

## Facilitating Effective Health Services Integration Meetings Tool

### **Description:**

This tool provides guidelines for conducting effective meetings, a checklist to help keep the meeting focussed, and offers a sample meeting evaluation form for participants.

### **How it can be used:**

Meetings to discuss health service integration initiatives involve participants from a variety of stakeholder organizations and their approaches to meetings may be different. All participants can use this tool to work on a common approach when preparing for and holding meetings.

Meetings are essential, however often they end up with participants frustrated because they can be held without proper preparation, no agenda, conducted with a lack focus, no conclusion reached and the proceedings not properly documented.

On the assumption that the meeting is really necessary to achieve the group's purpose and outcomes, follow the key guidelines, focus suggestions, and evaluation tips to ensure that your meetings are effective by having materials prepared in advanced, and that the objectives of the meeting are met through a focused approach.

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### **Guidelines to Conducting an Effective Meeting**

#### ***Prepare for the Meeting***

- Decide on the purpose of the meeting. What do you (the group) expect to accomplish and what are the measurable outcomes?
- Determine who needs to attend the meeting. Include only those that are necessary. If someone needs to be present for a brief period, try to position them right before a break, so they can participate/present and then break from the group. If all participants are not required for most of the agenda items, consider having multiple meetings to make use of peoples' time more effectively. It is better to have a few people attend multiple meetings than to have a number of people sit through agenda items in which they have little interest.
- Determine the length of the meeting. Try set aside as much time as you need.
- Find a location and set the time for the meeting. For some groups, it is useful to set a regular time and place to meet that satisfies everyone's schedule, then cancel the meeting if there is no need to get together. When schedules are tight, working lunches are sometimes the easiest way to get together.
- Prepare and distribute an agenda. Follow up items from previous agenda; request agenda items from participants; assign time limits; ensure action items will be reported upon by the responsible participant; collect accompanying and background documents; distribute agenda and accompanying documents well in advance so participants can arrive prepared; bring extra hard copies to meeting (just in case some forget to bring theirs).

#### **Group practices**

- Agree on group 'norms' or practices. Is there a penalty for consistently showing up late? Is there a process to ensure that everyone gets 'air time'? Agree that interruptions will not be tolerated; does your community or health centre have a practice that will support this, such as the talking stick or speaking stone? All comments are directed toward the project and do not attack the people involved in the project.
- Ensure that the Chairperson/Co-chairs is/are prepared. Do they approve the agenda? Do they vote? Are they leading the discussion or is there a facilitator? Is this a rotating position?

- Ensure the note-taker is present. Who is responsible? What is the turnaround time? And how they will be disseminated (e.g., email, online communal space, posted in public space, etc.)?
- Determine how discussions not on topic will be addressed. Park them and address at end of meeting if there's time; add them to the agenda of a future meeting; or hold a separate meeting.
- The Chairperson or facilitator should arrive early to ensure that the room is set up, the technology is functioning, supplies are available, etc.

### **Hold the Meeting**

- Begin the meeting with introductions. This will 'take attendance' and ensure participants are familiar with each other.
- Review the minutes of the previous meeting. Meeting participants should come to the meeting having read the minutes of the previous meeting. Only items that there is disagreement about as to whether or not they have been accurately recorded, are to be briefly discussed and updated.
- Review the agenda. Additional agenda items can be put forward only if they are relevant to the meeting and there is time available, or if the team agrees they should take precedence over another agenda item that can be deferred.
- Review the purpose of the meeting. The chairperson should review the purpose of the meeting, expected outcomes and a reminder of meeting policies, if necessary.
- Stick to the agenda – topic and time.
- Ensure notes are being taken. One person should be responsible for keeping meeting minutes. The meeting summary should not detail entire conversations but should record decisions along with any action items (What needs to be done? Who is responsible? When is it to be done?). Individuals should maintain their own records of the meeting, including actions assigned to them.
- Defer items that can't be addressed. If it is found during the course of a meeting that an item cannot be dealt with because of lack of information or the right individuals are not present, don't waste time on that item. Instead, defer the agenda item to a meeting when it can be adequately addressed. Make sure an action reminder is in place to prevent the same item from being deferred repeatedly.
- Set the agenda for the next meeting. Include the purpose and objectives of the meeting as well as a time to meet. Any unfinished business from the current meeting should be noted.
- Review the action items. Be clear that there is someone responsible for each action item and that there are timelines associated with it.
- Evaluate the meeting – briefly discuss if the meeting addressed the intended purpose and objectives, and if not, why? This may also be accomplished through a 'Round Table' exercise where each participant gets a chance to share their experience of the meeting.

### **After the Meeting**

- Prepare and distribute the minutes, Following the agreed-upon schedule, include any further documentation that was provided during the meeting (e.g., PowerPoint presentations, additional reports, etc.).
- Thank any guests who participated in the meeting.

### **Meeting Focus Suggestions**

Use the suggested responses to help keep your meetings focused and on track.

<b>The Situation</b>	<b>Suggested Response</b>
Need to test for consensus	<i>"Do we all agree that ...?"</i>
Need to move ahead	<i>"As I see it, we should ...?"</i>
Need to solve a problem	<i>"Why don't we list the options ...?"</i>
Need to focus on outcomes	<i>"There are a lot of issues we could discuss. Today we need to focus on ..."</i>
Need to bring the group together	<i>"Let's take five minutes and begin by sharing any breakthroughs since our last meeting"</i>
Need to summarize and move on	<i>"We have talked about ..."</i>
Need to clear confusion	<i>"Does anyone know why ...?"</i>
Need increased participation	<i>"I suggest each participant should indicate what they ..."</i>
Need to use a process	<i>"What is the process we are using?"</i>
Need to diffuse friction	<i>"Can we handle this discussion another way?"</i>
Need to understand the conflict	<i>"What is the issue here?"</i>
Need to come back to the agenda	<i>"That is interesting, but our objective is ..."</i>
Need to deal with participants who arrive late	Don't hold up the meeting for them. <i>"Could someone please fill them in later?"</i>
Need to stop a 'rambler' or someone who monopolizes the discussion	Catch one of their phrases and say <i>"Why don't we look at ...?"</i>
Need to establish common ground	<i>"What do we agree on?"</i>
Need to confirm understanding	<i>"I heard you say ..., do I have that right?"</i>
Need to stop a stubborn director/leader	<i>"Does anyone else feel that way? Do we need to talk about it?"</i>

### **Meeting Evaluation Tips**

Allow enough time on the agenda so that participants can reflect on the meeting. Ask each participant to respond to the following questions:

1. Did we accomplish what we set out to do with the agenda?
2. Was the meeting positive and respectful, and was everyone able to participate effectively?
3. Did we make good use of our time and was the meeting focused?
4. How could we have improved the meeting?