**Harnessing Who’s in the Room: Creating and Facilitating Productive Meetings**

**UCSF School of Medicine Culture of Leadership Initiative**

**Meeting Optimization Program**

**Agenda by Ellen**

**Updates for Zoom**

Background

The Meeting Optimization Program (MOP) developed from the 2014 School of Medicine’s Dean’s Retreat by a group of SOM faculty and staff who identified a need to develop a culture of leadership at UCSF. The goal of MOP is to tackle one of the most common leadership challenges we face – running and facilitating meetings. This workshop briefly discusses key components of an effective meeting and takes a more in-depth look at facilitating a productive meeting.

Objectives:

1. Describe components of effectively setting up and running a meeting
2. Clarify the role that a facilitator has in a meeting
3. Describe and practice approaches to facilitating participation during a meeting including managing common behavior challenges
4. Address adaptations needed to facilitate a meeting via Zoom or other online platform

Recommended Reading: (available along with other meeting resources on our MOP website at <https://medschool.ucsf.edu/meeting-optimization-program>)

1. [Effective Meeting Checklist](https://medschool.ucsf.edu/sites/medschool.ucsf.edu/files/Checklist%20-%20Effective%20Meeting.pdf)
2. [Setting Meeting Ground Rules](https://medschool.ucsf.edu/sites/medschool.ucsf.edu/files/Secunda%20-%20Inclusion%20Ground%20Rules.pdf)
3. [Brief facilitation tip sheet from the CDC](https://medschool.ucsf.edu/mop-102)
4. [Meeting Facilitation-Strategies and Phrasing](https://medschool.ucsf.edu/mop-resources)

(Possible additional resources on remote meeting facilitation)

<https://miro.com/blog/engaging-remote-meetings/>

Has basic tips via short videos: <https://uit.stanford.edu/news/zoom-effectively-discover-ways-lead-inclusive-meetings-and-participate-productively>

<http://www.islandinstitute.org/resource/tips-virtual-meeting-facilitation>

Some interesting engagement tips

<https://www.scrum.org/resources/blog/remote-teams-and-virtual-facilitation>

Good blog with lots of tips

<http://www.bethkanter.org/facilitate-virtual-meetings/>

<https://youteam.io/blog/make-virtual-team-meetings-more-effective-facilitation-skills-you-need/>

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| **Time** | **Topic/Activity** | **Resource** | **Outcome/Facilitation notes** |
| 0- 10  (10 min) | Introduction to MOP and workshop objectives  Icebreaker: Quick polls on people’s experience with and experience of zoom | Agenda | Set context Groundrules – (typical and also Zoom-specific) |
| 10- 25 min  (15 min) | Individual brainstorm followed by popcorn facilitation:  What is the worst meeting you’ve attended in the last month and why? | Tip Sheet |  |
| 25-40 min  (15 min) | Group brainstorm: What are strategies to address these common bad meeting practices and behaviors? | Tip Sheet |  |
| 40-100 min  (60 min) | Assigned role play and debrief | Case and Role play 3 breakouts @ 15min each | Participant engagement/learning and application  Breakout rooms,  Debrief back into large group and have people share what they or someone else did that worked well. |
| 100-115 min  (15 min) | Commit to specific strategies to try for the next meeting you attend or lead | Individual work and role play group share | Commitment |
| 115-120  (5 min) | Summary and Feedback | Evaluation handout | Review key themes, strategies, resources |

**Breakout group instructions: 45 minutes (approximately 3 rounds)**

**May 26, 2020**

Victoria will post the scenario on the full group chat, to be available to breakout groups.

SCENARIO: You’re a committee of faculty and staff to determine how to spend a $50,000 donation to support frontline hospital workers during Covid-19. By the end of the meeting, you must present the department chair with three prioritized ideas.

When we get into the small group (approximately 10 people per group), have people identify:

1 facilitator

3 observers/ coaches

Everyone else is a group member.

Everyone is told that they should engage in character (faculty, staff, administrator.) Some people might be coached to take on specific behaviors. Our facilitators (Ellen, Raquel and Maria) send a private chat to three of the group members with a message about their special role. Choose three different roles for each of 3 rounds of role plays. (Feel free to repeat a role if there is good learning from the role.)

1. Someone who unmutes and interrupts
2. Someone who is clearly multi-tasking
3. Someone who keeps raising their blue hand to speak and talks for a long time
4. Someone who is a “know it all”
5. Someone with positional power who abuses it
6. Someone who doesn’t speak
7. Someone who goes off on a tangent
8. Someone who disagrees with others’ opinions
9. Someone who says something offensive

Start the first scenario with introductions and check ins.

Each round should be about 7 minutes, or until there’s an obvious pause. The facilitator can ask the observers/ coaches for help during their round as a facilitator.

**Debrief questions**

Ask the facilitator: What did you do that felt like it went well?

What would you have done differently?

Ask the group members? What did you experience that went well?

What else might you have tried?

Ask the coaches: What did you observe?

Do you have other suggestions?