Facilitating Effective Meetings
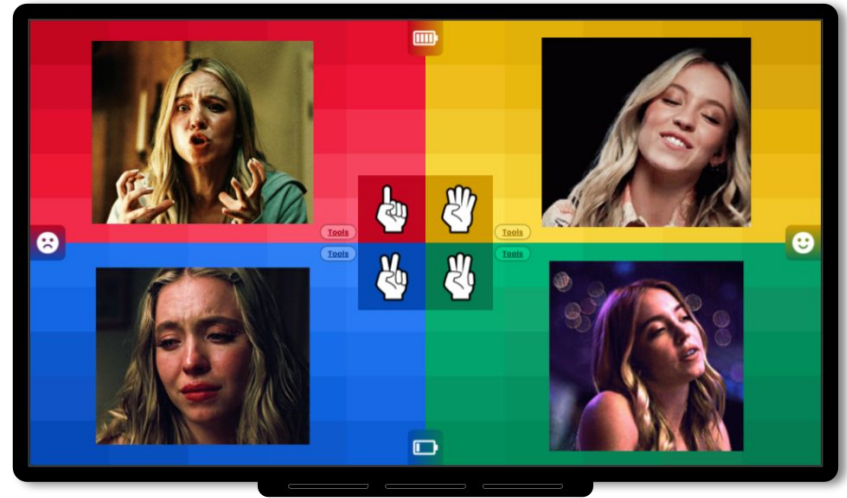
How to maximize time and move the work forward

@SCREDmn

Welcome!

Someone please pick a **GIF Mood Meter** for a quick check-in.

Nicole Woodward, Executive Director - SCRED

I am here to use my passion for people to create conditions for authentic connection, to model empathy and vulnerability, and to leverage the unique strengths of the collective, opening the hearts and minds of adults for the benefit of all children.

WHY?

"Your systems are perfectly designed to get the results you are getting"

~Stephen R. Covey

Engage.

Educate.

Empower.

Your Future.

Our Focus.

Be the place where every student is known, valued and challenged to succeed.

Inspire Dreams,

Build Integrity,

Instill Hope

Preparing our students for the future.

Create global citizens who are lifelong learners.

Maximizing outcomes through partnership.

How knowledgeable are you effective meeting facilitation?

	Label	What I'm Thinking
5	I'm an **expert**.	I understand this topic well and I could teach it to someone else.
4	I'm a **practitioner**.	I can mostly do this by myself but I sometimes mess up or get stuck.
3	I'm an **apprentice**.	I'm starting to get it, but I still need some coaching.
2	I'm a **novice**.	I'm just starting to learn this and I don't really understand it yet.
1	I'm a **blank slate**.	I read the title slide and have next-to-no idea what the topic is.

How interested are you?

	How I Feel	What I'm Thinking	What My Body is Doing	What I Can Do
5	**Exuberant**	'How long before I can ask a question?'	Eye contact, listening & comprehending	Stay engaged, hold onto questions
4	**Enthusiastic**	'I'm ready to learn.'	Listening, occasionally distracted	Ignore distractions and try to focus
3	**Intrigued**	'Let's see what you've got.'	Hearing, but not always listening	Listen for any useful ideas and info.
2	**Unsure**	'Maybe I'll be surprised.'	Checking clock, checking phone	Don't give up yet!
1	**Apprehensive**	'Get me out of here.'	Scowling, foot tapping	Respect group, voice concerns later

Our goals today:

1. Understand the importance of clarifying a team's purpose before meeting
2. Define the reasons teams should meet
3. Describe meaningful agenda design
4. Identify effective facilitation strategies to hear all voices

Think of the worst/most draining meetings you've attended. What made them bad?

Think of the best/most energizing meetings you've attended. What made them great?

You Can't Have a Meeting Without a Team:
Designing Teams with Purpose

Infrastructure for Continuous Improvement

Various **teams** functioning together like clockwork.

Necessary **resources** available (e.g., schedules, curriculum, training, coaching).

Implementation **plans** with shared accountability.

Data-Based Decision Making

Defining **who, what, when, and how we look at data** to guide decisions at the district-, school-, grade-, classroom-, and student level.

Family and Community Engagement

Building **relational trust** and **equitable partnerships** with families and school and district staff to create **shared responsibility** between all stakeholders.

Multi-Layered Practices and Support

A strong **Tier 1** (core) — upon which we can layer **Tier 2** (supplemental), **Tier 3** (intensive), or **special education** ("Tier 3 on steroids") supports.

Assessment

Collecting **universal screening** data, **progress monitoring** data, and more.

MnMTSS

Effective implementation is characterized by a team accountable for "making it happen."
-National Implementation Research Network (NIRN)

Home

MTSS

Multi-Layered Practices and Support

Infrastructure for Continuous Improvement

Assessment

Data-Based Decision Making

Family and Community Engagement

St. Croix River Education District / MTSS / Infrastructure for Continuous Improvement

Infrastructure for Continuous Improvement

🎥 **What does it mean?** These are the mechanisms in a system that support people as they work efficiently together.

This includes **teams** organized to work like clockwork, implementation **plans**, well-allocated **resources**, useful **technology**, etc.

Infrastructure provides the stability for initiatives to be installed, sustained, and improved independent of specific people.

Teamwork

The basic blueprint of teams in a district is explained below. Keep in mind that **team names will vary** and you also might create specialized **"satellite teams"** and/or **temporary work groups** that the teams below delegate tasks to.

The overarching goal is to organize our teams to work like clockwork. This means that:

- All of the essential tasks are getting done. We're not

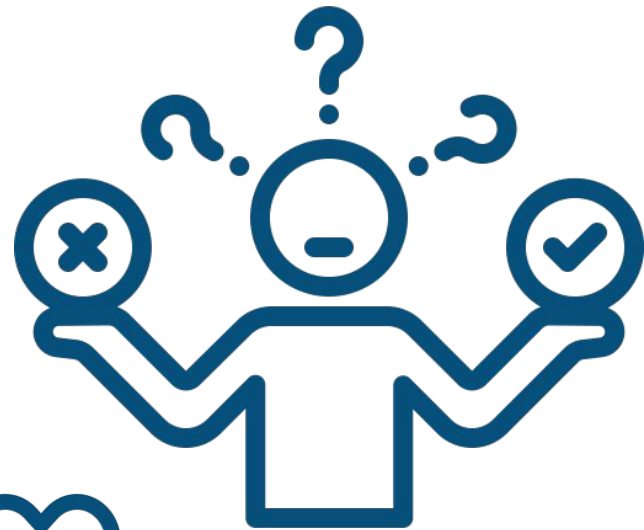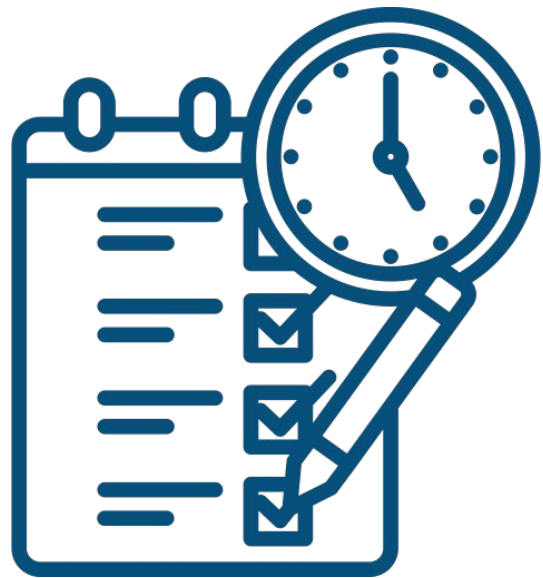| Administrative Team	Services Coordination	Implementation Team (I-Team)	Work Groups / Committees	PLCs / Service Area Teams
An executive leadership team meets monthly to **set the organizational vision**, **set goals**, and **ensure sufficient resources are allocated** to the implementation goals. The administrative team **oversees, leads, and evaluates implementation** of the strategic plan, making determination about what practices are "tight" and "loose" (i.e., requirements vs. recommendations) to **ensure consistency while allowing adaptations** based on specific needs of the stakeholders.	A leadership team meets to **reflect on data**, **plan for improvements**, and **support implementation** of the strategic plan. This includes coordinating with I-Team and various work groups/committees to **support the implementation goals**, **providing input into decisions** to ensure consistency while allowing adaptations based on specific needs of the stakeholders, and **providing input into the allocation of resources** to support the implementation goals.	A leadership team (AKA "**steering committee**") meets at least monthly to **reflect on both implementation data and outcome data**, **provide input on improvement efforts**, and r**eceive guidance and tools necessary to collaboratively support implementation** in member district buildings. This steering committee **works with the established member district leadership and teams** to **promote alignmen**t and **execution of the implementation goals**.	Small representative teams that focus on **producing guidance, resources, and professional learning around specialized topic areas** that span service areas. These teams r**eceive direction regarding implementation goals from the** Administrative Team, Services Coordination and/or I-team. There are intentional structures in place to ensure **meaningful collaboration and intentional communication** with leadership teams.	Small teams that **design and implement services and/or programming specific to the needs within their service are**a. **Outcome data is regularly reviewed and used to make determinations regarding service effectiveness**. Members e**ngage in ongoing professional learning to adjust and enhance practice in response to data.** There are intentional structures to ensure meaningful collaboration with other service areas and stakeholders.

Who are your teams? How clear are you on their purpose?

Meeting with Purpose

Why Meet?

Administrative Team	Services Coordination	Implementation Team (I-Team)	Work Groups / Committees	PLCs / Service Area Teams
An executive leadership team meets monthly to **set the organizational vision**, **set goals**, and **ensure sufficient resources are allocated** to the implementation goals. The administrative team **oversees, leads, and evaluates implementation** of the strategic plan, making determination about what practices are "tight" and "loose" (i.e., requirements vs. recommendations) to **ensure consistency while allowing adaptations** based on specific needs of the stakeholders.	A leadership team meets to **reflect on data**, **plan for improvements**, and **support implementation** of the strategic plan. This includes coordinating with I-Team and various work groups/committees to **support the implementation goals**, **providing input into decisions** to ensure consistency while allowing adaptations based on specific needs of the stakeholders, and **providing input into the allocation of resources** to support the implementation goals.	A leadership team (AKA "**steering committee**") meets at least monthly to **reflect on both implementation data and outcome data**, **provide input on improvement efforts**, and r**eceive guidance and tools necessary to collaboratively support implementation** in member district buildings. This steering committee **works with the established member district leadership and teams** to **promote alignmen**t and **execution of the implementation goals**.	Small representative teams that focus on **producing guidance, resources, and professional learning around specialized topic areas** that span service areas. These teams r**eceive direction regarding implementation goals from the** Administrative Team, Services Coordination and/or I-team. There are intentional structures in place to ensure **meaningful collaboration and intentional communication** with leadership teams.	Small teams that **design and implement services and/or programming specific to the needs within their service are**a. **Outcome data is regularly reviewed and used to make determinations regarding service effectiveness**. Members e**ngage in ongoing professional learning to adjust and enhance practice in response to data.** There are intentional structures to ensure meaningful collaboration with other service areas and stakeholders.

Meeting Title	Purpose	Details
Annual Retreat	Organizational health, organizational vision, build 1-year plan *How are we building a healthier team & smarter systems?*	Format: In-person Duration: Full Day in August
Weekly Tactical	Critical updates, Reporting out progress on objectives, identifying barriers, determining support *What work did you just wrap up? What are you focused on next? What stands in the way of progress?*	Format: Virtual Duration: 60 minutes
Monthly Topical	Internal professional learning, change initiative, & systemic problem-solving *How do we build our own capacity to be innovative, foster alignment in our services, and respond with agility when conditions change as we work toward our vision?*	Format: In-person Duration: 3 hours whole group; 3 hours small groups
Quarterly Strategic	Assess progress on our areas of focus for the year and formulate data-based adjustments to our plans for the next quarter. *What have we accomplished? What factors contributed to our progress? What barriers interfered with progress?*	Format: In-person Duration: 6 hours whole group

Facilitation Tools & Strategies

"Tell me and I forget. Teach me and I remember. Involve me and I learn."

~Benjamin Franklin

What are your go-to meeting tools?

Tool #1: Team Norms

Group norms are a set of agreements about how [team] members will work with each other and how the group will work overall. These agreed-upon behaviors allow the team to increase its collective [team] performance through healthy debate and clarity of purpose and roles."

~Harvard Business Review

Live Out Team Norms

* NORMS *

- Be fully **present and engaged** — mentally and physically
- We will be **clear in what we want to accomplish** together, remain committed to our strategic objectives, and **share ownership** of the work and the action(s) needed to get there
- We will be both **honest/forthright and respectful** — of those present and absent — when speaking, listening, and during disagreement
- Assume **positive intent** with space to unpack
- Stay **curious, open-minded, and solution focused** — avoid problem admiration

Tool #2: The Artful Agenda

Set the Team Up For Success

Time	Topic (Person)	Notes	Action Items / Timelines
9:00 - 9:10 10 min	Set up (Woodward)	• Welcoming routine (e.g., celebrations & gratitude, community building) • Assign roles ○ Facilitator: Woodward ○ Note Taker(s): Alyssa ○ Norm Guardian: Rob ○ Timekeeper: Christine • Review norms • Meeting focus and desired end result: ○ MORNING: Learn together and build our own capacity, prioritize projects, and coordinate our efforts. Take a moment to review agenda topics. ○ AFTERNOON: Break out into small groups to get stuff done.	N/A

Warm Welcome/Welcoming Routine

Why?

Builds community, establishes a sense of shared values, set the tone

When?

At the start of any regular meeting (or class!)

What?

Mood meter, two-word check-in, celebration, gratitude, brain dump, body scan, thought-provoking question(s), etc.

Choose an upcoming meeting and check for a welcoming routine. Don't have one? Add it! Don't like the one you have? Try a new one!

Assigning Roles (Because You Can't Do it All)
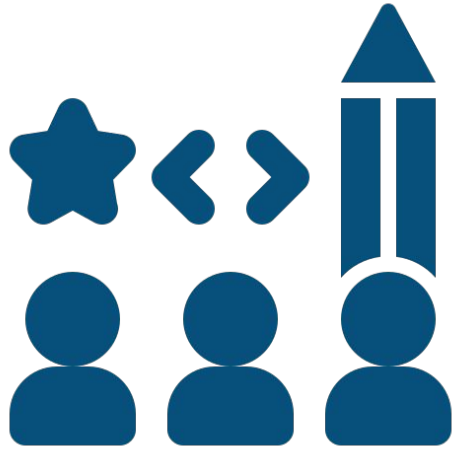
- **Facilitator:** leads the team and ensures that the meeting is productive. Keeps the discussion on track, encourages everyone to participate, and responds to any conflicts that may arise.

- **Note Taker:** records discussion points, decisions that are made, and any action items that are assigned.

Assigning Roles (Because You Can't Do it All), cont.
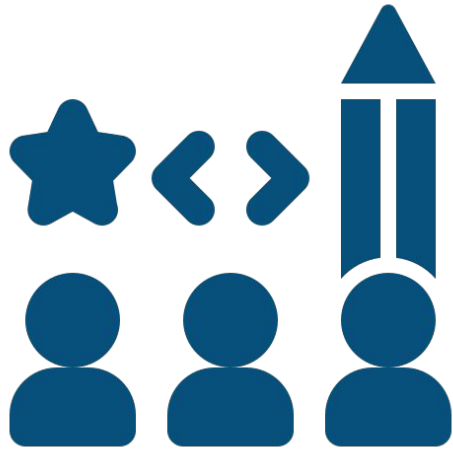
- **Norm Guardian:** reads the norms aloud at the beginning of the meeting to prime the team; highlights when the team is following a norm successfully or off track; might select a "norm of focus" for the meeting and share out brief, informal observations. Sometimes they might even decide to collect and share out data.

- **Time Keeper:** The timekeeper keeps the team on pace by interjecting reminders about how much time is left for each topic.

- **Chat Monitor**: Virtual meetings only, monitors chat and draws the facilitator's attention to comments and questions

The Heart of the Agenda: Do, Learn, Decide, Connect

Time	Topic	Notes	Action Items / Timelines

9:20 - 9:40
20 min
	SpEd Progress Monitoring Implementation	🤔 What does each SpEd team need for support to enhance data-based decision making implementation?
		
		"Where is this SpEd team **in these five areas**?" (continuous reflection) → "How do we know?" → "If this, do that"
		   1. The why
		   2. Graph setup
		   3. Data regularly entered
		   4. Data regularly reviewed and communicated
		   5. Data triggers intervention changes
		
		Glows🌟 & Grows🌱
		
		Action: Consider how we can keep this work at the forefront? Add to leadership agenda	

9:40 - 9:50
10 min
	Building/ district data routines (Nic & Academic team)	🤔 How/when can we weave big-picture data touchpoints into our building and district leadership teams throughout the school year?
		  ● The best case scenario is building in data routines/habits into our practice
		  ● Viewing data more frequently is important
		  ● **Ask: Inviting Services Coordinators and Special Services Supervisors to Administrative Meetings where you are reviewing data to partner in the "Now What" problem solving and planning**
		
		Circle back to Data Institute —
		  ● Remind where BLT (Building Leadership Team) and DLT (District Leadership Team) agendas are on MTSS Infrastructure page
		  ● Review "common collections" in eduCLIMBER, answer questions (we've been getting more asks for help/review in the weeks after Data Institute)
			Invite Nic & Academic SCs to building/district meetings when reviewing data and action planning

Tool #3: Promoting Equity of Voice

Facilitating Through Questions, Decision-Making Rules, Consensus Ladders, & Post-its

Facilitator

Leads the team and ensures that the meeting is productive. Keeps the discussion on track, encourages everyone to participate, and responds to any conflicts that may arise.
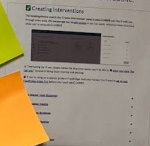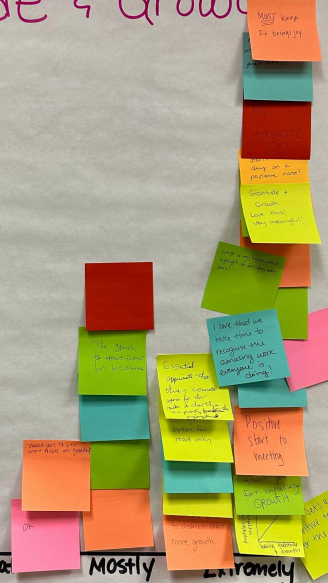
BURNING ?s
(what do you need today?)

time and being fully present seem like different norms

* chat monitor role? yes!

Should these rotate for equity?

Keep > emphasize

We the volume of VMS

* Make sure we plan enough time for activities
↳ We always feel rushed
maybe add more time

* Breaks are important

Suggestion: we want
1) Model how to provide feedback through NG role
2) Develop laminated card w/ norms + "formula"/step for feedback
3) Provide "norm check" in english so it's not like fidgeting or interrupting.

Decision Making Windows

Window 1	Window 2
The leader decides.	Input is gathered from others, then the leader decides.

Window 3	Window 4
Input is gathered, then the leader decides with a team.	The leader delegates. A team decides together and informs others.

Decision Making Windows

Consensus Ladder

AKA **"Fist to Five"** when a fist = 0, all 5 fingers up = 5

5	I agree wholeheartedly with the decision. I'll champion it.
4	I like this idea — sounds good.
3	I can live with the decision.
2	I have some concerns, but I'll go along and try it.
1	I have serious reservations with this idea that I'd prefer to resolve before supporting it.
0	No way, terrible choice, I will not go along with it. A way to block consensus.

Consensus Ladder

What Strategies Do You Use to Create Equity of Voice?

Tool #4: Wrap-up & Optimistic Closure

Wrap-up: Getting Down to Brass Tacks

Time	Topic (Person)	Notes	Action Items / Timelines
1:50 - 2:00	Wrap up	• Review action steps — *What did we decide to do?* ○ Service Coord - Nicole and Sarah will map our the progress tracking tool ○ Coaching - discussing at SSS check-in and come back with next steps. Transfer next steps to the agenda for Thursday Monthly Tactical. Add to school leaders meeting - list of mentors ○ Brightspace - Quiz vs survey on admin agenda ○ DBDM progress monitoring — Block off time next Thursday to work on tabs on Status Check form ○ DBDM district/building → Nic & academic team will prep activity for School Leaders Meeting, SSSs will prepare to action plan with their districts • Communication loops — *Who (people not present, other teams) needs to know?* ○ Alyssa will update Rob on portions she attended ○ Dufresne will need updates ○ New teacher emails - include Service Coordinator • Optimistic closure (e.g., "What are you looking forward to today?") *Take attendance in Brightspace*	

Optimistic Closure

Something I learned today...

I am curious about...

I am looking forward to tomorrow because...

Something I'll do as a result of this meeting is...

Something I still question...

Something that still concerns me...

Example Agendas

Agenda 1 (Spreadsheet)

WELCOME ROUTINE

ESSENTIAL QUESTIONS FOR THE TEAM (Pick 2 items)
1. What would you like to share with the team that is not important enough for the agenda, but is something you want known?
2. What's currently going well in your work?
3. What are you finding challenging right now?
4. How can the team support you (i.e., do you need direction, resources, time, etc.)?
5. Where in your work are you finding meaning or purpose?
6. Celebration/Shout-Out: Please share a recent celebration or success of yourself or one of your colleagues.

SET-UP FOR THE DAY

CALENDAR CHECK (Name --> Conflict --> Time)	ITEMS TO CATEGORIZE (Add your initials if you're adding an item)	MOVING ITEMS FORWARD
		If moved to the following week's agenda for the first time (yellow)
		If moved for the second time (red)
		If red and needing to be moved again, determine if it needs to be addressed or if it should be deleted

URGENT, IMPORTANT (Needs to be completed before end of meeting)

	Item	Discussion/Notes	Task/Next Steps	Assigned to
☐	Collaborative Planning Project Requests - Review			
☐	Disputes - Update tab with any new disputes			
☐	JOINT TASKS LIST CHECK-IN			
☐	Learner's on the Move Spreadsheet - Any updates?			
☐	Active Case Managers --> Any updates?			

ACTION ITEMS FROM LAST WEEK

SCHEDULE COORDINATION

COMMUNICATION & FOLLOW-UP

Agenda 2 (Document)

[Team Name] Meetings 20xx-xx

TABLE OF CONTENTS

✨ To update this table of contents, click once on the table below and a small 'refresh button' will appear in the upper left corner. Click that refresh button. The headings throughout the document will automatically update your table of contents without having to manually bookmark stuff. Magic! ✨

* PURPOSE *
* NORMS *
* RESOURCES *
[DATE]

* PURPOSE *
...

* NORMS *

NOTE: These are example norms. A quick norm setting activity is to ask team members to read them and put an 'X' next to their top 3. When everyone's done, choose the ~5 or so norms with the most Xs.

- Start and end on time
- Be fully present and engaged — mentally and physically
- Speak both honestly and respectfully — tell your truth while using a social filter
- Without feeling rushed, say just enough
- Stay on topic — avoid tangents and save spontaneous questions for the end or parking lot
- Stay positive, open, and solution focused — avoid problem admiration
- Listen actively — respect others voices and differing opinions
- Assume positive intent with space to unpack
- Follow through on agreements/commitments/individual to dos
- What's shared as a team, stays within the team

* RESOURCES *

Practices	Data	Other
• Academic resource hub (SCRED) • SEL/behavior resource hub (SCRED) • Instructional strategies (SCRED) • Whole child support (SCRED)	• eduCLIMBER how-tos: ○ Logging in	• Teamwork and action planning resources

[DATE]

Time	Topic	Notes	Action Items / Timelines
	Set up	• Welcoming routine (e.g., celebrations & gratitude, community building) • Assign roles	N/A

Evaluate & Adjust

ST. CROIX RIVER EDUCATION DISTRICT
Meeting Facilitation Observation Rubric

OBSERVATION DETAILS		
Employee Name:	Date:	Location:

OBSERVATION RUBRIC

Note: Some indicators (or items within an indicator) may be deemed not applicable or appropriate for the specific activity being observed. These indicators/items will not be factored into the teacher's rating.

Setting the Stage for the Meeting

Indicator	4 - Exemplary	3 - Proficient	2 - Developing	1 - Below Standard	Rating
Preparation	Facilitator creates a comprehensive agenda that includes all relevant materials and data. Participants are invited to add items (if appropriate) or to reach out with questions. Facilitator's preparation greatly contributes to the positive outcome of the meeting.	Facilitator creates a comprehensive agenda that outlines the topics for the meeting with supporting materials and data. Facilitator's preparation positively contributes to the outcome of the meeting.	Facilitator creates an agenda that outlines the topics for the meeting, but does not provide any supporting materials or data. Facilitator's partial preparation contributes both positively and negatively to the outcome of the meeting.	There is no agenda for the meeting or the prepared agenda is not shared with team members. Facilitator's lack of preparation contributes negatively to the outcome of the meeting.	
Supportive & Inclusive Environment	Facilitator creates a meeting environment that is supportive, warm, and welcoming. Environment is consistently inclusive and respectful of all participants' cultural, social, and/or developmental differences. Facilitator demonstrates a commitment to involving all participants in the meeting, including those with a difference of opinion.	Facilitator creates a warm and welcoming meeting environment for all participants. Environment is inclusive and respectful of all participants' cultural, social, and/or developmental differences. Facilitator seeks to involve most participants in the meeting by asking open-ended questions, creating space for differences of opinion.	Facilitator creates a meeting environment that is somewhat cold and welcomes most participants. Environment is inconsistently inclusive and respectful of all participants' cultural, social, and/or developmental differences. Facilitator asks open-ended questions that involve some participants in the meeting and does not create space for differences of opinion.	Facilitator creates an environment that is cold and uninviting and/or environment is exclusive and disrespectful of participants' cultural, social, and/or developmental differences. Facilitator asks participants mostly closed-ended questions and fails to address differences of opinion in a productive manner.	
Rapport	Facilitator intentionally connects with the group	Facilitator seeks to identify common goals and interests	Facilitator self-identifies and communicates common goals	Facilitator does not engage in any rapport-building strategies.	

Feedback from Team Members

- Assess three times per year

- Review results and identify themes

- Share back out with the team

- Set intentions for continuous improvement

I-Team Norms Fidelity Check FY23

How did we do as a group upholding our norms? Please add comments to highlight factors that especially contributed to us upholding our norms or not upholding our norms. Be specific with suggestions when you are able!

nwoodward@scred.k12.mn.us Switch account

Not shared
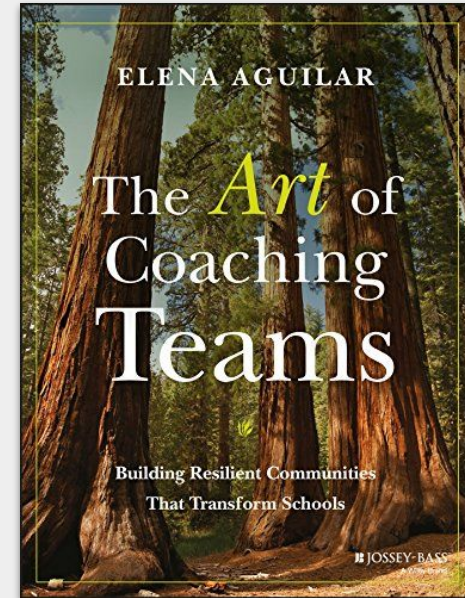
* Indicates required question

Date *

Date

mm/dd/yyyy

Grace. Grit. Growth.
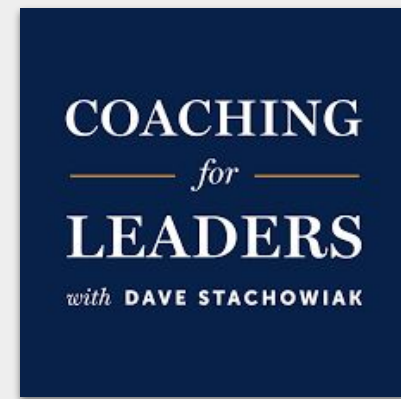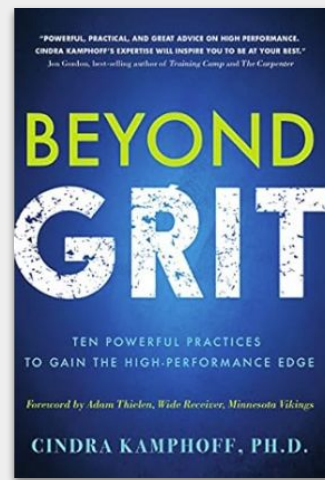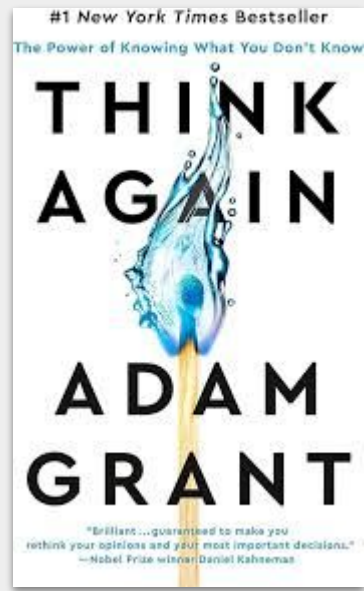
Fave Leadership Podcast Episodes Playlist
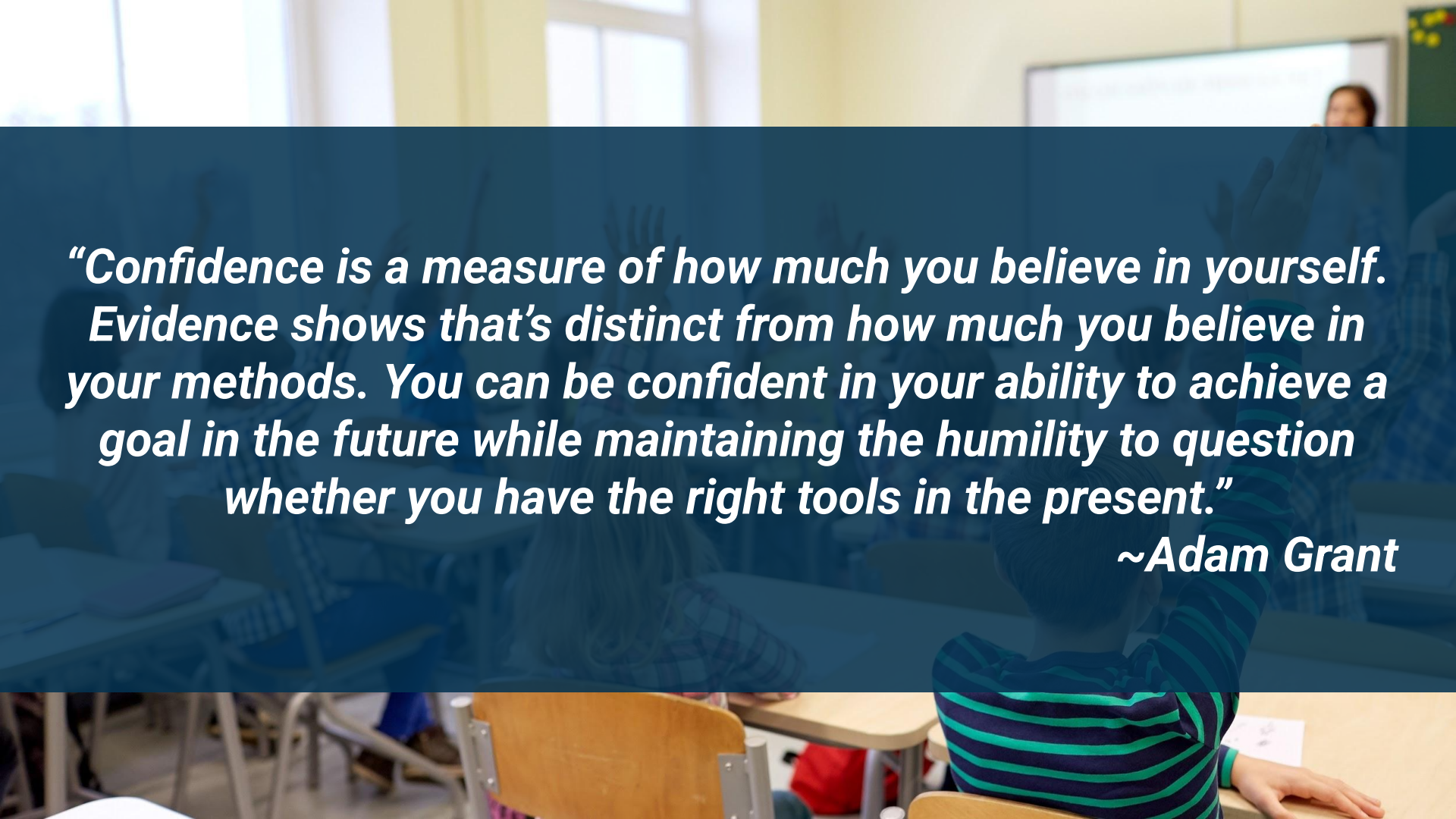
Questions

What are some actions you want to take toward enhancing the meetings you facilitate?

"Confidence is a measure of how much you believe in yourself. Evidence shows that's distinct from how much you believe in your methods. You can be confident in your ability to achieve a goal in the future while maintaining the humility to question whether you have the right tools in the present."

~Adam Grant

STAY CONNECTED
with your SCREDsters