



COMMUNITY  
HEALTH CARE  
ASSOCIATION  
of New York State

## Meetings That WORK: *Moving Beyond Your Standard Meeting to Achieve Action*

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## Today's Focus

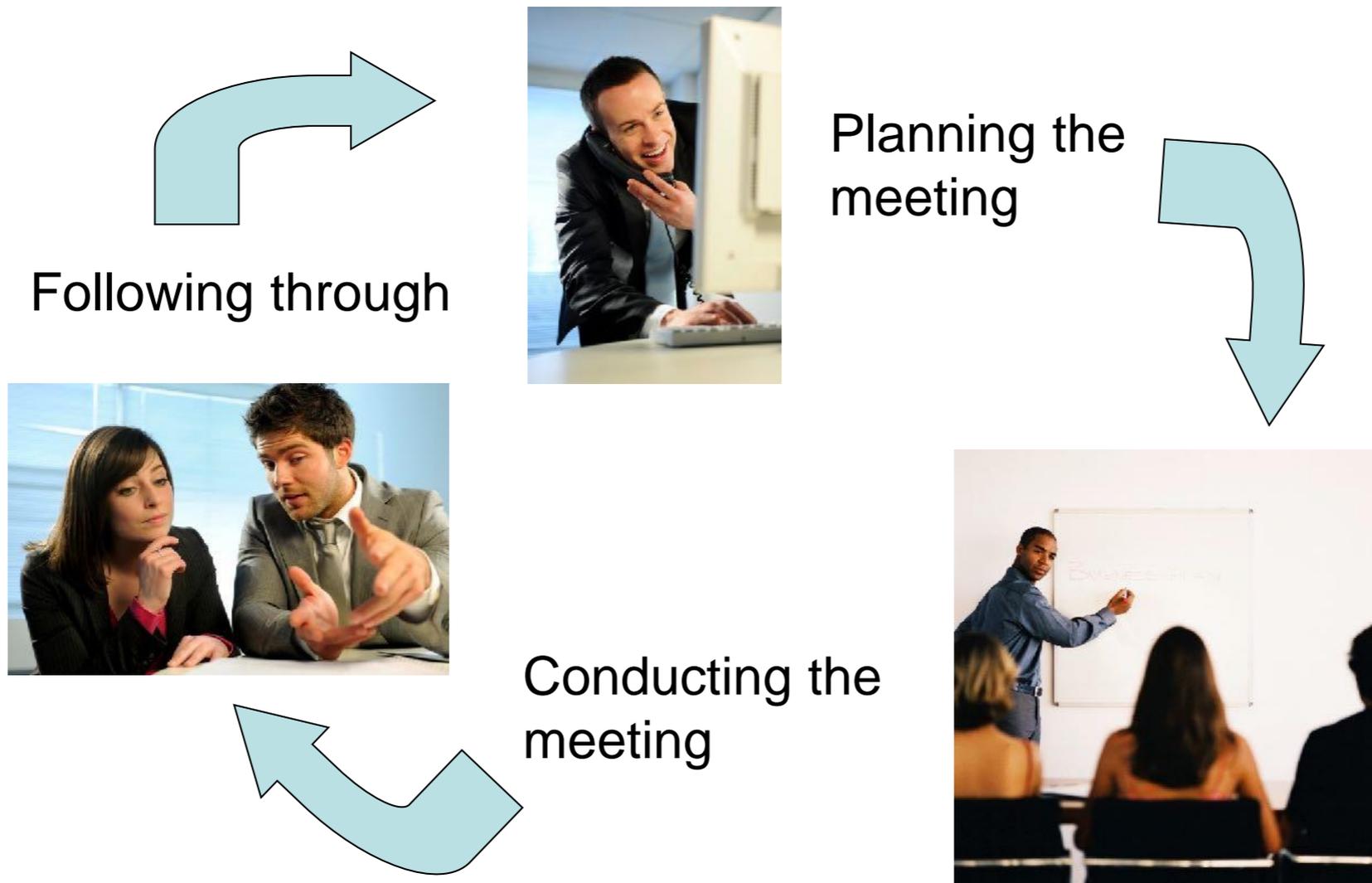
### Objectives:

1. Discover key components to efficient meeting structures.
2. Learn strategies to eliminate unnecessary meetings and ways to streamline discussions.
3. Discover how to elevate accountability and engagement.
4. Discover the tools to set clear goals that lead to meaningful outcomes.

## Chat Discussion

**Describe the characteristics of the “worst meeting ever” you have had to endure. Chat in your answers.**

## *Most Important Elements of Effective Meetings*



## Meeting Planning

### Knowing When To Hold a Meeting

<i>Decision Making</i>	<i>People, Time, and Support</i>	<i>Relationships</i>
<i>Collective creativity will enhance solution ideas.</i>	<i>Implementing our outcome will require individual and team buy-in and support.</i>	<i>Face-to-face negotiations are needed to resolve conflict or misalignment.</i>

Key Question: *Could a decision impact multiple people or teams?*

## Meeting Planning

### Knowing When Not Hold a Meeting

<i>Decision Making</i>	<i>People, Time, and Support</i>	<i>Relationships</i>
<i>There isn't enough data to make an informed decision, or the decision has already been made.</i>	<i>Info could be shared via email, phone, or one-on-one.</i>	<i>People are too hostile or angry in the moment to solve.</i>

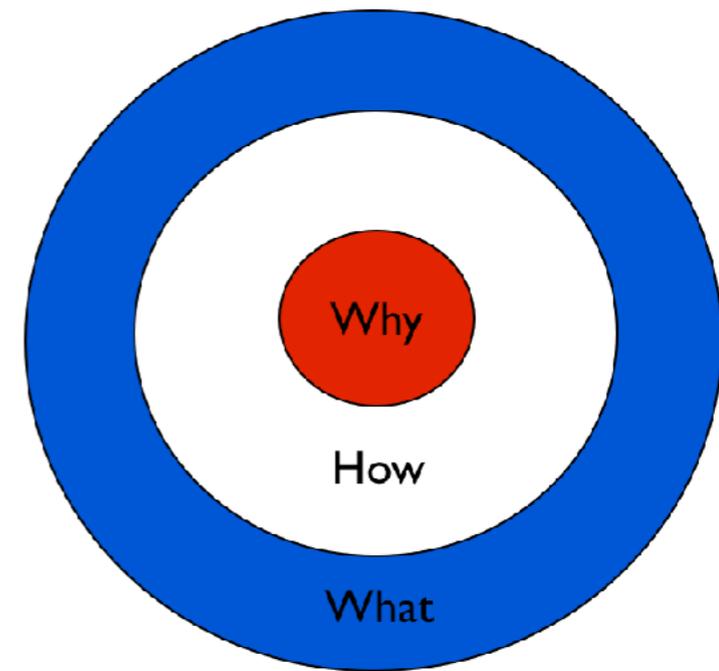
Key Question: *Do I/we have enough information to dive towards a well-informed decision?*

## Meeting Planning *The WHY FACTORS*

*Before you decide a meeting is necessary, be able to clearly state the WHY Factors.*

Be **INTENSELY CLEAR** about:

- Purpose
- Expectations
- Desired Outcomes
- Relevancy Factors



## Chat Discussion

**How many hours a week do you feel you spend in meetings that feel less than efficient?**

***Chat in your answer***

## Conducting the Meeting

### Choose the Right Meeting Type

#### Information Sharing

**Primary Purpose** is to communicate updates, progress on projects, decisions, and any general information.

**Goal** is to be sure everyone is well-informed.

#### Key focuses:

- a. Keep it short and to the point.
- b. There are no hidden agendas.
- c. Experiment with “Stand-Up” meeting.



## Conducting the Meeting Choose the Right Meeting Type

### Information Gathering

**Primary Purpose** is to collect insights, team feedback, important data, or opinions that will help form a future decision or action.

**Goal** is to collect valuable input and build buy-in for future decisions.

### Key focuses:

- a. Ensure participants are well-prepared.
- b. Provide pre-meeting assignments, so participants come with ideas.



## Conducting the Meeting

### Choose the Right Meeting Type

#### Problem Solving

**Primary Purpose** is to identify root cause of problems, explore solutions, and develop ACTIONABLE solutions.

**Goal** is to make decisions and create a plan to address a challenge.

#### Key focuses:

- a. Select the RIGHT participants.
- b. Ensure the outcomes are explicit PRIOR to the meeting.
- c. Ensure follow-up documentation.



## Chat Discussion

Of the 3 types of meetings discussed today, which ones do you feel you spend the majority of your time in?

### Meeting Types:

Information Sharing  
Information Gathering  
Problem Solving

Which type(s) of meeting do you believe you need to spend more time in to achieve better outcomes?

## Meeting Follow-Through

### Important Practices

1. Follow-up meeting recap - **IN WRITING**
  - a. Within 24 hours
  - b. Identify key decisions
  - c. Identify action items and deadlines
2. Implement a tool like RACI (Responsible, Accountable, Consulted, and Informed) to keep projects on track.
3. Share wins and track progress in each subsequent meeting.



## Practical Tools to Improve Meetings

1. **Assign meeting roles.**
  - a. Improves engagement.
  - b. Lightens the load.
  
2. **Standardize meeting agendas.**
  - a. Increase meaningful preparation.
  - b. Sets expectations for meaningful meetings.
  
3. **Develop meeting “Report Cards.”**
  - a. Encourages engagement.
  - b. Provides path for improvement.



## Elevating Meeting Engagement

- Facilitator
- Meeting Leader
- Gatekeeper
- Recorder/Minute-Taker
- Timekeeper
- Contributor
- Vibe Watcher



## *Standardize a Meeting Agenda*

<b>Date:</b>	<b>Time:</b>	<b>Attendees:</b>
<b>Topic 1</b> <b>Topic leader</b> <b>Objective</b> <b>Process</b> <b>Follow-through actions</b>		
<b>Topic 2</b> <b>Topic leader</b> <b>Objective</b> <b>Process</b> <b>Follow-through actions</b>		
<b>Topic 3</b> <b>Topic leader</b> <b>Objective</b> <b>Process</b> <b>Follow-through actions</b>		

## *Evaluating Your Meetings: Meeting Report Cards*

Date \_\_\_\_\_ Meeting Title \_\_\_\_\_

	Strongly Agree					Strongly Disagree				
	1	2	3	4	5	1	2	3	4	5
1. The meeting started and ended on time.	1	2	3	4	5					
2. I felt engaged and had opportunities to contribute.	1	2	3	4	5					
3. Purpose and agenda were clear throughout the meeting.	1	2	3	4	5					
4. Key action items were clearly defined.	1	2	3	4	5					
5. One thing that worked well:										

6. One thing that could be improved: \_\_\_\_\_

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## Questions or Thoughts?

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