Welcome to the third set of Concurrent Sessions in the 38th Annual ASPSN Convention curricula. This is the management track session on how to run an effective staff meeting.

How many in the room participate in the team at the direct care clinician level? Charge? Unit Management? Director? C-level?

How many work within a private practice? An ASC? A Hospital?

How many are the only nurse in the practice? How many lead a team of nurses? How many lead a team of support professionals? How many lead multiple departments? How many lead an executive team? As you can see from looking around the room, we represent a diverse reality within nursing leadership.

How many in the room participate in staff meetings? Have a significant role in staff meetings? Are responsible for leading the staff meeting?

How many love staff meetings and find every meeting to be both productive and worth the time, drawing full participation from all involved?
Learning Objectives

• The participant will be able to:
  ◦ Identify key effective elements of a staff meeting
  ◦ Explain how the understanding of staff personality types adds to the success of meetings

The vision of this workshop is to provide you with a tangible framework for running effective staff meetings that drive the organization forward and develop the staff professionally. Within this tangible framework, you will benefit from being able to identify key effective elements of a staff meeting as well as being able to explain how the understanding of staff personality types adds to the success of meetings.
Disclosure Statement

- I have no conflicts of interest to disclose.
Another meeting?!?

• What are the most frustrating aspects of staff meetings for you?

• What are the most frustrating aspects of staff meetings for the staff?

• How do they compare?
An effective staff meeting...

- utilizes organizational purpose to evaluate the gap between what is and what could (should?) be, systematically encouraging the team to use their voice to drive growth and expand the idea of what is possible.

- Requires a balance of leadership and management skills.
Key Elements for Effective Meetings

- Envision possibility
- Evaluate the issues at hand
- Establish a plan of action
- Ensure timeliness
- Empower the team
Envision Possibility

• A leadership task before the meeting
• Requires casting a written vision of
  ▫ The Organization
  ▫ The Team
  ▫ The Meeting
  ▫ Yourself
• Avoids the pitfall of myopia
Envision Possibility - Organization

- Review Mission/Vision/Values
- Assess the organizational effectiveness of the strategic plan
  - Identify systemic myopia
  - Identify systemic successes
  - Identify dangerous “Sacred Cows”
- Visualize the gap between what is and what could be
- Push the envelope of what could be
Envision Possibility - The Team

- Review the team’s purpose - how the team can best contribute to the organizational strategic plan
- Cast a clear vision of “The Perfect Team”
- Systematically identify each team member’s unique talents and ability to contribute
  - Personality
  - Performance
  - Potential
  - Life Circumstances
Envision Possibility – The Meeting

- Measurable Outcome of Meeting
- Firm time for the meeting
- Detailed agenda for the meeting distributed one week prior to the meeting for feedback
- Delegated action items for the meeting sent with a agenda
- Required attendees
Envision Possibility - Yourself

- How strong is your voice?
- Do you give voice to others?
- How strong is your vision?
- Do you respect the established time?
- Do you allow others the space to work within their personality?
- Do you listen actively and empathetically?
- Do people follow begrudgingly, willingly, or excitedly?
Committing to self-evaluation at regular intervals is an integral part of self-development.

Utilizing the time involved in planning staff meetings integrates well into the leader’s busy schedule.
Key Elements for Effective Meetings

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Evaluate the Issues at Hand

- A well established agenda allows for team member feedback and preparation
  - Invite team members to submit items to the agenda that they would like to talk about.
  - Evaluate the requested line items against the meetings purpose to determine appropriateness.
  - Establish the expectation of preparation
Evaluate the Issues at Hand

- Present the issue to the group
- Guided discussion based on:
  - Mission
  - Vision
  - Values
  - Team Purpose
  - Current Workload
  - “Gut Check”
Evaluate the Issues at Hand

- Stay within established time limit
- Stay on task
- Maintain reason in evaluation
- Set the bar high for the team to engage in a meaningful discussion
- Allow time after adjournment for people to chit-chat.
Key Elements for Effective Meetings

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Establish a Plan of Action

- Based on Evaluation of the Issues:
  - Decide action items and tabled items
  - Set SMART goals for each action item
  - Delegate to the “best” person
  - Ask what the team needs from you to make this happen and follow where necessary
  - Determine follow-up meeting and clear consequences for not preparing
Key Elements for **Effective Meetings**

- Envision possibility
- Evaluate the issues at hand
- Establish a plan of action
- Ensure timeliness
- Empower the team
Ensure Timeliness

• Set time for the meeting
  ▫ Time of Day
  ▫ Length
  ▫ Regular?

• Set time limits for line items
  ▫ Stay firm with these
  ▫ Rigid - Items not within time are tabled and another meeting is scheduled for many tabled items
  ▫ Flexible - Extend meeting length with unanimous permission, established at the start of the meeting
Key Elements for **Effective Meetings**

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- Empower the team
Empower the Team

• So far, we’ve:
  ◦ Personalized the process
  ◦ Capitalized on and showcased talent
  ◦ Established accountability
  ◦ Encouraged team work
  ◦ Respected time
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Empower the Team

• Empower the team within the meeting
  ◦ Review purpose and timeline of meeting at the start of meeting
  ◦ Establish meeting rules, timekeeper, and whether to table line-items that need discussion beyond the established timeline or to establish another meeting to handle unfinished business
Empower the Team

• Empower the team within the meeting
  ◦ Formally evaluate the effectiveness of the meeting, requiring an email within 24 hours answering:
    ○ Did we meet our objective?
    ○ Were the people here that needed to be here?
    ○ What could we have done better?
    ○ Did you feel like your voice was heard?
Empower the Team

• Empower the team-member within the team
  ◦ Team dynamics can be difficult to manage
  ◦ Personality typing has made these dynamics somewhat symptomatic
  ◦ Many personality typing tools are available
Empower the Team

- Kiersey Temperament Sorting
  - Four Different Temperaments with Four Different Subtypes
    - Artisan
    - Guardian
    - Rational
    - Idealists
Empower the Team

<table>
<thead>
<tr>
<th>ARTISAN</th>
<th>GUARDIAN</th>
<th>RATIONAL</th>
<th>IDEALIST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promoter</td>
<td>Supervisor</td>
<td>Fieldmarshal</td>
<td>Teacher</td>
</tr>
<tr>
<td>(ESTP)</td>
<td>(ESTJ)</td>
<td>(ENTJ)</td>
<td>(ENF)</td>
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<tr>
<td>Crafter</td>
<td>Inspector</td>
<td>Mastermind</td>
<td>Counselor</td>
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retrieved from www.keirsey.com

*Temperament* is a configuration of observable personality traits, such as habits of communication, patterns of action, and sets of characteristic attitudes, values, and talents. It also encompasses personal needs, the kinds of contributions that individuals make in the workplace, and the roles they play in society. Dr. David Keirsey has identified mankind's four basic temperaments as the Artisan, the Guardian, the Rational, and the Idealist.

Each temperament has its own unique qualities and shortcomings, strengths and challenges. What accounts for these differences? To use the idea of Temperament most effectively, it is important to understand that the four temperaments are not simply arbitrary collections of characteristics, but spring from an interaction of the two basic dimensions of human behavior: our communication and our action, our words and our deeds, or, simply, *what we say and what we do*.

**Communication: Concrete vs. Abstract**
First, people naturally think and talk about what they are interested in, and if you listen carefully to people's conversations, you find two broad but distinct areas of subject matter.
Some people talk primarily about the external, concrete world of everyday reality: facts and figures, work and play, home and family, news, sports and weather -- all the who-what-when-where-and how much's of life.
Other people talk primarily about the internal, abstract world of ideas: theories and conjectures, dreams and philosophies, beliefs and fantasies -- all the why's, if's, and what-might-be's of life.
At times, of course, everyone addresses both sorts of topics, but in their daily lives, and for the most part, Concrete people talk about reality, while Abstract people talk about ideas.

**Action: Utilitarian vs. Cooperative**
Second, at every turn people are trying to accomplish their goals, and if you watch closely how people go about their business, you see that there are two fundamentally opposite types of action.
Some people act primarily in a utilitarian or pragmatic manner, that is, they do what gets results, what achieves their objectives as effectively or efficiently as possible, and only afterwards do they check to see if they are observing the rules or going through proper channels.
Other people act primarily in a cooperative or socially acceptable manner, that is, they try to do the right thing, in keeping with agreed upon social rules, conventions, and codes of conduct, and only later do they concern themselves with the effectiveness of their actions.
These two ways of acting can overlap, certainly, but as they lead their lives, Utilitarian people instinctively, and for the most part, do what works, while Cooperative people do what's right.

**The Four Temperaments**
As Concrete Cooperators, Guardians speak mostly of their duties and responsibilities, of what they can keep an eye on and take good care of, and they're careful to obey the laws, follow the rules, and respect the rights of others.

As Abstract Cooperators, Idealists speak mostly of what they hope for and imagine might be possible for people, and they want to act in good conscience, always trying to reach their goals without compromising their personal code of ethics.

As Concrete Utilitarians, Artisans speak mostly about what they see right in front of them, about what they can get their hands on, and they will do whatever works, whatever gives them a quick, effective payoff, even if they have to bend the rules.

As Abstract Utilitarians, Rationals speak mostly of what new problems intrigue them and what new solutions they envision, and always pragmatic, they act as efficiently as possible to achieve their objectives, ignoring arbitrary rules and conventions if need be (http://keirsey.com/4temps/overview_temperaments.asp).

http://keirsey.com/4temps/overview_temperaments.asp
Empower the Team

• Alphabet Soup

<table>
<thead>
<tr>
<th>TECHNICAL TERMS</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>(E)</strong> Extroversion</td>
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<td><strong>(I)</strong> Introversion</td>
<td>Attentive</td>
</tr>
<tr>
<td><strong>(S)</strong> Sensing</td>
<td>Observant vs.</td>
<td><strong>(N)</strong> Intuiting</td>
<td>Introspective</td>
</tr>
<tr>
<td><strong>(T)</strong> Thinking</td>
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<td><strong>(F)</strong> Feeling</td>
<td>Friendly</td>
</tr>
<tr>
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adapted from www.keirsey.com
Empower the Team

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http://keirsey.com/4temps/overview_temperaments.asp

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Empower the Team

- Empower the team-member within the team
  - Understanding our own personality type and how it relates to others allows us to operate within the space in which diversity is celebrated and judgment is avoided, in essence it allows unity within diversity.
  - Communication is effective when we know what people need to hear us as well as what keeps us from hearing others.
Key Elements for Effective Meetings

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Questions?

• Resources you may find helpful...
  ◦ S. R. Covey. (2004). The 8th Habit: From Effectiveness to Greatness.
  ◦ www.keirsey.com

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