**Preparing for a family meeting**

1. Ask the patient to confirm one or two key family carers and/or friends who they approve to be involved in medical and care planning discussions.
2. Conduct a family genogram to determine key relationships within the patient's family. It could be introduced thus: "Can I spend a few minutes just working out who is in your family?"
3. Seek the patient's permission to arrange a family meeting and ask if they have any particular issues/concerns or questions they would like discussed at the meeting.
4. Identify the most appropriately skilled person from the multidisciplinary team to convene the family meeting
5. Contact the primary family carer(s): provide an overview of purpose of the family meeting; offer to convene a meeting at a mutually acceptable time. Advise the carer that the meeting time will be confirmed in due course (i.e., once other attendees are arranged).
6. Determine which health care professionals should attend the family meeting. Invite key health care professionals based on the identified needs of the patient and family carer.
7. Confirm the family meeting time and location. Inform attendees of the scheduled start and finish time for the meeting. A comfortable room free of interruptions (including pagers and phones), tissues made available and conducive seating arrangements is recommended.

**Conducting a family meeting**

**Introduction**

1. Thank everyone for attending and introduce him/herself and invite others to introduce themselves and state their role.
2. Establish ground rules in a non patronsing way e.g. "We would like to hear from all of you, however if possible could one person please speak at a time, each person will have a chance to ask questions and express views." Request no interruptions such as phones etc.
3. Indicate the duration of meeting (recommended maximum time of 60 minutes).

**Determine the understanding of the purpose of the family meeting.**

1. Briefly outline the broad purpose of the family meeting (based on previous steps), and then confirm with the family and patient that their interpretation of the purpose of the meeting concurs.
2. Ask the patient/family if there are any additional key concerns, and if pertinent, prioritise these and confirm which ones will be attempted to be dealt with at this meeting
3. Clarify if specific decisions need to be made

**Determine what the patient and family already know**

1. Address specific objectives of the meeting (as previously determined).
2. 'Check in' periodically throughout with the patient and family carer to see if the discussion seems to be valuable and is in keeping with their needs
3. Offer relevant written or audiovisual resources
4. Identify other resources, including possible referral to other members of the multidisciplinary team. Suggest scheduling a follow-up meeting if pertinent.
5. Concluding the discussion

**Documentation and follow-up**

1. Document who was present, what decisions were made
2. Offer the patient/family a copy of the main content of the meeting and file a copy of this document in the patient's medical record.
3. Liaise with the primary family carer within a few days after the meeting to determine if the meeting was helpful
4. Maintain contact with the key family spokesperson, including attending scheduled follow-up meetings or telephone calls as needed.