Chairing Meetings with Patient and Caregiver Advisors:

A Best Practice Checklist for Health Care Professionals

Before You Get Started

As part of patient and caregiver engagement activities (e.g., committees, focus groups) you may be asked to chair meetings with patient or caregiver advisors. Some people may find this challenging, or may be uncertain about how to begin.

Use the checklist below to help you chair meetings in ways that make patient and caregiver advisors feel meaningfully engaged and supported. The checklist gives you key steps and practices that can help you along the way.

A Best Practice Checklist

☑ **Prepare the Patient and Caregiver Advisors Ahead of Time** – In order to actively participate in meetings, patient and caregiver advisors need to understand the background and context for discussion. As chair, it's your role to help them along this process.

Practice Tips: Create a pre-meeting information package and share it at least one week in advance. Include minutes from the last meeting, a draft agenda that includes key decisions that need to be made, and any background reading that can help prepare advisors.

☑ **Get to Know Participants** – Open the meeting by taking time to ask and understand who the advisors are, what brings them to the table, and the unique experiences and expertise they have to offer. As the meeting unfolds, try to draw from these details to pull each advisor into the discussion.

Practice Tips: Begin the meeting by asking all participants to do a round-table "check-in". Ask them to share their name, profession or area of interest, and one reason they're attending the meeting. This allows advisors to get to know the participants in the room right away. As chair, the check-in allows you to gain a sense of each participant's motivations for attending the meeting.

☑ **Manage Expectations Early** – Not all advisors will fully understand what actions your organization can and cannot take in response to the meeting. It's important that you make the possibilities and limitations of your organization clear in order to manage patient and caregiver advisors' expectations.

Practice Tips: As part of the "check-in", ask participants to share one thing they would like to achieve during the meeting. This allows you to get an early sense of advisors' expectations, and to correct unrealistic ones.

Ontario
Health Quality Ontario

☑ **Avoid Talking Too Much** – For chairs, less is more when it comes to talking. Your goal should be to support advisors to speak as much and as often as possible. Do your best to avoid talking too much, or centering discussion around you alone. When you do speak, try to offer neutral positions that validate the contributions of all participants.

Practice Tips: Spark discussion by asking open-ended questions that prompt long responses. Avoid breaking long silences right away. Silence often helps participants gather their thoughts before speaking. Wait at least five to seven seconds before breaking silence.

☑ **Balance Participation** – When meetings also include health care professionals, try to make sure they don't take up too much space in discussions. It's important that advisors feel comfortable and encouraged to partner with you and your colleagues to drive discussion together. Make it clear to your colleagues that, like health care professionals, patients and caregivers have valuable expertise to share that's rooted in their experiences with the health system.

Practice Tips: When advisors seem to be participating less than health care professionals, ask all participants to tackle a question in pairs. Try to mix groups so they include one advisor and one health care professional. Or, ask the room to take a moment to reflect on a question or issue independently before going around the room to take turns responding.

☑ **Keep Discussion On Track** – Discussions can sometimes veer off track, especially when advisors are sharing sensitive health experiences. When this happens, take a moment to validate the advisor's experience, offer them a separate space and time to talk more about it, and then try to re-focus the discussion. Try to avoid discussion from centering on the experiences of any one person.

Practice Tips: When discussion veers off track, try to use inoffensive transitions to re-focus it (e.g., "That's a great point. Is there a way we can relate it back to the topic we're discussing?"). Use a "parking lot" to keep track of unrelated issues and topics and reassure participants that you'll return to them another time.

☑ **Focus on Key Decisions** – As discussion unfolds, pause to take stock of the key decisions that need to be made and whether you're on track to make them. Consistently remind advisors of these decisions so they can focus their contributions in ways that help move them forward.

Practice Tips: Close the meeting by revisiting the key decisions you set out to make. As a group, create a list of follow-up actions required to respond to each decision, and who's responsible for it. Invite patient and caregiver advisors to lead some of the follow-up actions without being too pushy. This helps to build a shared sense of ownership and accountability over the meeting.

☑ **Follow-Up After the Meeting** – Following the meeting, let advisors know what you've done with their feedback. Patient and caregiver advisors want to see action come from the ideas and experiences they share with you.

Practice Tips: Share minutes and/or a summary report shortly after the meeting. Include details on any actions or responses that you or your organization are prepared to take in response to what you heard. Ask the advisors to review and respond to the summary and fill-in any details you may have missed.