Don't use valuable meeting time to report individual attendee's activities. Before our monthly senior staff meeting, each person can circulate a one to two page status report on their area of responsibilities that answers three simple questions – *Your Progress? Your Problems? Your Plans?* Each staff member is expected to review those before the meeting. That way we can focus our meeting on problem solving, coordination of efforts and envisioning.
- ⬆ Organize It – Agendas are a crucial roadmap to success. Start out with prayer, approve the minutes if you have them from the last meeting and then approve the agenda. Follow this with "Old Business", which are items you have previously dealt with. This may be unfinished business or a report on the results of a decision made. Follow this with "New Business" – new things that are being brought up for the first time. Add a section for "AOB" – "Any Other Business" where last minute items can be addressed. These should be rare if you have organized and prepared well.
- ⬆ **Tip:** In my senior staff meetings, I always add a section to the agenda for "Discussion" and include items there that need envisioning, long range planning or a broad overview of effectiveness. I don't want to get so involved in details in meetings that we don't take time to look at the big picture. It is dangerous to be so close to the trees that you can't see the forest. Discussion is the time for broad questions like: *What is the reputation of our medical ministry? How can we improve staff morale or If we were starting this area of ministry over again, what would we do differently?*
- ⬆ Time It – If you are having a longer meeting like a board meeting or have a history of not getting done within the time limits you have announced, time each item on your agenda. This gives you early warning that you are behind and encouragement if you are ahead. It helps keep the leader on track and attendees focused on moving forward.
- ⬆ **Tip:** If you are having problems projecting accurate times, have your meeting secretary note for you how much time is being used on each agenda item. Set down with this after the meeting and if you went overtime was it because you didn't move things along well or you projected too little time? That will help you to do better next time around. If you don't allow adequate time for discussion, your attendees will get frustrated.
- ⬆ **Tip:** Use committees to save time if there is a large agenda like at a board meeting. Put board members on committees where they can use their expertise and have them meet before the general meeting. For example, you may have a Finance Committee, Governance Committee (to deal with bylaws, board policy manual, trustee selection and evaluation) and a Strategic Planning Committee. Each committee needs a staff assigned to assist them. Committees make recommendations to the board and do the board's work. Board committees have no control over their staff. You can also assign smaller task forces or ad hoc committees to bring recommendations to a staff group.
- ⬆ Control It – Good meeting leaders encourage the airing of different viewpoints and healthy debate. You want to have your organizational wagon pulled by spirited horses, but you can't let them run out of control. Step in quickly to quell personal attacks, manage negative conflict, to identify areas of commonality and to make sure issues are resolved. Make it known that you welcome freewheeling discussion but once a decision is made, each team member is expected to support it. It is divisive for a board or staff member to leave a meeting and start politicking their own personal position with others. It is even worst to break confidentiality. If you are discussing confidential matters, let everyone know what they are and that they should not be discussed with others.

- ⤴ **Tip:** Try to get as much consensus on important decisions as possible but take formal votes if you are having formal board or similar meetings. If everyone has to agree for a decision to be made, then an individual member can veto any decision. That is not healthy and can incapacitate progress. It is also not healthy to move forward if a board is seriously divided on an important issue. You may need to step in and table the item. Collect more information if needed or ask people to pray about the issue before the next meeting.
- ⤴ **Document It** – The more complex or long the meeting, the more you need formal minutes. They remind you of the decisions made, serve as an official record and are a starting point for the next meeting. They are very useful to give to those that weren't able to attend, but who need to know what occurred.
  - ⤴ **Tip:** Review the minutes of the meeting before they are circulated. Your minute taker may have misunderstood something, give something more prominence than it deserved or explained something poorly. You can correct the minutes before they are circulated. For groups that have fiduciary responsibilities like a hospital board, the minutes are legal documents and need to be signed and kept in a secure place.
  - ⤴ **Tip:** For official minutes, I like to use a readily understood numbering system. For example the first minute may be 9/3/11–1 *New Hospital Ward*. The numbers denote the meeting of the ninth day of March 2011 and this is the first minute of that meeting. When you are doing old business, you can add after the minute title, (Ref: 16/11/10 -5). That means to find the old minute on this topic refer to the fifth minute of the November 16, 2010 meeting.
- ⤴ **Summarize It** – Take a few minutes at the end of the meeting to summarize decisions, assignments that have been given and the things that are going to require more discussion. This makes sure everyone heard the same thing and you are going to move forward. The most common critique of meetings are, “they lasted too long”, and next is “they didn't accomplish anything.” Meetings are a waste of time if they don't contribute to progress. Summarizing emphasizes what has been accomplished and makes sure momentum is maintained.
  - ⤴ **Tip:** It is a good practice to pull out “Action Items” from the minutes and restate them at their conclusion. Make sure these action items note who has the responsibility to take action and when that action must be accomplished.

Okay, meetings aren't “evil” and there is a place for them. They can only be great meetings if you master leading them to produce significant results in a reasonable amount of time. If you apply these principles and practical steps, you can be a “Master of the Art of Leading a Meeting.”