Establishing an Effective Team and Leading Productive Team Meetings

1. Identify the Team

A team meeting with 2 to 12 people will be most productive. A team can consist of physicians, nurses, medical office assistant and receptionists. Depending on how your practice operates, the team might include just yourself and your staff or be a clinic-wide team. Team meetings are information sharing and problem-solving sessions. Ideally the team should consist of the people who are working directly with patients.

2. Set a consistent meeting time

Establishing a regular meeting time and date during the workday is important. Team meetings should not go over 1 hour and can occur weekly or biweekly. Some practices meet before the clinic opens to avoid distractions, the phone is turned off and the doors are closed during the time of the meeting. The purpose of team meetings is to have an opportunity to improve workflows and strengthen team culture.

3. Roles and participation

Discuss how the team will choose a leader and generally how the team process will be led. The individuals and team must take responsibility to encourage equal participation. Assign a different team member to the roles of chair, timekeeper and recorder for each meeting. Clearly communicate expectations, assignments, tasks and roles to each member.

4. Establish ground rules

Setting expectations from the beginning can help create buy-in on team meetings and strengthen teamwork. Here are some examples of ground rules:

1. Raise your hand and be recognized before speaking.
2. Be brief and to the point.
3. Make your point calmly.
4. Keep an open mind.
5. Listen without bias.
6. Understand what is said.
7. Avoid side conversations.
8. Respect other opinions.
9. Avoid personal agendas.
10. Come prepared to do what’s good for the clinic.
11. Have fun.

5. Set a consistent meeting agenda.

Many teams use an agenda template to set a consistent agenda for each meeting. The common standing items include:

1. Check-in (this is a quick opportunity for each team member to share something about their personal life. This helps improve team building)
2. Shout-out (e.g. share positive patient care experiences)
3. Check-back (review action steps from last meeting)
4. New business
5. Education
6. Debrief. Develop action items (who, what, when, how). Summarize the meeting and establish a date and time for follow-up meeting.

Meeting agendas should be available to everyone before meetings to allow team members to add in agenda items. Each agenda item should include the person responsible for leading the discussion and with the time allotted.

6. Examples of Topics for discussion.

Discuss options for improvement focus related to your participation in the Foundations Stream on planning for care of a panel/population of patients. This should include patients who touch the health care system regularly and those who do not. Refer to the PTP Manual for the activities identified in the Foundations stream. These should become part of the team topics for discussion.

7. Record action items, who is responsible and due dates.

Record minutes from each meeting on a standard form and post in an accessible place so team members can reference it in the future. Before concluding each meeting, identify action items, who is responsible, and due dates. At the next meeting, use the check-back to report on the status of each action item and continue to monitor progress.

8. Solve problems as a group and measure progress.

Team meetings are a time for everyone to engage in problem-solving to make their collective work better, not time for leadership to communicate new policies and procedures to staff. Track daily measure that matter to your team. There are many tools that can assist in measuring common clinic problems like process mapping, run charts, PDSA cycles, visualization boards, check sheets, etc. Some key things to remember when measuring your progress:

- What information do you want to collect?
- Who will collect the information?
- From where will the information be gathered from?
- What time period will you use?

This information will help you analyse and interpret your progress. Review the results at your next team meeting and have a discussion on the findings. You should highlight areas of success and problem areas. If there are problem areas, come up with an Action Plan. After a reasonable timeframe, re-collect the data and analyse it to ensure an improvement has occurred.

9. Resources.

Online Publication/Resource	Website
Team Meetings	https://edhub.ama-assn.org/steps-forward/module/2702508
ACTT: Quality Improvement Guide	https://actt.albertadoctors.org/file/quality-improvement-guide.pdf#search=qi%20guide
ACTT: Process Mapping Guide	https://actt.albertadoctors.org/file/2017-dec-pact-box-1-process-map.pdf#search=process%20mapping
ACTT: Sequence to Achieve Change	https://actt.albertadoctors.org/PMH/organized-evidence-based-care/Opioid/PublishingImages/Pages/Sequence-to-Achieve-Change/Sequence-to-Achieve-Change.pdf
Team Meeting Agenda	Available under Capacity for Improvement section of the PTP website: http://grandeprairiepcn.com/practice/foundations/Pages/Foundations%20Resources.aspx
Practice Transformation Program Manual	http://grandeprairiepcn.com/practice/Documents/PTP%20ImplementationManual20200212.pdf
PMH Best Advice Guide: Advance and Meaningful Use of EMRs	https://patientsmedicalhome.ca/resources/best-advice-guides/best-advice-guide-advanced-and-meaningful-use-of-emrs/
ACTT: Guide to Panel Identification	https://top.albertadoctors.org/file/guide-to-panel-identification.pdf
ACTT: STEP Workbook	https://top.albertadoctors.org/file/step-workbook.pdf
ACTT: EMR Guide for PMH	https://top.albertadoctors.org/file/guiding-principles--effective-use-of-emr-for-pmh-work.pdf
HQCA	https://hqca.ca/health-care-provider-resources/panel-reports/about

Adapted from:

https://edhub.ama-assn.org/steps-forward/module/2702508