

Facilitating Improvement Teams



Preparing and Managing Meetings



Exploring Meeting Resources

Resource 1: Agenda Templates

Handout 1A. Purpose/Nonpurpose Agenda Format

During the process of establishing the team, it is important to spend time aligning on the purpose and nonpurpose of the group. Once the purpose and nonpurpose are established, it is helpful to review these items during the initial meeting(s).

At this time, discuss the types of agenda items that will be addressed and those that will be avoided or passed along to another group based on this group's established purpose.

Team:

Members:

Date:

Purpose of the group <i>What brings you together and what do you hope to achieve?</i>	
Types of agenda items that WILL be considered	

Nonpurpose of the group <i>What is beyond the scope of this group?</i>	
Types of agenda items that WILL NOT be considered	

Handout 1B. Contemporary Agenda Format

Group:

Participants:

Date:

Time:

Location:

Item <i>List the topic to be addressed or task</i>	Type <i>Indicate the type of item: Information Sharing, Discussion, Action/Decision Point</i>	Person Responsible <i>List who will lead or facilitate for this item</i>	Time <i>Include clock time for each item</i>	Desired Outcome <i>Describe the purpose or intended goal of addressing this agenda item</i>

Materials:

Schedule for future meetings/events:

Handout 1C. Boxed-Agenda Format

Team:

Participants:

Date/Time:

Location:

Chairperson:

Facilitator:

Recorder:

Timekeeper:

Next Agenda Builder:

Purpose of Team:

Topic	I/D/A*	Desired Outcome	Facilitator	Start Time

* I: Information Sharing, D: Discussion, A: Action/Decision Point



Resource 2: Notetaking Templates

Handout 2A. Minutes Format

Group:

Date:

Time:

Participants:

Location:

Topic 1:
Discussion Summary:
Decisions/Assignments <ul style="list-style-type: none">•
General Comments <ul style="list-style-type: none">•

Topic 2:
Discussion Summary:
Decisions/Assignments <ul style="list-style-type: none">•
General Comments <ul style="list-style-type: none">•

Topics for Next Meeting <ul style="list-style-type: none">•	Date: Time: Location:
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Handout 2B. Sample Visual Record

Hamilton Park Middle School Leadership Team Meeting: May 5, 2004

Facilitator: Liz Rowland
Recorder: Maya Fair
Parent Rep: Dante Smith

Warm-Up

Spend 3-5 minutes with someone you don't know very well. Identify three things you have in common.

Research Update

Michelle Pelger summarized the research she reviewed on formative assessment. She shared the new common assessments developed by each grade-level team. Materials shared.

Integrated Curriculum

- Review implementation plans
- Patrick Wu will present during June 1-3 staff development days on using data from the common assessments
- Tom Matthews shared plans regarding the curriculum-mapping work that will take place during the summer

New Business

Sixth-grade teacher, Helen Shin, presented about a proposed idea for a fifth/sixth grade looping design for the next school year and requested feedback.

Key Elements

- Students stay with 5th grade teacher for either math/science or social studies/language arts block
- 6th grade teachers will team with 5th grade teachers
- Students will stay in the same group
- 6th graders will have the option to attend enrichment courses based on special interests (courses last for six weeks)

Feedback/Questions

- How do we know this is best for students?
- Will there be a homeroom teacher?
- Who will teach enrichment courses?

Next Steps

- All teachers are invited to submit their questions or concerns for further consideration

Other Items

- Next Meeting: May 28, 2005
 - Facilitator: Maya Fair; Recorder: Devin Jones; Parent Rep: Joe Davis



Exploring Meeting Resources

Resource 3: Documenting Outcomes Templates

Handout 3A. Closing a Meeting Successfully

Take care of leftovers.

Leave time to address any lingering questions or concerns. If time permits, follow up on any items that were tabled during the discussion.

Review action items. Review assignments.

Confirm that each person understands their responsibilities and any next steps. Provide deadlines for tasks that need to be done prior to the next meeting.

Highlight items for the next session.

Determine which items will be addressed in the next meeting. Ensure that group members are clear about any preparation they will need to do prior to the meeting.

Debrief.

Ask group members for feedback on how the meeting went.

Assess the work of the team periodically.

Provide time for the team to reflect on its progress on key goals and discuss how to better work together.

Handout 3B. Action-Planning Formats

Action Planning Format 1

Project:		
Task	Talent <i>(Person Responsible)</i>	Timeline

Action Planning Format 2

Create headings that will help your group plan and monitor progress toward your goal.

Goal:				
Task	Lead <i>(Person Responsible)</i>	Budget	Timeline	Progress Indicators/ Status

Handout 3B. Action-Planning Formats (continued)

Action Planning Format 3

Goal:	Indicators of Progress					
	Professional Development Activities/ Support Needed					
	Resources					
	Test Dates (Beginning & Ending)					
	Lead & Key Staff					
	Strategy/Activity					



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Resource 4: Debriefing Tools Templates

Handout 4A. Meeting Evaluation Form

How valuable was the meeting?

A waste of time 1 2 3 4 5 **Extremely valuable**

How effective was the facilitator?

Very ineffective 1 2 3 4 5 **Extremely effective**

How effective was the recorder?

Very ineffective 1 2 3 4 5 **Extremely effective**

How much were you able to contribute to the meeting?

I did not feel that my input was considered 1 2 3 4 5 **I felt my idea/ recommendation was considered**

What suggestions do you have for improving the next meeting?

Handout 4B. Meeting Appraisal Form

Consider modifying this form with based on the work or focus of your group. Identify any issues that may need to be examined or addressed.

1. We hold meetings only when we have a valuable agenda.

Never Infrequently Sometimes Regularly Consistently

2. The agenda is clear and directs the work of the group.

Never Infrequently Sometimes Regularly Consistently

3. Group members appear committed to the work.

Never Infrequently Sometimes Regularly Consistently

4. The group adheres to the community norms.

Never Infrequently Sometimes Regularly Consistently

5. The group has the knowledge to reach its decisions.

Never Infrequently Sometimes Regularly Consistently

6. Meeting energizers or warm ups are timely and used appropriately.

Never Infrequently Sometimes Regularly Consistently

7. Notes from the meeting are clear and accurate.

Never Infrequently Sometimes Regularly Consistently

8. Attention is paid to completing tasks as well as relationships among group members.

Never Infrequently Sometimes Regularly Consistently

9. Time limits are respected.

Never Infrequently Sometimes Regularly Consistently

10. Decisions are reached by consensus.

Never Infrequently Sometimes Regularly Consistently

11. The group uses a variety of strategies to solve problems.

Never Infrequently Sometimes Regularly Consistently

12. Action plans facilitate the effectiveness of the group.

Never Infrequently Sometimes Regularly Consistently

13. Contributions from all group members are valued and respected.

Never Infrequently Sometimes Regularly Consistently

14. Commitments are honored by group members.

Never Infrequently Sometimes Regularly Consistently

Handout 4C. Learning Team Survey

You may use all or part of this survey based on the purpose and goals of your group.

School:

Subject/Grade Level:

1. How many times have you met with your learning team? (circle one)

1-3

4-6

More than 7

Have not met

2. Select the rating (in the table below) that describes your feelings about these meetings.

Most negative (-)	1	2	3	4	5	6	7	8	9	10	Most positive (+)
Unproductive											Productive
Not task oriented											Task oriented
Not well facilitated											Well facilitated
Incompatible group members											Compatible group members
Less than honest communication											Honest communication

3. What, if any, are the positive impacts of these meetings on you personally or professionally?

4. Please describe any negative impacts or concerns you have had with these meetings.

5. On a scale of 1 (not much benefit) to 5 (a great deal of benefit), how would you rate the benefit of participating on a learning team?