

How to Master Medical Staff Meetings



Leadership Lift Cards

Fast, Fun Learning Activities to
Lift Your Leadership Confidence.

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Your voice counts.

These Card activities are meant to add to what you already know. All decisions and results are yours. The authors make no warranties of any kind, express or implied, about the content.

HOW TO MASTER MEDICAL STAFF MEETINGS ROADMAP

Do you understand your Medical Staff structure and meeting mechanics?

No
→

NUTS & BOLTS
(CARDS 1-3)

Yes
↓

Can you describe roles that Med Staff Chief, CEO and CNO play at Medical Staff meetings?

No
→

ROLES
(CARDS 4-6)

Yes
↓

Do you have a clear idea how to prepare for a regular Medical Staff meeting?

No
→

PREPARE
(CARDS 7-9)

Yes
↓

Do you know how to encourage meaningful Medical Staff meeting participation?

No
→

ENCOURAGE
(CARDS 10-12)

Yes
↓

Does your team know how to effectively followup to Medical Staff concerns?

No
→

FOLLOW UP
(CARDS 13-15)

Yes
↓

Keep building those effective, rewarding relationships with Medical Staff!

Dream big, act bold.

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Confidence fuels success.

BY-LAWS TREASURE HUNT

In this activity you'll embark on an engaging journey to uncover hidden treasures in the Medical Staff By-Laws.

You'll explore the By-Laws and seek out key details amidst the clauses and jargon.

By transforming the task into a learning adventure, you'll deepen your understanding of the Medical Staff structure and mechanics.

The results? Confidence and energy to move forward.

BY-LAWS TREASURE HUNT

1: Map it Out: Create a map of the Medical Staff By-Laws, dividing it into sections like “Purpose”, “Membership Categories”, “Officers”, “Committees” and “Meetings”.

2: Team Up: Pair up with a partner. You'll both be treasure hunters on this adventure.

3: Equip Yourself: Arm yourselves with highlighters, sticky notes.

4: Embark on the Hunt: Set out to explore the Medical Staff By-Laws, hunting for key information from the sections above.

5: Discover the Treasures: As you uncover important details, mark them on your map with colorful symbols or annotations.

6: Compare Findings: Once you've thoroughly explored the By-Laws, compare with your partner. Discuss any differences or questions you have about what you've found.

7: Celebrate Your Success: Once you feel confident in your knowledge of the By-Laws, celebrate your treasure hunt triumph.

Share what you've learned with someone to spark energy and build confidence.

MEETING MECHANICS

Here you will focus specifically on the section related to “Meetings” in the Medical Staff By-Laws.

The purpose is to ensure that you have a clear understanding of the meeting rules, regulations, and procedures outlined in the By-Laws to support effective meetings.

By breaking down the By-Laws into digestible sections and creating personalized guide sheets, you’ll build confidence quickly.

MEETING MECHANICS

How about a "Bylaws Guide Sheet Creation" activity? Work with a partner on this.

1: Section Breakdown: Divide the Meetings section into smaller, manageable sections or topics. Assign each person to a different section.

2: Individual Study: Both thoroughly study their assigned section, highlighting key points, rules, procedures, and any important details they find.

3: Collaborative Review: Gather together and talk through key points from that section.

4: Guide Sheet Creation: Work together to create a short, easy-to-reference guide sheet for the Meetings section of the By-Laws.

5: Personalization: Personalize your sheet however you want to help you navigate the Meeting structure in the future.

POP QUIZ WITH A TWIST!

Ah, the dreaded pop quiz—everyone’s arch-nemesis. But fear not, because today's challenge brings a twist! We're diving into the world of Medical Staff By-Laws, turning mundane memorization into an engaging quest for knowledge.

Get ready to test your understanding of the Purpose, Membership Categories, Officers, Committees, and Meetings with a quiz that's as entertaining as it is educational.

POP QUIZ WITH A TWIST!

After you've completed Card 1 "By-Laws Treasure Hunt" and Card 2 "Meeting Mechanics" activities, write your answers to these questions. Discuss with a partner.

- 1: What are the primary purposes of the Medical Staff By-laws?*
- 2: How many membership categories are in the By-laws?*
- 3: Who holds authority to appoint or elect Medical Staff Officers?*
- 4: What are the typical roles/ responsibilities of Medical Staff Officers?*
- 5: How are committees established within the Medical Staff structure?*
- 6: What are the key functions of the Credentials Committee?*
- 7: How often are regular Medical Staff meetings typically scheduled?*
- 8: Who is responsible for setting the agenda for Medical Staff meetings?*

Share and compare answers.

ROLE RESPONSIBILITIES

Here you'll review the roles of the Chief of Medical Staff (CMS), Chief Executive Officer (CEO) and Chief Nursing Officer (CNO) per your Medical Staff By-Laws.

You'll meet together to discuss roles and how to effectively lead and support Medical Staff meetings.

Together, these key roles foster a culture of collaboration and excellence.

Others will notice. And patients will ultimately benefit.

ROLE RESPONSIBILITIES

First review these role definitions.

1: Chief of Medical Staff (CMS). (Think "Clinical Conductor")

In this role, the CMS harmonizes diverse medical expertise, ensuring a unified approach to patient care. Responsibilities include guiding discussions on care strategies, conducting clinical reviews, and fostering collaboration across disciplines. The CMS balances clinical innovation with practicality to enhance patient care during meetings.

2: Chief Executive Officer (CEO). (Think "Vision Virtuoso")

The CEO provides strategic leadership and direction to the hospital. Duties involve setting the meeting's tone, articulating the hospital's mission and goals, and aligning staff initiatives with organizational strategy.

3: Chief Nursing Officer (CNO). (Think "Care Choreographer")

The CNO coordinates patient care seamlessly, managing resources and ensuring quality improvement. Responsibilities include leading discussions on nursing practice and patient safety. With precision, the CNO directs compassionate care, inspiring confidence among staff and patients.

Now convene all three together and discuss how each of you will fulfill these roles in your Medical Staff meetings.

PRACTICE MAKES PERFECT

Here's your chance to practice the roles you identified after Card 4 "Role Responsibilities".

In this activity, the Medical Staff Chief (CMO), Chief Executive Office (CEO) and Chief Nursing Officer (CNO) work together through discussion and resource sharing to navigate meeting dynamics.

The purpose here is to empower all three leaders with the skills to manage meetings effectively to drive positive change across the organization.

PRACTICE MAKES PERFECT

1.Initiate an informal meeting among the CMO, CEO, and CNO. Work through items 2-5 and discuss where views are similar and where they might diverge.

Leave with agreement on roles going forward.

2: Outline Responsibilities: Define Medical Staff Meeting duties aligned with role descriptions and organizational expectations, ensuring clarity and accountability.

3: Provide Context: Demonstrate how the meetings drive collaboration, decision-making, and quality improvement.

4: Discuss Meeting Dynamics: Explore meeting specifics, emphasizing collaborative processes and decision-making frameworks.

5: Offer Feedback: Provide constructive feedback, identifying strengths and areas for improvement tailored to each other.

For follow-up, schedule regular check-ins to address challenges and ensure thriving leadership in Medical Staff meetings.

REFLECT AND REVITALIZE

Reflecting on past Medical Staff Meetings allows you to assess what worked well and areas for improvement. This reflection gives you space to identify where you can enhance your own performance.

Develop goals tailored to specific areas, like contributing insights or leading discussions. Track your progress and adjust goals as needed, ensuring continuous growth.

This process fosters personal development and strengthens your role in Medical Staff meetings, ultimately improving collaboration and patient care.

REFLECT AND REVITALIZE

Here's a four-step process for setting personal goals for your performance at regular Medical Staff meetings:

1: Reflection: Take a moment to reflect on your past experiences in Medical Staff meetings.

Consider what went well, what could have been improved, and any specific areas where you want to improve.

2: Identify Areas for Improvement: Based on your reflection, identify specific areas where you would like to set goals for improvement.

Examples might be active participation, or leadership in advocating for nursing perspectives.

3: Set goals tailored to the areas you identified for improvement. For example, your goal could be to actively contribute at least two meaningful insights each meeting, or to lead a discussion on a nursing practice issue once a quarter.

4: Track Progress and Adjust: Keep track of your progress toward your goals and adjust as needed.

The result: make a key contribution each meeting - and feel the rush of satisfaction advancing patient care causes.

MENU OF MEETING TOPICS

Here we convene with the Chief of Medical Staff to discuss topics for the upcoming Medical Staff meeting.

Each topic is presented alongside a brief description, for clarity.

This is a great opportunity to foster collaboration and enable energizing, engaged Medical Staff meetings.

MENU OF MEETING TOPICS

Set time for a 1:1 meeting with the Chief of Medical Staff.

1: Compile a list of potential agenda topics for the Medical Staff meeting, covering updates on hospital initiatives, patient care issues, and educational presentations.

2: Create opportunities for the Medical Staff to give input into the agenda.

3: Collect feedback on selected topics, including time for additional comments or suggestions.

4: Present the topics to the Chief of Medical Staff for final review and approval. Prioritize topics (See Card 8 “Prioritize the Agenda”) and allocating agenda time (See Card 9 “Time Triage”).

5: Share the finalized agenda with the Medical Staff, expressing appreciation for their participation and emphasizing the collaborative nature of the meeting planning process.

PRIORITIZE THE AGENDA

This activity presents a method to work with the Medical Staff Chief to prioritize agenda items for the Medical Staff meeting.

The idea here is to make sure all required agenda items get covered, and that important agenda topics get appropriate time for discussion.

The result: more effective, engaging meetings for all.

PRIORITIZE THE AGENDA

List all meeting agenda items on a whiteboard or document, including all topics, tasks, or decisions requiring attention.

1: Urgency and Importance Assessment.

First identify required agenda items from internal documents or regulatory agencies.

2: A tool called the Eisenhower Matrix helps prioritize.

Make a grid on a sheet of paper or whiteboard.

Place each item into one of four quadrants:

- Quadrant 1 (Urgent and Important): Address immediately.
- Quadrant 2 (Important but Not Urgent): Plan for future action.
- Quadrant 3 (Urgent but Not Important): Delegate or defer.
- Quadrant 4 (Not Urgent and Not Important): Postpone or eliminate.

3: Agenda Prioritization.

Organize items by Matrix prioritization:

Start with Quadrant 1, then Quadrant 2.

Defer Quadrant 3 items.

Avoid Quadrant 4 unless necessary.

4: Create the Meeting Agenda.

Structure agenda in prioritized order, starting with Quadrant 1.

Share in advance, emphasizing priorities and outcomes, ensuring focus on critical issues for optimal use of time and resources.

TIME TRIAGE

In this activity you'll review and prioritize agenda time on the upcoming Medical Staff meeting. You'll assess each item's importance, complexity, and time requirements, ensuring efficient time use.

The idea is to address critical topics such as patient care updates, quality improvement initiatives, and policy discussions first.

By allocating appropriate time to each agenda item and prioritizing based on urgency and importance, you'll optimize meeting effectiveness.

TIME TRIAGE

1: Compile Agenda Items.

By using Card 7 “Menu of Meeting Topics”, Card 8 “Prioritize the Agenda”, Card 9 “Time Triage” card, the agenda items should be clear. Now you are budgeting time for each agenda item.

2: Estimate Time Needed.

Estimate the time required for each agenda item, factoring in complexity, participant numbers, and potential discussion.

Allocate appropriate time to ensure critical topics receive due attention without overshadowing less urgent matters.

3: Prioritize Agenda Items.

Rank agenda items by importance and urgency, focusing on key topics vital for meeting objectives and staff needs. High priority items get more time.

4: Finalize Time Budget.

Finalize the meeting's time budget based on estimated item times and prioritization. Assign specific time slots to each item, accounting for start and end times.

SETTING THE TONE

Senior leaders set the tone for any meeting. Attitude, expressions, tone of voice - any verbal or nonverbal cue - will either encourage participation or quickly freeze discussion.

This activity is your chance to add-to what you already know about senior leader mindsets and behaviors to set a constructive tone.

The idea here: draw out the best in other people during Medical Staff meetings so everyone brings their entire selves to serving the community.

SETTING THE TONE

Gather the senior team. Explain that the purpose of the exercise is to identify the mindset and behaviors needed for a leader to set an engaging tone.

1: Each person handwrites answers to the following:

- *What mindset is needed so that a healthcare senior leader encourages Medical Staff participation during Medical Staff meetings?*
- *Describe the top three behaviors that would be observed when a leader sets a very positive, participative tone.*

2: Each person shares what they wrote.

3: Group discussion will compare and contrast answers.

4: At the end of this meeting, set another meeting with the same players to provide feedback to one another about the tone of any recent Medical Staff meetings.

SHADOW A PROVIDER

The idea here is to build relationships between administrative leaders and Medical Staff member to build even more trust over time.

Make arrangements to shadow a caregiver. What better way to learn that person's actual experience?

The result? A closer Medical Staff and administration working relationship to advance common initiatives.

SHADOW A PROVIDER

Build a deeper relationship by walking in the caregiver's shoes. Of course follow all HIPAA, Federal, State, local and organizational policies and procedures.

1: Coordinating Schedules.

Organize a mutually convenient time for the shadowing experience, respecting the schedules of both the caregiver being shadowed and the individual.

2: Clarifying Objectives.

Engage in discussions to establish clear objectives and expectations for the shadowing experience, ensuring a focused exploration of patient care practices within the rural hospital and clinic.

3: Preparing for the Experience.

Review schedules and addressing logistical details to ensure a smooth and productive shadowing experience.

4: Concluding with Feedback.

Conclude the shadowing experience with a feedback session to share insights and reflections, promoting ongoing learning and understanding within your organization.

STAMP OUT DEFENSIVENESS!

The aim is to advance a culture of openness and innovation by reducing potential leader defensiveness.

Here participants will receive prompting questions beforehand to reflect on their experiences around the topic of defensiveness.

During the activity, participants will discuss their insights in smaller groups, allowing for deeper exploration.

Sharing common themes will build trust and open communication channels to enhance patient care.

STAMP OUT DEFENSIVENESS!

Invite your senior team.

Explain that innovation requires candid feedback, so it helps to build skills to reduce defensiveness.

1: Distribute the following questions at least 5 days before the meeting. Ask each person to handwrite answers to the questions before the meeting.

- *Defensiveness destroys communication because _____.*
- *Defensiveness from a senior leader is even more chilling to conversation because _____.*
- *Defensiveness looks like this (list three descriptions)*
- *Here are three tips to manage defensive feelings (describe)*
- *Managing defensiveness at Medical Staff meetings (and elsewhere helps patients because _____.*

2: Divide into groups of 3-4. Individuals share and compare.

3: Reconvene. Each group reports out results.

4: Record common themes on a whiteboard/flipchart.

5: Together, identify behavioral standards that can be used to guide future behavior and reduce defensiveness.

AMPLIFIED ACTIVE LISTENING

As Stephen R. Covey famously said, "Most people do not listen with the intent to understand; they listen with the intent to reply." We're taking this wisdom to heart and focusing on truly understanding before we respond.

This activity helps you further develop your active listening abilities. It's all part of a culture where every concern is valued and addressed effectively.

The aim here is to build trust and collaboration with the Medical Staff (and all colleagues), ultimately leading to better care for patients.

AMPLIFIED ACTIVE LISTENING

For this activity you will need a trusted confidant.

1: Self-Assess. On your own, consider three listening problems:

- You don't know how to listen.
- You know how, but don't do it enough.
- You listen intently to some, so-so to others, and not at all to even others.

Write your answers to these prompts:

- *Write an example where you know you demonstrated excellent listening. Now write an example when you didn't.*
- *Where might you exhibit "listening killers"? (interruptions, finishing sentences, etc).*
- *Do you listen differently in different circumstances (different messenger, under duress, etc).*
- *How does more effective active listening help you follow-up better to Medical Staff concerns?*

2: Now share your self-assessment writing with a confidant.

Ask that person:

- Where do you agree?
- What did I miss?
- Solicit improvement ideas

3: Commit to three actions to improve your active listening.

4: Create a written plan to circle back to discuss progress.

FRIENDLY FOLLOW-UP FORUMS

Following up to Medical Staff concerns is a fantastic way for a healthcare leader to create trust and build productive, lasting relationships.

This doesn't mean every provider idea must be pursued. The key is to listen attentively and respond - one way or another - in a timely manner with information and rationale for decisions.

This activity is your chance to get the gift of direct feedback from some Medical Staff members. You'll better understand follow-up expectations and build a stronger working relationship.

FRIENDLY FOLLOWUP FORUMS

1: Meet with three Medical Staff providers (individually or together). Provide structured questions ahead of time as prompts:

Please recall a recent instance where you provided a suggestion or idea to me. How would you rate my follow-up on that suggestion?

Please share a time when you felt I followed up effectively on one of your suggestions or ideas? What made that follow-up successful?

On the flip side, can you think of a specific occasion where you felt my follow-up on your suggestion could have been improved?

What are some approaches I could adopt to enhance my follow-up on suggestions from in the future?

2: Listen attentively to the feedback. Take notes.

3: Based on the feedback, handwrite an action plan.

4: Commit to regular check-ins to track progress and solicit ongoing feedback.

FOCUS ON THE FOLLOW-UP

This interactive session aims to enhance your ability to more effectively address concerns raised by your Medical Staff.

Through group activities and role-playing scenarios, you'll learn how to respond even more effectively to Medical Staff concerns.

By honing these skills, you'll build even more trust and collaboration with your Medical Staff, ultimately improving care for your community.

FOCUS ON THE FOLLOW-UP

Invite your senior team. The purpose of this activity is to learn how to even more effectively address concerns raised at Medical Staff meetings.

Explain you'll cover six key follow-up concepts:

1) Prompt Communication; 2) Active Listening;
3) Assign Responsibility; 4) Timely Action Plans;
5) Regular Updates; 6) Resource Allocation.

1: Write the six follow-up concepts across a whiteboard.

2: Pair off. Each pair answers the following questions for each concept:

- *What actions make this followup concept come to life?*
- *What skills are needed for each followup concept?*
- *What is the standard for this followup concept for our organization?*

3: Reconvene as a small group. Share and compare answers. Make notes on the whiteboard.

4: Team Reflection. Reflect on key takeaways, discuss challenges and concerns, and commit to applying action steps moving forward.

Lead with heart, inspire with vision

**Build credibility with medical staff.
Navigate conflict with professionalism.
Build consensus and shared decisions.**

Leadership Lift Cards get you there.

ABOUT THE AUTHOR

Doug Morse, Principal, ExecHQ is a former rural hospital CEO, network system executive and lifelong rural healthcare zealot. He knows hospitals and clinics are engines that drive a community way of life. Today he helps rural hospital C-Suites and Boards grow the organization and rally stakeholders through entrepreneurial strategic planning and leadership education. He holds an MBA and MA (Master of Hospital and Health Administration) from the University of Iowa. Doug was twice recognized as a college faculty Teacher of the Year, and years ago was recognized with the Iowa Hospital Association Young Executive Achievement Award. He and his wife Ann have three grown children. Find more at www.ruralzealot.com.