Leadership and Management Foundations for Academic Medicine:

Engaging Effectively in Inclusive and Relational Meetings

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Learn
Serve
Lead

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Association of
American Medical Colleges

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Learning Objectives

1. Employ leading practices to plan, facilitate, and engage effectively in meetings

2. Apply relational facilitation practices

3. Bring a lens of inclusion to how they engage in meetings (as facilitator, planner, or participant)

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Today's (Fast-Paced!) Workshop Format

❖ Recall a past or future meeting to apply what you learn today

❖ Sharing of leading practices

❖ Wrap up with Q&A/open discussion

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5-Minute Reflection

Recall a past meeting (that maybe didn't go as well as you expected) or a future meeting you must plan or attend; and apply the learnings from today's session. Jot down aspects of the meeting:

- Frequency of the meeting, if not a one-time gathering

- Attendees

- Your individual role

- Purpose of the meeting

- What excites you about this meeting (and related work)?

- What concerns you about this meeting (and related work)?

- What's the worst thing that could happen if this meeting does not go well?

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When You Think About Meetings…
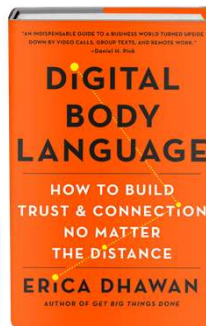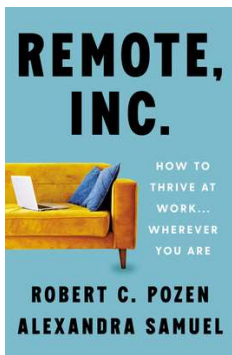
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Leading Practices

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The Meeting Process

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The Meeting Process: BEFORE
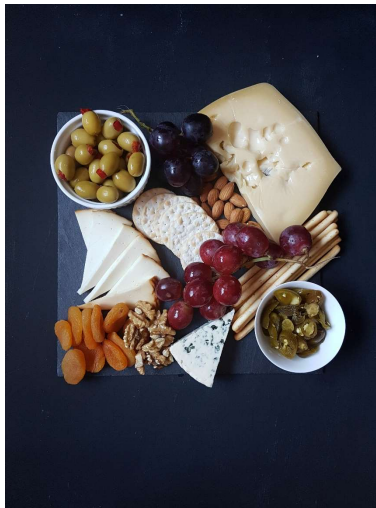
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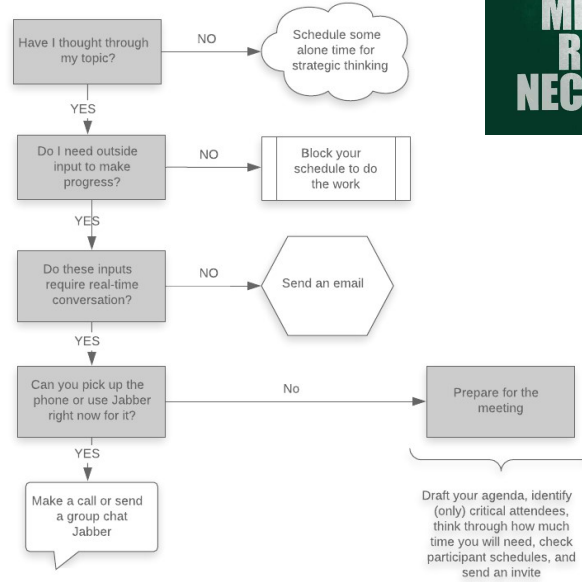
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5 P's of Meetings

Purpose: Does the meeting have a clearly defined purpose?

Participants: Are all of the relevant parties (and only the relevant parties) invited and able to attend?

Probable Issues: What are the concerns that could likely arise?

Product: What do we want to have produced when we are done?

Process: What steps should we take during the meeting to achieve the purpose, given the product desired and potential issues we may face?

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BEFORE: Be Intentional

- ❖ Only accept meeting invitations that have an agenda, make good use of your time, and advance your (and others) priorities.
- ❖ Take stock of who must attend the meeting.
- ❖ Proactively consider how diversity and power dynamics might affect attendee engagement.
- ❖ Meet during normal business hours.
- ❖ Include a statement in the meeting appointment inviting attendees to request accommodations as needed

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Make Meetings Shorter

👏 *CUE: WILD APPLAUSE*

- ❖ Schedule meetings for 25, 40, or 55 minutes (unless you're planning a work session/retreat)
- ❖ Schedule "drop by" calls/meetings for 10 minutes
- ❖ For 2+ hour online meetings, schedule a 5-minute break every 90 minutes

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Exercising One's Own Agency

Declining a meeting	[Meeting topic] is important, and I appreciate you including me. I don't believe I need to attend to directly contribute to this work. I stand ready to be supportive. Please reach back to me if I can contribute in another way.
Requesting a shorter meeting	I look forward to connecting on [topic X]. My schedule is a challenge, and it feels as though we can have this conversation in [15/30] minutes. If you are comfortable with this, I'd appreciate you changing the meeting length to [15/30] minutes.
Attempting to bring closure to an ongoing email exchange	[Via Teams chat] I just received your email. Do you happen to have 10 minutes now that we could hope on a call to bring this issue to closure? I want to be mindful of both our time and overflowing in-boxes!

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BEFORE: Create A Clear Agenda

❖ Use a timed agenda

- Schedule check-in and appreciative debrief time
- Be sure to allocate ample time for discussion – the number of people in the meeting is an important factor
- Include expected action, pre-reading/reflection, and planned discussion questions
- Reserve the last 5-10 minutes to summarize decisions, identify follow-up steps, and assign responsibilities and deadlines

❖ List expected attendees

❖ Include agreed-upon meeting norms

❖ Distribute agenda a minimum of 2 business days in advance

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Leadership Team Meeting
Tuesday, February 27, 2024
8:00 – 10:00 AM

Facilitator: David Skorton
Guests: Ahmed Bur, Krystle McCloney, Bri Pyfrom

Teams Info: Click here to join the meeting   Dial-in: 1-111-111-111

AGENDA

8:00 – 9:50 a.m.   **Debrief on Financial Contunuity Planning Meetings and Look Ahead to FY25 Budget (Amir Mesarwi)**
- Guests: Ahmed Bur, Bri Pyfrom
- No pre-reading

Teams Round-up – AKA Reminders and In Case You Missed It (ICYMI)
- REMINDER: By 2/26, please complete the poll regarding the 4 remaining policies awaiting approval. Find on LT/General channel (only LT have access to the general channel).
- ICYMI – Update on Celebrating Our People and Spirit of Excellence has been posted to LT/HR channel. Kari and Julie who partner on this work have access to this sub-channel and will be able to see any comments you post related to this update.
- ICYMI – informational updates on new CAT sponsored "Coffee Connection" pilot and the 2024 Cares Day (find on LT/General)

LEADERSHIP TEAM TOUCHSTONES
- Be attentive and present • Be honest and celebrate openness • Ignore your devices • Be respectful • Be curious • Be courageous • Be open to change • Positive humor welcome • No attribution • Embrace healthy confrontation • Listen with the intent to understand and be influenced

AAMC Principles for Decision-Making During this Time of Continued Headwinds
The AAMC continues to lead and serve academic medicine to improve the health of people everywhere during this time of continued headwinds facing academic medicine and the AAMC. We will continue to make decisions based on the following unwavering principles and the values recently approved in the strategic plan:
- Bring an enterprise mindset to all decisions.
- Trust, tap, and leverage the talent potential that all AAMC staff bring to the table.
- Minimize, to the extent possible, negative impact on staff.
- Recognize the missions of our member institutions and appreciate their budget challenges.
- Always consider the impact our decisions may have on promoting or reducing equity both within the AAMC and externally with our local communities, membership, and key stakeholders.
- Protect our mission and the contributions that we make to academic medicine that do not generate revenue.
- Protect our critical Services.
- Protect the health and the safety of our staff and constituents.
- Be willing to do things differently.

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Being In Community: The Importance of Group Norms

- Participate fully
- Have an open mind
- Be honest
- Be respectful of everyone
- Respect confidentiality
- Apply the "once said" rule
- Close Outlook and other applications
- Respect the agenda/clock
- Be on camera (...or not)

More Pre-Work: Your Decision-Making Strategy

Model	Relative degree of:		
	Effectiveness	Efficiency	Commitment
Authoritarian	lower - higher	higher	lower
Consultative: Test / Input	higher	moderate	moderate - higher
Democratic	moderate	moderate - higher	lower - higher
Consensus	higher	lower - moderate	higher
Delegation	lower - higher	lower - higher	lower - higher
Laissez-faire: (failure to use any of the above models)	lower	lower	lower

June 2009 Leading Organizations to Health retreat. (Suchman, A., Rawlins, D., Williamson, P.)
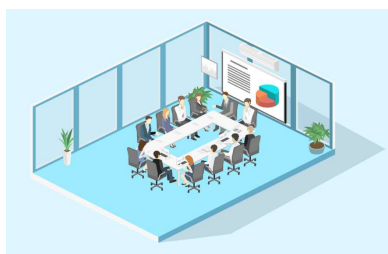
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Engaging in Hybrid Meetings: The Challenges and Opportunities of Virtual Meetings

Online meetings impose unique psychological, physiological, cognitive, and logistical burdens.

❖ Take advantage of the unique benefits of online meetings, like the ability to use chat, polls, or breakout rooms.

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Hybrid Requires Even Greater Intentionality

- Recognize the dynamic of the group

- Consider the introvert-extrovert continuum

- Acknowledge your own "proximity bias" and "video bias"

- Have a remote host and in-person host and share facilitation responsibilities

What was implicit in-person must be explicit in a hybrid meeting!

Erica Dhawan, "Hybrid Collaboration Norms Toolkit" (2022)

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The Meeting Process: DURING

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DURING: When You're <u>Leading</u> the Meeting…

❖ Invite participants into the meeting with full attention, facilitate them through the agenda, and encourage participation from the full group

❖ Utilize strategies to ensure a safe environment for all to engage

❖ Watch for conversation dominators…and interrupt domineering behaviors

❖ Utilize the agenda and honor the time allocations

❖ Work to get meetings unstuck

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Resources: Facilitation Techniques

World Café –
www.theworldcafe.com

Appreciative Inquiry –
www.appreciativeinquiry.case.edu

Liberating Structures –
www.liberatingstructures.com

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Always Be Prepared: When Meetings Get Stuck

Get personally unstuck
- Noticing personal "hooks" and letting go of them
- What story am I telling myself?
- Centering practices
- Naming the barrier and talking about it

Clarify content and processes (proactively and when things get stuck)
- Negotiate the agenda (including "needed action") and stick to it
- Specify the decision-making process

Enhance the quality of the conversation
- Use and call forth dialogue skills
- Support diversity and responsiveness

Use meeting of dialogue formats
- Pass an object to the speaker; no one speaks if they don't have the object
- Time-out for reflective silence
- Time-out for process reflections
- Breakout groups
- Naming the elephant

June 2009 Leading Organizations to Health retreat. (Suchman, A., Rawlins, D., Williamson, P.)

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Dealing with Behaviors That May Delay, Distract, or Derail

Behavior	Description	What this may sound like	Ways to Deal with Them
Dominating	May monopolize or takeover conversation, block others from contributing, with objectives of influencing/changing opinions or outcomes in a non-inclusive way	"I'm the only one with experience in this matter. Let me tell you what to do."	• "We appreciate your experience and will take it into account. Let's also see what others think. We want a variety of perspectives." • "I can hear that you are passionate about this topic. We will continue to consult you as this project evolves over time." • "It sounds like we all have the same end goal, and I think there are a variety of ways we can get there. Let's continue discussing our options." • Allow space for others' opinions.
Antagonistic	May antagonize the facilitator or other participants; Creates an un-inclusive atmosphere or impacts phycological safety	"This won't work." "This doesn't make sense and I'm not willing to try." "My mind can't be changed and I'm going to keep reminding you of that."	• Reiterate ground rules or touchstones. "It is important to me that we create a safe space for everyone to share their opinions with no judgement." • Get back on topic "I'd like to pull us back to my original question..." • Re-state their position more objectively.
Quiet or Non-Participative	Could be a result of personality style, participant engagement preferences, or perhaps they feel uncomfortable	...	• Reinforce safety and inclusion • Establish eye contact and invite others to share "I want to ensure that we hear all of the voices in the room. If you haven't shared yet, what's your perspective?" • Summarize what we've heard so far and ask "Are there any alternative viewpoints that we haven't discussed yet?"
Overly Talkative	Emphasizing the same point without enhancing/advancing the discussion, takes away time from the agenda or that others could use to share alternative perspectives	Blah blah blah blah blah blah blablablablabla blablablablabla	• Acknowledge their perspective and remind them of the agenda or time limit. • "I can hear that you are passionate about this issue. And that is a perfect reminder of my next point..." • "What I think I'm hearing from John is..." What do others think about that? • Utilize parking lot if it is off topic, or schedule another meeting to deep dive into orther topics

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DURING: When You're __Participating__ in the Meeting…

❖ Prepare in advance

❖ Listen well, contribute, and acknowledge and build on the contributions of others

❖ Respect the agenda

❖ Commit to the agreed-upon group norms, and name behaviors that conflict with those norms

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The Meeting Process: AFTER

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AFTER

❖ Send meeting summary or minutes within 5 days

❖ Check in with attendees, if needed

Meeting Minutes

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Questions?

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