

National Indian Health Board



Meetings can be Good for Something other than a Nap: *Risk Management Lessons from the Field*

Question: My week is full of meetings after meetings. I know that we have to have them, but how can we make them really productive?

Answer: The last thing that any of us needs is more meetings. We have all been in those meetings that went on for hours and hours and we walk out of the room wondering, “What just happened in there?”. Running a meeting more effectively and productively can help to avoid both longer meetings and can prevent us from pulling our hair out. You should never be afraid of a meeting, just work to have good meetings.

The first rule of any meeting is to know why it is being called. The purpose of the meeting should be clearly spelled out and shared with all people who are to attend. This will help to keep the meeting focused, avoid surprises by the part of the staff, and should help attendees prepare for the meeting.

Establish a timeline for the meeting, and share that with all attendees as well. Everybody should know when it is to start and when it is to finish. It is important to not just publish this information but to stick to it as well. This will help to keep the meeting moving, and will help all attendees to plan around their attendance. It is a sign of respect for people and their work when you also respect their time.

An agenda should always be prepared in advance of a meeting and sent to all attendees. The agenda, much like the purpose, will help attendees to be prepared to discuss the items, and should help keep the meeting moving forward. All attendees should agree upon the agenda in advance and if anything needs to be added, it can be added by the group as a whole. The agenda can be static or can change with each week. A static agenda can lead to complacency on the part of the attendees, though, and so facilitators should think about what they can do to mix things up a little bit every now and then.

Question: Who should run the project meetings?

Answer: Effective meetings are led by effective facilitators. A single person should be designated as the facilitator of the meeting – and this is not always the ‘boss’ or the directors. The role of the facilitator is not to boss people around, but to ensure that the meeting is progressing through the agenda, fulfilling its purpose, to elicit participation, promote discussion (when necessary), and organize note taking. Anybody can facilitate the meeting, and sharing the responsibility is a nice skills building activity (and varies the nature of the meetings just enough to keep them interesting).

Question: How often should we have our meetings?

Answer: Meetings should be held when they are needed. Most organizations and projects have regularly scheduled team or project meetings, and this is fine. The routine nature helps people to plan for and around the meetings. But meetings can become burdensome, and perfunctory if they are only held because they are already on the calendar. If the staff does not feel like a meeting would be productive, then seek to reschedule it when the timing is better and people are in the right mindspace. Nobody benefits by cramming in a meeting that they do not want to be attend and for which they are not prepared.

Question: Everybody hates taking notes – do we really have to?

Answer: Notes should always be taken at meetings. They don't have to be formal minutes, but they should capture the topics and highlights of the meeting. Most importantly they should list out action items clearly (whether they be listed out separately or put in bold font, they should be highlighted in some fashion) that were designated during the meeting. The notes should be distributed to all members of the team regardless of their attendance at the meeting, and the notes should be saved or stored in the same place. Meetings can even begin with a review of the action items from the previous meeting. And note taking responsibility can be shared between people, so that one person is not always stuck taking notes. And notes do not need to be verbatim – just a general synopsis of what was discussed and decided upon.

Question: Our project officer likes to meet with us from time to time. This really freaks me out because I always feel like I am in trouble or need to put on an act for them. How can I relax about these meetings?

Answer: Meetings should be held regularly with project officers or representatives of funders. These meetings are a good project and risk management strategy. They ensure that the project director and staff receive the most up to date information from the funder – this can be information on reporting practices, administrative operations, or alterations that need to take place at the programmatic level. The communication is also reciprocal, and the funder is able to hear about successes and challenges from the project team. Project officers want you to succeed, and they have access to resources that can help you do that. Remember that first and foremost – project officers are your friends. They are there to help.

These meetings (or calls) should not be rescheduled if it can be avoided, as project officers' schedules are often full and hard to manipulate. It is also a good practice to invite at least one project staff to join the each of meetings with project officers. They can be there to provide additional detail on programmatic activities to the project officer, but it is also a good experience for the project officer to meet and be familiar with primary project staff. The staff then also gains some insight into what the funder is requesting, how the funder operates, and how this translates to programmatic activity.

Question: My project director often has to meet with our Tribe's health committee or Health Director. Should I be worried about these meetings?

Answer: It may be important from time to time for Tribal projects to arrange for meetings with health department or Tribal leadership. Remember funding comes to the Tribes, and as such they are stakeholders in the operation and success of the projects. Simple meetings to update Tribal leaders on progress or brainstorm with them regarding significant barriers helps to increase leadership buy-in and may lead to valuable support if the project needs it in the future. These do not have to be that often – perhaps quarterly or even twice a year. You should feel free to ask your project director if you can attend one of these meetings – it may be valuable for you to know what is discussed and how it is presented, and you may have valuable insight to share.

Additional Resources

For additional tools and tips on how to run effective meetings and use good facilitation skills, feel free to use the following resources:

- http://www.gretchenrubin.com/happiness_project/2009/07/14-tips-for-running-a-good-meeting/
- <http://www.mindtools.com/CommSkill/RunningMeetings.htm>
- <http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main>