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Meeting Optimization Program: A “Workshop in a Box” to Create Meetings That Are Transformational Tools for Institutional Change

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Abstract

Introduction: Stemming from an initiative launched at the University of California, San Francisco, School of Medicine’s retreat in 2014, a group of 15 senior faculty and administrators convened to explicitly discuss strategies for creating an institutional culture of leadership. The group agreed to focus on improving a foundational skill involved in almost all leadership activities: running effective meetings. Meetings are necessary to advance institutional vision and growth. Moreover, meetings also can be detrimental if not run effectively, leading to lost productivity and meeting fatigue. **Methods:** A working group developed and disseminated a workshop for learners, faculty, and administrators to create an institutional culture where meetings are interactive and transformational events. The resulting Meeting Optimization Program (MOP) is a 75- to 90-minute workshop that contains the key elements of effective meetings culled from existing literature and resources. MOP includes interactive discussion and a role-play to allow participants to practice effective meeting skills. The toolkit includes a facilitator guideline and a companion checklist of skills and resources. **Results:** Working group members cofacilitated workshops for a variety of divisions across the campus. Participants rated the workshop highly for achieving its goal, for its overall effectiveness, and for the general format. Several participants became facilitators in a modified train-the-trainer model. Feedback highlighted the need for another iteration of the workshop focusing on facilitation. **Discussion:** Creating change in complex systems inevitably involves meetings. Using MOP, institutions can empower their members with the tools to have effective meetings.

Keywords

Communication, Leadership, Management, Faculty Affairs, Group on Faculty Affairs, GFA, Organization and Management, Organization

Appendices

- A. MOP Workshop Agenda .pdf
- B. MOP Effective Meeting Checklist.pdf
- C. MOP Facilitator Guide.pdf
- D. MOP Background and Roles FACULTY.pdf
- E. MOP Background and Roles STAFF.pdf
- F. MOP Background and Roles RESIDENTS.pdf
- G. MOP Evaluation Form.pdf
- H. Table.pdf

All appendices are peer reviewed as integral parts of the Original Publication.

Educational Objectives

By the end of this session, learners will be able to:

1. Evaluate appropriate reasons for setting up a meeting.
2. Describe key steps to effectively prepare for a meeting.
3. Practice critical components of effectively running a meeting.
4. Identify specific action steps to improve meetings in the future.

Introduction

The Meeting Optimization Program (MOP) grew out of the University of California, San Francisco (UCSF), School of Medicine’s Culture of Leadership Initiative with an understanding that meetings are a powerful tool for organizational growth and innovation but are also a tool that many institutions use ineffectively.¹⁻⁴ In particular, competency in participating in or leading effective meetings is not a standard included in health care professional training, although health care professionals and learners participate in and may

lead many meetings. Meeting time studies, which have been conducted since the 1960s, demonstrate that employees are spending increasing amounts of time in meetings,^{4,5} yet approximately 40% of executives report dozing during meetings, and one-third feel meetings are not worth the time.^{4,6} In addition, the number of meetings one attends is associated with increased fatigue and subjective workload.⁷ Meetings are necessary, however, to accomplish goals that an individual cannot achieve by him- or herself.^{1,2} Meetings can serve as instruments for consensus building, problem solving, innovation, and group decision making. Studies show that there are ways in which to conduct meetings that lead to better organizational outcomes and participant satisfaction, such as promoting action-oriented communication over complaints and providing a written agenda in advance of the meeting.^{4,8,9}

MOP is a workshop designed to give faculty, staff, and learners tools to conduct meetings that exert influence and help move an organization forward. MOP's goal is to train individuals how to create inclusive and transformational meetings.

Numerous resources about effective meetings are available on the internet and in literature aimed at health professionals.¹⁰⁻¹⁵ There are also numerous meeting facilitation courses and certificates. We wanted to create a stand-alone, accessible, interactive, and feasible training resource for any individual in our institution. Designing a workshop led by internal faculty and administrators rather than outside consultants creates institutional sustainability and embeds facilitators who inherently understand the institutional culture. Our overall aim was for this workshop to allow participants to have immediate application of, feedback on, and revision of skills and tools with a direct impact on their meeting practice.

Methods

Overview

Given the ubiquitous nature of meetings, our target audience includes all members of the campus, including learners, administrators, and faculty. Recognizing that the majority of participants are experienced in attending and perhaps leading meetings, we designed the workshop to build off of participants' knowledge and experience and to provide learning space to apply, analyze, evaluate, and create, as per Bloom's revised taxonomy.¹⁶ We selected workshop content based on best evidence and applicability and developed a content checklist to ensure the coverage of key take-home points. We also developed a facilitator guide for the role-play.

Our first round of facilitators included members of the workshop development group working in pairs. As demand for the workshop increased, we recruited additional volunteer faculty and staff committed to improving our institution's meeting culture and facilitated a modified train-the-trainer model by pairing a new facilitator with one of the original facilitators for observation and then cofacilitation. Interested participants from the workshops also joined the facilitator pool.

We found that the workshop requires a minimum of 75-90 minutes with a two-person facilitator team, preferably composed of one faculty member and one staff member. The ideal group size is between 10 and 15 participants. The room should have the capacity for participants to arrange themselves as if attending a meeting, although, if in a lecture hall, the setting could be used to highlight the importance of the physical arrangement of a meeting. Other requirements include a writing board/flip chart and markers. Printed copies of the agenda (Appendix A), the checklist (Appendix B), and the role-play scenario and roles (Appendices D-F) should be brought to the workshop. Given that the workshop is designed to be stand-alone, we do not include assigned prework or readings. We minimize handouts and instead provide recommended readings on the workshop agenda handout and refer participants to the MOP website,¹⁷ where all of these readings and additional resources are available. The meeting checklist, however, should be referenced and used as a framework throughout the workshop (i.e., brainstorm, role-play, debrief, and action plan) to ground learners in the key elements of effective meetings. One option is to

assign the recommended readings outlined in the agenda as required prework that may be referenced during the workshop.

Our evaluation (Appendix G) consists of a one-page anonymous form handed out at the end of the workshop. Participants start the evaluation with an open-ended commitment statement regarding how they will change their meeting practice (i.e., “What specific action will you take tomorrow morning to improve the meetings you attend or lead?”). The evaluation then asks participants to rate the degree to which they agree or disagree using a 5-point Likert scale (1 = *Strongly Disagree*, 5 = *Strongly Agree*) with five statements about how effectively the workshop components have addressed the objectives. Participants also rate their agreement or disagreement with the effectiveness of the workshop format. Three additional open-ended questions ask what aspects of the training are most and least effective and how we can improve the workshop. Evaluations are both formative and summative, allowing us to improve the workshop over time. We analyze quantitative data (i.e., Likert scales) using Excel. A team of three MOP leaders reviews the qualitative data (i.e., commitment statements and open-ended questions) for common themes.

Workshop Schedule

The session agenda (Appendix A) for a 75-minute session includes the following:

1. Welcome and introductions: 5 minutes.
2. Brainstorming: 15 (20*) minutes.
3. Role-play: 35 (40*) minutes.
4. Reflection and review of key components: 10 (15*) minutes.
5. Action plans: 5 minutes.
6. Evaluation: 5 minutes.

*Ninety-minute sessions are ideal, adding 5 minutes each to the brainstorming, role-play, and reflection.

Workshop Administration

Welcome and introductions: Facilitators greet participants, review the agenda for the day, and ask participants to introduce themselves by name and institutional role. Roles give facilitators a sense of meeting experience.

Brainstorming: One facilitator leads a brainstorming exercise on what makes an ineffective meeting using a prompt such as “What is the worst meeting you’ve attended in the last 2 weeks and why?” The other facilitator scribes responses into three columns with spaces between (columns are left untitled initially) using the whiteboard or flip chart. The left-hand column includes premeeting challenges (e.g., invited wrong people, no agenda sent out), the middle column represents challenges during the meeting (e.g., started late, no delegation of roles, dominating participants), and the right-hand column includes postmeeting challenges (e.g., no action items, notes not disseminated). When the group runs out of ideas or starts repeating them, facilitators can add any missing items from the checklist (Appendix B). Once the brainstorm is completed, the facilitators explain that the three columns represent the typical phases of any meeting, adding titles at the top of each column. Participants are asked to consider successful meetings they have attended and to propose remedies to the common bad meeting practices. The scribe notes the proposed remedies next to the bad meeting practices on the whiteboard or flip chart. Again, the facilitators can add additional remedies from the checklist if they are not raised in the brainstorm. For example, referencing the checklist, facilitators can ensure that important premeeting practices such as sending an agenda in advance, identifying appropriate meeting participants, and having clarity of meeting purpose are covered in the workshop. Another option is to require the recommended reading described in Appendix A as prework to ensure that key meeting practices are covered. By asking facilitators to bring up key points from the checklist not identified by the group, we avoid using traditional didactics while still ensuring that key learning objectives are covered.

Role-play: We have included a facilitator guide (Appendix C) as well as example cases and roles for faculty (Appendix D), staff (Appendix E), and learner (Appendix F) audiences. These cases can be modified for specific audiences as needed. The facilitator guide has specific details regarding how to set up and monitor the role-play. The point of this exercise is to get everyone involved in practicing the skills they have learned about running meetings. The case is meant to be low risk, fun, and vaguely realistic. It is important to explain to all participants that if they perform perfectly, nothing will be learned. Encourage them to embody their roles and have fun without being mean. This activity should take approximately 35-40 minutes, and facilitators can slow down or fast-forward the action as needed. Some workshop participants are assigned roles such as Dr. Same and Dr. Power, while others are assigned to be coaches. Coaches observe the action and advise the workshop participant who volunteers to be the mock-meeting facilitator. The coaches advise the mock-meeting facilitator prior to starting the role-play. Workshop and mock-meeting facilitators can call a time-out at any point during the role-play to obtain coaching. Workshop facilitators should stop the action every 3-5 minutes, if only to engage the coaches. Prompting questions include “What’s going on now?” and “Help your facilitator, what should he/she/they be doing now?”

Reflection and review of key components: The workshop concludes with a brief reflection involving the whole group of participants, who reflect on strategies they used to overcome the challenges or additional strategies they could have used. We recommend coming up with a few lessons learned and a review of key components from the checklist (Appendix B) using the framing from the beginning of the session (premeeting, during the meeting, and postmeeting).

Action plans: Individual participants are asked to identify a specific action plan that they will put into practice to improve how they run (or participate in) future meetings. We ask for a commitment statement at the top of our workshop evaluation using the prompt “What specific action will you take tomorrow to improve the meetings you attend or lead?” Rather than providing handouts, we refer participants to the MOP website¹⁷ for ongoing support and resources. We recommend going to the MOP website in real time during the workshop so that participants may see the available resources, including sample meeting ground rules, facilitation resources, a meeting agenda template, and information on how to address gender bias in meetings.¹⁷

Evaluation: Although online evaluations are easy to distribute, they are not always easy to retrieve. We recommend handing out evaluations (Appendix G) 5 minutes before the end of the session and asking participants to complete them before they leave.

Results

In 8 months, we conducted nine MOP workshops for 133 faculty, administrative leaders, staff, and learners from the UCSF Schools of Medicine and Dentistry. We collected 108 workshop evaluations (81% response rate) from MOP participants. Participants agreed on a Likert scale of 1-5 (1 = *Strongly Disagree*, 5 = *Strongly Agree*) that “MOP accomplished its goal of providing tools to enable me to transform meetings to highly productive interactions where all voices can be heard” ($M = 4.31$). Participants also agreed that “the format of the training was effective” ($M = 4.42$). Additional participant feedback data may be found in Appendix H. Themes from the commitment statements addressed all three meeting phases (premeeting, during meeting, postmeeting), although most focused on premeeting action. The most common themes included setting an agenda and goals, followed by being better prepared and establishing ground rules. One participant committed to being “better prepared personally for the meeting—having read the emails readings and notes from prior meetings.”

Participant evaluation of the most effective aspects of the workshop highlighted the role-play as the strongest component, followed by the checklist and brainstorm components. One participant wrote, “The role-playing part was a good way to see how the skill can be implemented.” Least effective aspects and

suggestions for improvement also focused on role-plays and handouts. Some participants wanted the role-play to be more focused, while others thought it should have been extended. One participant wrote, “It was a little challenging to play a role and concentrate on the tactical lessons being taught.” These evaluation results helped us to make adjustments to the workshop such as providing more structure to the role-play and reducing the number of handouts. We disseminated the workshop materials to other UCSF department educators and two other academic medical institutions. Readings, tip sheets, tools, and meeting templates are available on the publically accessible UCSF MOP website.¹⁷

Discussion

Given the increasing number of hours spent in meetings and the critical role meetings play in organizational process and change, we anticipated that MOP would have broad appeal across our institution. We advertised the workshop via the School of Medicine monthly e-newsletter and brief presentations to targeted groups such as the School of Medicine managers’ meeting. Workshop requests came from diverse entities including departmental divisions, administrative units, and non–School of Medicine faculty. In addition, we disseminated the workshop toolkit to two other institutions.

We think it is powerful to have an interprofessional group of workshop facilitators including faculty and staff so that we gain diverse perspectives and expertise on meetings and can then role-model interprofessional collaboration for meetings. We strongly recommend that everyone in the room participates in the workshop and that there should not be anybody merely observing the session. We had one workshop where a supervisor insisted on observing, and that may have impacted the workshop dynamic, making participants less responsive, particularly in the brainstorm. Workshop feedback was critical to our revision process, leading us to develop the website, simplify and reduce handouts, add more structure to our role-play, and ground the workshop in the checklist so participants would have concrete meeting practices to reference. We found paper evaluations completed during the workshop provided us with a high rate of return. In addition, given meetings’ universality and frequent low quality, it was not difficult to find faculty and administrators to volunteer their time to facilitate workshops. In fact, the workshop itself served as a recruitment tool, with participants signing up to join the facilitator pool.

The role-play received far more positive evaluation comments than critical ones. While some participants indicated that they were initially resistant to the activity, the role-play was an overall strength. Participants seemed to appreciate the interactive nature of the workshop and expressed a desire for a workshop focusing on meeting facilitation. Given this feedback, we are currently developing such an MOP workshop.

Our initial iterations of the workshop included a postworkshop facilitated observation session where a facilitator or peer coach would guide self-reflection and feedback on applied meeting skills. We did not have the resources to implement this level of programming but think it could be an effective curricular element to reinforce higher learning of meeting skills. In addition, we are discussing the possibility of creating a standardized meeting evaluation similar to teaching evaluations.

There were a small number of limitations to our workshop. Our evaluation focused on the workshop (the format and the attainment of its intended goal), and although we did capture participants’ anticipated behavior change, we were not as focused on the impact on the participants’ overall practice. We are considering a follow-up evaluation of participants to ask about behavior changes they have implemented in meetings and whether they have noticed a change in how institutional meetings are run.

The interactive role-play with time-outs for coaching seems to be a critical program element. However, it can be challenging to determine the right timing and focus, and the workshop requires a facilitator comfortable with conducting the role-play.

A final limitation is the fact that given the interactive nature of this group workshop, results may vary depending on the engagement of group participants. To avoid depending on didactics and to address this potential limitation, MOP facilitators actively engage participants during the brainstorm and insert key

meeting strategies if group members are unable to identify them on their own. In addition, participants are given a checklist (Appendix B) and resources on the MOP website to reference after the workshop.¹⁷

Increasingly complex systems require collaborative approaches to leadership and change. Meetings are critical and inevitable elements of institutional cultures. Yet meeting skills are not standardly taught to academic medicine faculty and administration. Our hope is that this stand-alone workshop on the basics of how to create effective meetings will be a feasible tool that will enrich the work environment of other institutions.

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Ethical Approval

Reported as not applicable.

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