Meetings

1 The function of meetings

The functions of meetings can be divided into two loose and overlapping groups, the overt and the hidden. The hidden functions are in many respects the more important: if ignored, they can seriously undermine the overt functions.

1.1 Overt functions

To share knowledge
Not simply facts and 'tabled information'. Immediately before and after the meeting are valuable times for informal sharing of information.

To process information and problem solve
The combined knowledge, experience, judgement and imagination of a group is often more than the sum of its parts for problem solving and creative work: 'the social mind'. The meeting also decides what is important and what is not.

Complex tasks or documents can benefit from being brought to a meeting more than once.

To make decisions and set goals: the executive function
After the group has decided what should be done, they need to decide on how. This *can* be done outside a meeting but is often better done in a meeting as (apart from the group problem solving advantages) it can allow people to see how their role dovetails with the roles of other people. It can also be important to build consent before the group move to action.

To control quality
Items of work brought to meetings are subject to scrutiny by other members of the meeting. This is an important secondary role of CPA (Care Programme Approach) meetings.

To elicit commitment
Depending on the type of meeting and its members, after a decision has been made, all members of the group are expected to sign up to it even if they argued against it in the first place. Most people will accept this so long as they feel their views have had a fair hearing.

To influence management
Decisions made in meetings will often carry greater weight than decisions of individuals when passed up the command chain.

1.2 Hidden functions

To contain anxiety
A secondary consequence of some of the other features of meetings is to hold and contain anxiety. If members of the group have difficult tasks, getting the views of the group on how to achieve these can be helpful in reducing anxiety; similarly, having the backing of the meeting can be helpful for individuals faced with difficult or unpopular tasks. Ventilation of feelings can be a worthwhile use of time.

To define the group
Including reaffirming and redefining group aims, and how the work of the individual relates to these aims. Membership of the group is inevitably partially defined in terms of non-membership: groups identify themselves in opposition to non-members (e.g. other teams or professional groups) who may be denigrated in comparison.

Clashes of values may present as interpersonal tensions if the group is working to redefine itself.

Meetings are a powerful medium for transmitting group culture, typically in activities that seem superficially peripheral to the task – such as the stories and anecdotes that may be told in the course of the meeting, the way the meeting is organised or even the way that refreshments are provided.

As an arena to play out roles

This can be both good and bad. It may be the principle opportunity a team leader has to appropriately assert his/her authority as leader as opposed to simply being a team member. However, meetings are also opportunities to play out competitive/hierarchical concerns. Although this can be destructive, it is to a certain extent inevitable and needs to be acknowledged and contained.

The way that roles get played out can reflect hidden conflicts over goals and values, but can get expressed in inter-personal terms. Differences in goals and values are usually easer to manage if brought into the open.

2 Types of meetings

2.1 Size

Large (>100) meetings mean that most people only get to listen to the key presenters. Medium sized meetings (40-50) allow some questions and interactivity but little real discussion. Small meetings (up to 12) are best for people contributing equally under the guidance of a chairman. Productivity falls off sharply if the meeting has more than 12 members.

If a group is getting too big, try to secure the consent of people to stay away. This can be facilitated by circulating an agenda and minutes more widely than the core meeting group and inviting non-attenders to make contributions on items they feel strongly about. Failing that, try to structure the meeting so some people can leave early and/or others can arrive late. Think about breaking the meeting into smaller meetings, or using sub-committees who can do some work in advance. Scheduling guests can also be good for moving a meeting on: *so, now Paul's arrived we can move on to...*

2.2 Frequency

The frequency of the meeting will have a major determining factor on the unity of the group. Daily meetings (e.g. ward handovers) are typically groups of people working on the same project with a common objective and reaching decisions informally, consensually and with a flat hierarchy. The meeting is an important indicator of the values and health of the group, and may also be a key point for intervening in the culture of the group (e.g. if the team is struggling or there are performance issues). These meetings are brief and *tend* to have better communication as members have extensive experience of working with each other and can often use a group shorthand to communicate a lot of information concisely. If this isn't happening and handovers seem to take longer than they should, it *can* be a sign that all is not well in the group, particularly around issues of communication.

Weekly, monthly or *ad hoc* meetings (e.g. medical staff committee meetings) typically have members working on different/parallel projects. Members may not meet outside the forum of the meeting. There may be a competitive element and the chairman may need to exert more formal control. Group dynamic effects are more likely to reduce the effectiveness of this kind of meeting. When these meetings go wrong, the destructive potential is large as they tend to involve more senior people.

3 Before and after the meeting

3.1 Do we need a meeting?

Meetings are expensive interventions when the combined hourly salaries of everyone in the room are taken into account. Simply providing information can often be done more simply by post or email. Basic information processing and decision making can also be done by email, though this is rarely as satisfactory as face to face discussion: if in doubt, take it to a meeting rather than simply circulating it. If disagreement does appear in an email discussion, stop it and deal with the discussion by phone or by arranging a meeting.

As a rule of thumb, a meeting is more likely to be necessary when meeting functions further down the function list (above) predominate.

3.2 Before the meeting

The choice of venue for the meeting is not simply a matter of choosing somewhere convenient: it may bring out dynamics from the 'hidden' functions of a meeting. Choose carefully bearing in mind the symbolic resonances of the venue.

If you need projectors or flip-charts, make sure they are available.

Invite the people that need to be there. This is harder than it seems: not just the right people for their organisational roles but also a mixture of personality types. Bear in mind that influential people in an organisation are not always in positions that formalise their influence.

Agendas are often too brief and vague and don't allow people to prepare for meetings. An agenda is a 'to do' list for the meeting: don't be afraid of a longer agenda if it allows people to come to meetings better prepared. A detailed agenda is also important if it is to be circulated beyond the core attendees of the meeting. Build sufficient time in for the work

that is to be done. The agenda is also a standard by which the meeting's success can be measured (and can provide a sense of achievement when everything is ticked off).

Agendas also function to engage with secondary meeting functions: they are a script for providing order and control when emotions are running high.

Circulate the agenda around three days in advance. Circulating other documents with the agenda is fine, but they shouldn't be long documents. If possible, the agenda should guide attention to key points in longer documents.

It can be helpful for a chairman to categorise each agenda item to clarify the role of that part of the meeting: see section 1. You may want to partially share this on the agenda, e.g. marking items for information/discussion/decision.

3.3 After the meeting

Minutes should include time, date and location of the meeting; names of all present and apologies for absence; all agenda items discussed and all decisions reached. If action was agreed on record the name of the person responsible for the action. Include the time and date of the next meeting. Usually minutes will reflect a debate but don't name people on particular sides. In general, minutes should be short, with the emphasis on action points (including who is responsible for the point and a deadline).

If possible, evaluate the meeting.

4 Chairing the meeting

4.1 General approach

The chair should be the meeting's servant, not its master. Attending to process issues within the meeting is the key skill, which inevitably means that there is sometimes a conflict for the chair between putting across his/her own view and attending to the health of the meeting: it can be difficult to attend to process in a meeting while simultaneously trying to make a particular point. Important process skills are interpretation, reflection, clarification, summarising and consensus building: i.e., demonstrating commitment to the group. Periodically, it can be helpful to check in with the attendees to make sure they are happy with your approach: *what do you need from me as a chair? How am I doing - do you need me to be doing something different for the meeting to work better? What should I keep/stop/start doing?*

Open questions to the whole group are less useful for telephone meetings where eye contact and body language are unavailable. Directing questions to particular members by name in turn is often more productive.

A chairman who demonstrates attention to process ahead of his/her own goals often finds it easier to control a meeting than one who attempt to impose their own objectives. If a chairman has a particular point of view he/she wants heard, it can be a useful tactic to delegate the function of proposing this to someone else in order to stay on task chairing the meeting. The function of chairing the meeting is usually more important than the chairman's view of the particular point at issue.

The chair may also be the face of the group in other arenas, which can be groups of their own demanding loyalty from the chair. These can be difficult conflicting demands at times.

4.2 Practicalities

Get to the venue early so that you can greet people (preferably by name) as they arrive. The time at the beginning and end of meetings is often a very productive time, both as a social buffer but also for important informal conversations that never make it into the minutes. Start the meeting on time. Think about recording people's arrival time in the minutes of the discussion: this has the dual purpose of pointing out who was present and absent at a particular point in the discussion, but publishing tardiness in minutes is also a useful spur to punctuality. Don't recap for latecomers. Thank people for their contribution, either during the meeting or at its end.

Think about a phone call to people ahead of the meeting to avoid discussion of a potentially time wasting point, or to ensure that a point comes from the floor and not from the chair. This is also important to verify that particular people have prepared for their part of the meeting.

Booking the room and making sure minutes are taken and distributed are the chairman's responsibilities, even if they are usually delegated.

Meetings conducted as conference calls can be difficult because the important social buffer at the start of the meeting can be lost: people come on line at the appointed time and go straight into the agenda. Think about building in ten minutes of check in time with people to ask how they are or how they are feeling about being at the meeting.

4.3 Process

Protecting the unconfident
If stronger members of the group seem to be trampling on the sensibilities of less confident or more junior members, make sure to affirm the latter's contribution, perhaps referring to it again later in the meeting or noting the point in the minutes.

Encourage the clash of ideas…
…but not the clash of personalities. If it starts to get heated, bring a neutral into the discussion (preferably on a purely factual point). If possible, move from clashing personalities to differing positions. Summarise each position accurately, so that both sides of the argument feel heard. If necessary explicitly unpick the disagreement further to reveal the underlying prioritisation of different values.

Curbing the garrulous
If someone is taking a long time, suggest it might be more useful to write a briefing paper; or pick on a phrase and give it to someone else for comment. If this is a persistent problem and one person is dominating the meeting, use a 'round robin': go round the table and give each person two minutes to speak on the issue; summarise; go round again giving each person 30 seconds having heard the rest of the group; summarise; if there is no consensus, move to a vote.

Drawing out the silent
Introverted members of the group may not contribute, particularly if there are several extravert group members enjoying a lively discussion. Draw out their ideas with care: while the extraverts may be happy to have other people pick up their half-formed ideas and run with them in a different direction, the introverts will tend to have thought their position through with care before speaking and may not like having them treated simply as a springboard for another extravert idea shower.

Different members of the meeting may play different roles, all of which can be valuable: movers, directors, summarisers, harmonisers, sociables...

Don't reject suggestions
Creativity works by generating solutions (whilst holding back on judgement), then evaluating the solutions. Premature judgement can preclude real creative thinking.

Come to the senior people last
This is less inhibiting for the juniors, and can produce a better variety of ideas. But make sure you limit the contributions of juniors to their expertise.

Difficult decisions
Consensus decisions are stronger than imposed decisions; democratic decisions come in the middle. Use this knowledge: aim for consensus; if it is not reached guillotine the discussion with 'I'm going to let this discussion run for ten more minutes than I'm going to move to a vote'; if the vote is split, use your vote as chairman to make the decision. An alternative strategy (to be used sparingly) is to employ delay, particularly if moving to a vote may seem to risk crystallising divisions in the group.

Trouble makers
As a rule, a healthy approach to people you catch yourself regarding as trouble makers is to try to think of them as allies, doing their best to spot the flaws in your ideas now so that you avoid embarrassment later. Nevertheless, a minority of people will be consistently destructive of a meeting's productivity. This is a difficult problem and you may need to elicit help (e.g. from your manager) in either setting some stricter boundaries or moving them out of the meeting.

5 Ward rounds and care programme meetings

Ward rounds and CPA meetings can be particularly stressful meetings for those chairing them. There is a difficult transition from being a CT1-3 to ST4-6 as leading these meetings becomes a more frequent part of the job. Ward rounds in contemporary in patient units often have multiple demands made on them, sometimes quite forcefully, from staff wanting the most acutely ill patients seen immediately and bed managers wanting the least ill discharged, to distressed relatives wanting an update on their loved ones.

The key skill here is to make the transition from managing the patient to leading and facilitating the meeting. If you treat your job in a ward round as managing the patient, you put yourself under great pressure both to find the perfect solution and also to sell it to the other people in the room (this is often a difficult transition because fresh from exams, a junior doctor may be keen to apply clinical knowledge).

Much better to leverage the skill of other people in the room to maximise the set of possible solutions and in doing so move towards consensus. The more difficult the problem, the more important it is to take time with process issues in the ward round: to a certain extent, if you look after the process, the content will look after itself.

Structuring a ward round
Use a modified form of the agenda setting techniques that are used in talking to patients. Begin each ward round with a few minutes to plan the round and balance out the competing demands on the time of the round. While planning, don't

get into the content: just get enough information to work out a running order and rough timings. This will ensure you use your limited time where it is most needed and will contain anxiety in staff who now know when their most demanding patients will be seen.

Problem solving in a ward round
Ward rounds will often throw up tricky dilemmas. Leverage all the knowledge and all the expertise in the room.

•As in the clinical interview, keep the reins on your own expertise until the right time to use it. Go round the room and ask people for their opinions, starting with the most junior person in the room. Often, students spend more time with patients than anyone else and may have information that no-one else has. At the very least, taking the time to hear all the opinions will give you time to think: more often, somebody will have information that is new to you or an approach you wouldn't have thought of. Use reflective listening to check with each person individually that you have completely understood their perspective. Don't evaluate or criticise ideas at this point, but do make it very clear that you expect ward staff (both your own juniors and nursing staff) to have done their preparation before the ward round. They are your eyes and ears.

•Summarise all the options, adding in any of your own without privileging them.

•Evaluate the options as a group. Sometimes one member of the group may be particularly set on one course of action and can be blind to other options. Consider inviting that person to list the benefits of their least favoured option, then asking someone else to summarise their position, as a way of building the capacity of the group to think divergently and tolerate different opinions.

•Use circular questioning to bring out differences without taking sides by asking people to comment on each other's perspectives. e.g J*ane thinks we should discharge her today. What do you think Graham?.* Circular questioning doesn't have to be restricted to the people in the room. Ask someone to imagine what the reaction of a key absent person in the system might be to a particular course of action e.g *what do you think her husband would say if we sent her home today?*

•Guide the process of decision making through to a conclusion. Summarise and check understanding. Make sure all members of the ward round are signed up. If there is discontent, use reflective listening statements to bring out why that individual disagrees with the plan: bear in mind this person may be stopping you making a mistake, so hear them out.

•Careful problems solving involving everyone in the room has the additional benefit of getting full multi-professional sign up to the decision that is made. When the decision is one of positive risk taking, a strong consensus will be a powerful tool in containing anxiety about the decision.

Discharge planning meetings
Discharge programme meetings are different to ward rounds in that generally (not always), decision making is not the leading function. Discharge meetings rarely elicit new information or major changes to the plan of care: they function as almost as a ritual affirmation of a plan that should have largely already been decided. Although the formal content of the care plan is important, the liminal element should not be rushed: they are an important right of passage for patients back into the community, and the work of the meeting is in both acknowledging this difficult transition and recognising - even celebrating - the progress made in hospital. A well crafted care plan can act both as a real guide to future action but also as a transitional object for the patient to re-connect with carers in their absence.

6 References

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