

Team Building Leading Effective Team Meetings

Suggested Lesson Plan

Objectives:

Upon completion, participants will be able to:

- identify the key principles and characteristics of effective interprofessional team meetings
- discuss strategies for addressing dysfunctional teamwork behaviours and improving interprofessional team meetings

Activity: Observation, reflection and discussion of Video Scenarios

Time: 90 minutes

Material: Power Point Slides, Computer and Projector Equipment, TV & VCR, Flip Chart; Participant Handouts

Procedure:

- Highlight the importance of team meetings as a key means for fostering interprofessional teamwork.
- Ask participants:
 - “Why are interprofessional team meetings important to the team process and in fostering collaborative practice?”
 - “What have been your positive or negative experiences with team meetings?”
 - “What strategies have you used for addressing dysfunctional team behaviours?”
- Record points on a flip chart.
- Present Power Point slides and review and discuss the handouts: ‘Interprofessional Team Meetings’, ‘Principles of Effective Team Meetings’, ‘The Seven-Step Meeting Process’ and ‘Evaluating the Team Process’. (15 to 30 minutes)

Interprofessional Health Care Team Meetings - Video Scenarios

- Introduce the ‘Video Scenarios’ as an activity for participants to observe and critique simulated interprofessional health care team meetings. Each video provides examples of effective and ineffective behaviors and processes for interprofessional health care team meetings.
- There are five (5) different video scenarios to select for presentation depending on the time available. Approximately 20 minutes should be allotted for viewing and discussing each scenario. The following table

identifies the general characteristics of each scenario. The selection of video scenarios for particular training sessions should be based on the background characteristics of the participants, their health care context, and a review of the scripts for each scenario.

Scenario	Patient Type	Ineffective Team Meeting Characteristics	Effective Team Meeting Characteristics	Cultural Diversity
Mrs. Hynes	Elderly	X		
Mrs. Hong	Elderly	X		X (Patient)
Mr. Keough Version 1	Adult	X		
Mr. Keough Version 2	Adult		X	X (Providers)
Jessica Parsons	Adolescent		X	X (Providers)

- Play each video scenario you have selected and stop the video tape after each scenario has finished to lead a discussion with participants. Participants are to record their personal observations of each scenario on the worksheet.. Allow approximately 3 to 5 minutes after each scenario for participants to finish recording their observations. (45 – 60 minutes for 3 scenarios)
- Lead a discussion on the following for each video scenario:

Team Dynamics

1. Ask the participants to select a number on a scale of 1-10 (1 is HIGHLY INEFFECTIVE, 10 is HIGHLY EFFECTIVE), that best represents their perception of the team's functioning.
2. Ask the participants to identify specific effective and ineffective behaviors they observed in the team meeting. Ask them to be as concrete as possible. For example, a correct answer would be, "the (health professional) disrupted the meeting when she arrived last" rather than "the (health professional) disrupted the meeting." They can consider skills in the following areas: running meetings, leadership, communication, conflict management, recognition of other team members, etc.
3. Ask the participants to identify three different ways they would have responded to these ineffective behaviors.

Team Effectiveness

1. Ask the participants to select a number on a scale of 1-10 (1 is NOT AT ALL VALUABLE, 10 is VERY VALUABLE), which best represents their judgement

of how valuable the team meeting was in establishing or improving the care plan for the patient?

2. Ask the participants to give three different reasons why they circled the number they did in Question 4.

Interprofessional Team Meetings¹

Managing the team meeting process is an important activity and aspect of any interprofessional health care team. The team leader, coordinator or facilitator is responsible for moving the team efficiently through the process of the team meeting. Some teams rotate this leadership responsibility to foster shared leadership.

What are the meeting responsibilities of the team leader, coordinator/facilitator?

- Schedules, arranges, and conducts the meeting.
- Prepares and distributes agenda before the meeting and ensures that agenda is followed during the meeting.
- Clarifies purpose and helps the team identify goals.
- Encourages everyone to participate throughout the discussion.
- Summarizes and organizes the ideas discussed to gain commitment (with help of recorder).
- Identifies common topics or subjects in discussion to maintain direction of discussion.
- Asks questions to clarify comments and restates if members are confused.
- Encourages team to finish each agenda item before moving on to the next.
- Encourages the integration of new members.

Another important role is that of the recorder. The recorder has four major tasks during meetings, including:

- Documenting the efforts of the group, including summaries of decisions, action items (or assigned tasks), and deadlines.
- Maintaining the group's focus and direction.
- Actively clarifying the group's progress by using strategies such as summarizing and seeking.
- Producing written summaries.

Responsibilities of the team timekeeper include:

- Informing the group of the beginning time and ending time, allowing enough time for the members to begin and come to an end to the discussion.
- Indicating when the group is using more time than available on one issue and remind them of the number of tasks and time remaining.
- Helping the team use its time on issues on which the whole team is needed.

¹ Hyer, K., Flaherty, E., Fairchild, S., Bottrell, M., Mezey, M., Fulmer, T., et al. (Eds.). (2003). *Geriatric Interdisciplinary Team Training: The GITT Kit* (2nd ed.). New York: John A. Hartford Foundation, Inc.

Techniques for Facilitating a Meeting

Facilitator Roles	Dialogue Examples
1. Get the meeting started.	“Today we need to review__ patients. Are there any urgent concerns?”
2. Encourage communication and involvement of all members.	“What are the rehabilitation needs you see?”
3. Ask team members for opinions and feelings to encourage discussion.	“What is your view of the family’s request?”
4. Ask for a summary of the discussion.	“What are the care plan goals we have agreed upon? Can someone summarize?”
5. Paraphrase what someone has said to help members understand each other.	“Are you saying that we need more information on liver function?”
6. Ask for specific examples to improve understanding.	“Please give some examples.”
7. Clarify assumptions.	“Your recommendation assumes that the patient is too confused to make an independent decision.”
8. Ask for explanation in order to eliminate confusion and repetition.	“We keep avoiding a plan for this. Can someone suggest how we should proceed?”
9. Probe an idea in greater depth.	“What are other ways to help Mrs. S stay at home?”
10. Suggest a break or rest.	“Let’s take a brief break.”
11. Move the team toward an action.	“What should we do first?”

Principles of Effective Team Meetings²

A key principle for effective team meetings is “structure”. This refers to how the meeting is organized and conducted. Structure should encourage more efficient and effective meetings. The key elements of a structured meeting are:

- Agenda (what do we expect to accomplish?)
- Estimated timeline for completing agenda (reasonable time frames).
- Establishment of roles at meeting. Members can and should rotate the following roles but every meeting should include:
 - Leader (calls meeting to order, has agenda, sets expectations).
 - Timekeeper (keeps group on task).
 - Recorder (keeps track of agreements about the care plan and modifications, and is responsible for recording changes to care plan).
- Summary of agreements (recorder reports agreements).
- Evaluation/reflection on team process (both team process and outcome of the meeting are discussed).

² Hyer et al. (2003).

The Seven-Step Meeting Process³

The Seven-Step Meeting Process is a defined meeting process that standardizes the method of conducting a meeting and assists in the effective execution of critical meeting tasks. Not only do these seven steps help in structuring a meeting, they also help teams review and assess their efficiency and productivity.

Step 1 Clarify Objectives

Ensure that all understand and are in agreement with the meeting objectives.

Step 2 Review Roles

Review who will be timekeeper, recorder, leader, and facilitator. Decide at what intervals feedback on time will be given.

Step 3 Review Agenda

Review details of agenda items listed under step 4. Ensure that all team members understand and are in agreement with the agenda items.

Step 4 Work Through Agenda Items

Step 5 Review Meeting Record

Review the flipchart record on the walls but do not read all charts. Look for changes and additions. Decide which charts should be kept and which should be discarded.

Step 6 Plan Next Steps and Next Meeting Agenda

Decide who will do what before the next meeting. Decide what the objectives and agenda items will be for the next meeting.

Step 7 Evaluate Meeting

What did the team do well that it should continue doing? What could the team do differently to improve the meeting, group, and continual improvement processes?

³ Hyer et al. (2003).

Evaluating Team Process⁴

Participation

- Did each team member adequately participate in the discussion, contribute ideas to the problem? to the care plan?
- Did members express themselves clearly? Address the point at hand?
- Did members follow-up/ask for clarification on vague comments or positions by others?
- Did the team process business in a way that allowed each member to contribute his or her viewpoint/role?
- Was there leadership to create the necessary structure and organization for the team to complete its business?
- Was there adequate leadership for creating challenging and analyzing ideas?

Conflict

- Did conflict or disagreement occur? Should there have been conflict? If so, why didn't it occur?
- When conflict or disagreement occurred:
 - Did some members dominate, push their ideas on others?
 - Did some members withdraw, fail to voice their position?
 - Did the team know how to reach an agreement?
 - Did the team move too quickly in reaching an agreement?
- Which of the following styles of dealing with conflict were used?
 - Withdrawal/avoidance
 - Competition
 - Accommodation
 - Compromise

⁴ Hyer et al. (2003).

Leading Effective Team Meetings Observer Worksheet

Team Dynamics

On a scale of 1-10 (1 is HIGHLY INEFFECTIVE, 10 is HIGHLY EFFECTIVE) how effective was this team's functioning?

Highly Ineffective										Highly Effective
1	2	3	4	5	6	7	8	9	10	

What were the specific effective and ineffective behaviors you observed? Be as concrete as possible. For example, a correct answer would be, "the (health professional) disrupted the meeting when she arrived last". You may want to consider skills in the following area: running meetings, leadership, communication, conflict management, recognition of other team members, etc.

List three different ways you would have responded to these ineffective behaviors.

1. _____
2. _____
3. _____

Team Effectiveness

On a scale of 1-10 (1 is NOT AT ALL VALUABLE , 10 is VERY VALUABLE) how valuable was the team meeting in establishing or improving the care plan for the patient?

Not at all valuable										Very Valuable
1	2	3	4	5	6	7	8	9	10	

Give three different reasons why you circled the number you did?

1. _____
2. _____
3. _____