

April 2024 MITE Hot Topic: Project Team Meetings as an Essential Improvement Tool

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At all levels within health systems, leaders and staff, both administrative and clinical, have attended meetings that they found unproductive. Improvement experts have written extensively on the necessary ingredients for effective meetings, as these are essential for generating enthusiasm, defining responsibility, and establishing agreement within improvement projects. Successful project teams must share a clear understanding of:

- The project's problem statement and overall goal: *What facts have led us to prioritize __ as an urgent need? What does our future state look like in measurable, time-bound terms?*
- Solution selection: *What will we do or change to reach our desired future state?*
- Process and outcome measures: *How will we define success?*
- Project milestones: *What sequence of steps toward our goal are reasonable given existing resources and time?*

To ensure clarity of the above, every improvement team must establish a meeting series at which project milestones, such as those within a Lean Six Sigma project or a basic test of change (Plan-Do-Study-Act cycle) are planned and reviewed. Clinical improvement team meetings should include the project facilitator (e.g., LSS Black Belt/Green Belt), administrative/clinical leaders such as a "process owner" who will sustain the changes that the team selects/implements and additional stakeholders or subject matter experts (SMEs) within the scope of the problem statement. Each meeting should focus on completion of project tasks and progress toward milestones, engaging the team in resolving any challenges as they arise.

The following are generally recognized as essential elements of effective project meetings:

1. **Clear meeting objectives.**^{1,2} Timed agendas with topics related to project tasks and milestones should be shared ahead of time, and should include any specific questions to be answered or decisions to be made, as well as status of all assigned action items. Some improvement organizations advise including meeting objectives in each agenda.²
2. **Assigned meeting roles and responsibilities.** While every project meeting requires a leader/facilitator to guide the team through a focused agenda, assigned roles may also include a timekeeper and notetaker.^{1,2} General responsibilities of all participants include prior review of meeting materials, completion of action items, arriving and ending on time, and readiness for active participation. Personal roles in the meeting should be understood by every participant.^{1,3}
3. **Appropriate meeting frequency, length, and participation.** Project team meetings should be only as long as is needed to meet objectives, excluding content that could be effectively addressed offline.³ Biweekly team meetings may be adequate to ensure steady project progress, but may be more frequent in the case of poor project performance. In addition to core team members, stakeholders and SMEs may attend meetings as agenda topics require; an absence of key stakeholders can at best delay important decisions, and at worst, result in decisions that will later be questioned or contested. Conversely, attendees with no stake in scheduled agenda topics or with unclear roles may perceive the meeting as a poor use of time. Smaller meetings

generally encourage greater ownership, as they engage participants in active thinking and consideration of personal project impacts.^{2,3} Every meeting should “feel productive” to all participants!^{1,3}

4. **Shared meeting action items and outcomes.** Meeting notes or minutes must reflect any decisions made, action items with assigned owners and due dates, and any “parking lot” topics to be brought forward to the next meeting.
5. **A focus on honesty, respect and trust.** Improvement experts often cite *listening* as a key meeting facilitation skill, as expression of diverse perspectives is critical to project success—especially during the LSS Define phase, when the foundation for the project is laid, and in the Improve phase, when the team and key stakeholders carefully select and commit to a solution. When differences of opinion exist, a consensus approach to decision-making may require more time and effort than other approaches (e.g., “gather [ideas] and decide”), but ultimately builds stronger ownership of decisions.² Team cohesion is supported at every meeting with a free-flowing exchange of ideas, always seeking to understand, and delivering on promises.³

At the close of project team meetings, facilitators should check for understanding, thank participants for their time and contributions, and acknowledge project successes to date. When meeting preparation, team and stakeholder engagement, and documentation are all aligned to move a project forward, the benefits of productive meetings are felt by all involved!

References:

1. Hannah, S. Better Meetings and Deeper Listening: The Underrated Keys to Improvement. Institute for Healthcare Improvement, 2/16/23. <https://www.ihl.org/insights/better-meetings-and-deeper-listening-underrated-keys-improvement>
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3. Babkirk, D. The Art of Great Meetings. University of Maine Cooperative Extension, Bulletin #6102, 2015. <https://extension.umaine.edu/publications/6102e/>