

Introduction

After watching the video of Sandra's first time chairing a meeting with Caregiver and Patient Advisors, what do you think could have been done differently to avoid the difficulties or challenges she experienced? To answer this question, look at the following excerpts from Sandra's meeting and jot down your thoughts about what could have been done differently to provide the best experience. Suggested answers to each question can be found on the following page.

Questions:

- 1 – Unprepared
- 2 – Roles
- 3 – Acknowledge
- 4 – Undirected
- 5 – Derailed



1. Unprepared

Sandra: [This is my first time meeting with patients and caregivers. I don't feel prepared.]

At Sandra's first meeting, she felt uncertain with the new dynamic of the committee. What could Sandra have done differently to feel more prepared for her role as Chair?



ANSWER

Being enthusiastic about a project and successfully assembling a strong team is a good place to start but, to feel confident and in control, **a Chair needs to prepare for the meeting beforehand.**

For example, Sandra could have taken time before the meeting to review the expectations outlined for her role (if available); look at potential meeting time options; and ask members to send her their comments on the Terms of Reference.

In general, **a Chair is responsible for setting the proposed agenda, arranging for guest speakers and other organizational requirements** (e.g., technological support). The Chair must also ensure that all members receive scheduling information and meeting materials in a timely manner.

If a Chair doesn't have time to perform these tasks, then he or she could delegate some tasks to other team members or request administrative support. In this case, Sarah could have asked one of the other members to collect and summarize the Terms of Reference comments.

One good online guide on how to chair meetings is:

<https://www.diycommitteeguide.org/resource/chairing-meetings>.

For a successful meeting, there are other important items which must be decided by the entire committee and will affect the committee's dynamics. For example, it's good to have a discussion with the members about such topics as confidentiality and respect for varied perspectives. It is important to know the organizational expectations of council, committee, or project members and outline these expectations during the very first meeting of the committee to create guidelines for the ongoing collaboration efforts.



2. Roles

Sandra: [I'm glad someone volunteered, but I'm not convinced Carol is ready to take on this role.]

When deciding who would take minutes during the meeting, the Caregiver Advisor, Carol, volunteered, but Chairperson Sandra wondered if Carol understood what the role entailed. What could Sandra have done differently to avoid this situation?



ANSWER

Taking clear and concise minutes is not easy. Which is why leaving it up to someone to volunteer to be the minute-taker can cause real problems when it comes to keeping a clear record of discussions, decisions, and action items. Additionally, when new to a committee, it is easy for Caregiver Advisors to feel intimidated. They can feel pressured to accept tasks to demonstrate that their contribution is worthwhile, as Carol did in this example.

To avoid this, Sandra could have **made arrangements prior to the meeting for someone with experience to take the minutes**. This would have avoided participants feeling pressured to take on a task that they are not suited to do or do not have the time to do. It would also give the Chair an opportunity to discuss how the minutes should be taken, provide a minute template that would assist the note-taker, and ensure consistency. It's also a good idea to agree on a deadline for forwarding the minutes to the Chair for review and distribution.



3. Acknowledge

Sandra: “I’m not sure. I’ll have to check.” [I should have known the answer to that one.]

During the meeting, a member asked about the deadline for submitting a recommendation. Sandra, the Chair, didn’t know. What could have been done differently to improve this situation?



ANSWER

Ideally, the Chair should try to **anticipate questions that might arise in the meeting and do some quick research prior to the meeting**. It's impossible, though, to have all the answers at one's fingertips. However, the Chair could have demonstrated her commitment to providing leadership by responding positively and professionally.

For example: The Chair could have thanked the member for their question and acknowledged the importance of finding out this information. Also, **promising to follow up shortly would show that supporting the committee is a priority of the Chair**.



4. Undirected

Sandra: [I wonder if I should encourage Carol to speak?]

When the group was discussing difficulties with the Schizophrenia Program, there was an awkward silence as the group waited for the Caregiver Advisor, Carol, to comment. What could have been done differently to improve the situation?



ANSWER

It is the **Chair’s responsibility to facilitate the discussion**. In this situation, Sandra could have stepped in to politely ask Carol what her perspective on the difficulties of the Schizophrenia Program were, such as, “Carol, based upon your experience, what improvements would you recommend for the Schizophrenia Program?”

By asking Carol a specific question, it would have highlighted that it was her time to provide input and directed Carol’s response to a specific answer instead of leaving it as an open-ended discussion.

Alternatively, Sandra could have politely thanked the members for their interest, then directed the meeting discussion back to the agenda items. While the committee goal may be to review the Schizophrenia Program, there **are foundational items that must be in place before the committee can move forward to ensure every meeting is productive and organized**.



5. Derailed

Sandra: [Oh no. I don't know how to get this meeting back on track.]

When the Caregiver Advisor began to share too much information and distract the meeting from the original goals, what could Sandra have done differently to get the meeting back on track?



ANSWER

Everyone has attended meetings where members have strayed off topic or misunderstood what type of input would be helpful. It is the role of Chair to **refocus discussion** that has wandered off the point. At the beginning of the meeting, remind participants that, while everyone's input is valuable, there are many items to address on the agenda. Therefore, everyone will need to be mindful of the time. Politely inform the group, "To cover all of the items on the agenda, I might have to cut a discussion short if we are running out of time."

A portion of the Caregiver Advisor's orientation should focus on "how to share your experience in a constructive way." There are times when an advisor is triggered by a personally sensitive topic and over-shares details or opinions about their experiences. To get the meeting back on track, the Chair could interrupt with a few empathic words and suggest that the Caregiver Advisor share the details with her after the meeting.

- For more information for caregiver advisors and sharing their perspective, please see our "**How to Share Your Experience**" in Onboarding.

