

EFFECTIVE TEAMING AND MEETING MECHANICS RESOURCE MANUAL

TOOLS TO IMPROVE MEETING PROCESSES

START



Effective Teaming and Meeting Mechanics Resource Manual

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The START Project at Grand Valley State University is funded by the Michigan Department of Education, Office of Special Education to provide evidence-based training, coaching support, and resources to school-based teams in Michigan that support students with Autism Spectrum Disorder (ASD). START is a statewide collaborative effort to make systems level changes to improve the educational programming and quality of life for students with ASD.

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Effective Teaming & Meeting Mechanics Resource Manual

Meetings are an important part of sharing information and making decisions that help us capitalize on the strengths and experiences of a group of people with common goals. The most efficient and effective meetings adhere to a defined process and agreed upon guidelines that the group follows to execute the goals of the meeting.

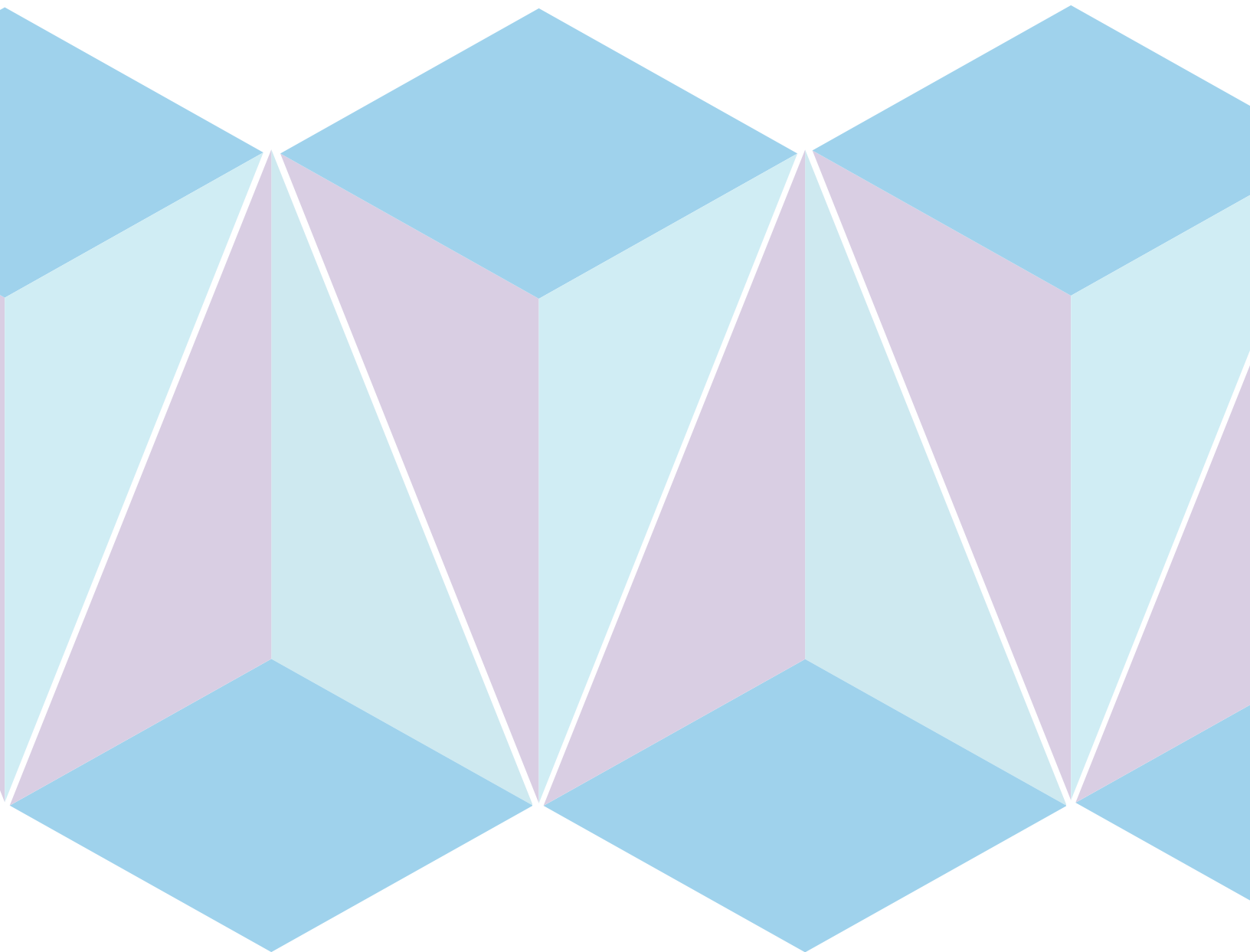
Experience tells us that certain key ingredients are important for meetings to achieve their purpose, for example getting the right people to the table, staying on task, making decisions based on accurate information, problem solving, and executing plans in a fair and timely manner. Each of these steps, among others, are defined in this manual to assist teams to accomplish their meeting goals and work more effectively.

The processes and tools in the manual are both universal for all meetings and customized for specific types of meetings so that the manual will function as a resource for various meetings.



Effective Teaming Process

The Effective Team Process section describes how to use Meeting Essentials (components for effective teaming), Meeting Practices (team behaviors), and Individual Accountability Practices (individual team member behaviors) for more effective team meetings. The Effective Team Process Checklist is a tool that teams can use to evaluate their processes in these three areas and set goals for improvement.



Effective Team Process Checklist

Team: _____ Date: _____

Meeting Essentials

Components Needed for Effective Teaming

1. Identified roles for facilitator, notetaker, and timekeeper
2. Guiding principles
3. An agenda
4. A medium for taking notes and recording action items
5. Visual organizer and a medium for use - whiteboard or chart paper
6. Meeting mechanics
7. Relevant data

Meeting Practices

Team Behaviors that Improve Meeting Effectiveness

8. Start and end meetings on time.
9. Ensure needed team members are present.
10. Follow established agenda.
11. Establish and rotate roles and responsibilities.
12. Use guiding principles.
13. Take notes and record action items.
14. Use meeting mechanics for problem solving.
15. Establish a decision-making process.
16. Ensure equitable distribution of action items.
17. Data are collected to guide decision making.

Individual Meeting Accountability

Individual Behaviors that Improve Meeting Performance

18. Make attendance at meetings a priority.
19. Arrive on time and stay for entire meeting.
20. Bring new ideas, relevant information and data, and evidence of action item completion.
21. Actively participate and contribute.
22. Seek understanding and presume positive intent.
23. Model and maintain a safe, productive climate for discussions.
24. Be mindful of your own verbal and non-verbal communication.
25. Address guiding principle violations.
26. Use law, research, and data to guide decisions.

GOALS:	ACTION PLAN:

Meeting

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Essentials

Components Needed for Effective Teaming

- **IDENTIFIED ROLES FOR**
Notetaker, Facilitator, Timekeeper
- **Guiding Principles**
- **AN AGENDA**
- **A MEDIUM for TAKING NOTES and RECORDING** Action Items
- **Visual Organizer**
and Medium for Use - Whiteboard or Chart Paper
- **Meeting Mechanics**
- **Relevant Data**

Meeting Practices

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Team Behaviors that Improve Meeting Effectiveness

- **START** and **END** meetings **ON TIME**
- Ensure needed **TEAM MEMBERS** are present
- Follow established **AGENDA**
- Establish and rotate **ROLES** and **RESPONSIBILITIES**
- Use **GUIDING PRINCIPLES**
- Take **NOTES** and record **ACTION ITEMS**
- Use **MEETING MECHANICS** for problem solving
- Establish a **DECISION-MAKING** process
- Ensure **EQUITABLE DISTRIBUTION** of action items
- **DATA** are collected to **GUIDE** decision making

Accountability

Individual Behaviors that Improve Meeting Outcomes

-  Make attendance at meetings a priority
-  Arrive on time and stay for the entire meeting
-  Bring new ideas, relevant information and data, and evidence of action item completion
-  Actively participate and contribute
-  Seek understanding & presume positive intent
-  Model and maintain a safe, productive climate for discussions
-  Be mindful of your own verbal and non-verbal communication
-  Address guiding principle violations
-  Use law, research, and data to guide discussions & decisions

Meeting Mechanics Problem Solving Process

When a team is presented with a problem, it is crucial for the team to efficiently identify variables and develop solutions that result in an action plan. This becomes more complicated when problems are complex or emotionally charged, and the process slows or is halted.

Adding structure to the process through the use of the Meeting Mechanics Problem Solving Process can assist with efficiently developing solutions in these situations. It is especially important to have all relevant team members involved to increase the odds of implementation.

Meeting Mechanics has some crucial elements:

- It involves having a facilitator “run the board,” which means using a whiteboard or chart paper to document the problem solving process.
- Guiding principles are posted (see the magnets in the manual) for all to see, so that the “rules” of the process are clear.
- Visual organizers create the problem solving and planning structure for different types of meetings. Specifically, the visual organizers guide the facilitator in how to set up the board.
- The facilitator follows the six steps of the Meeting Mechanics process: Problem Identification, Problem Specification, Brainstorming, Cluster and Prioritize, Implementation Variables, and Action Plan Development.

Starting with Problem Identification, the facilitator translates the discussion to the visual organizer on the board. One of the guiding principles is to “talk to the board,” especially during times of emotional escalation or when too much discussion is hindering the process. The team then moves through the steps in a timely way to gain a deeper understanding of the problem, identify potential solutions, define resources and barriers, and develop an action plan.

Meeting Mechanics follows a linear progression and each step should be completed thoroughly yet efficiently before the next step is started. Ultimately, Meeting Mechanics leads to better informed and more creative solutions, and a well-defined plan developed through a collaborative process.



Problem Identification

1

Use an
open-ended
format

2

Encourage
equitable
participation

3

Identify and
prioritize
problems

Problem Specification

1

Clearly define
prioritized
problems

2

Review data and
identify variables
associated with the
problems

3

Determine if
there is enough
information to
proceed

Brainstorming

1

Generate ideas to solve the problems

2

All ideas go to the board

3

Use the guiding principles

Cluster & Prioritize

1

Clarify
ideas

2

Cluster
similar ideas

3

Prioritize for
implementation

Implementation Variables

1

Determine
resources
needed

2

Address
possible
barriers

3

Identify data
needed for
evaluating
progress

Action Plan Development

1

Develop
action items

2

Ensure equitable
distribution of
assignments

3

Establish
deadlines and
review dates

Effective Teaming and Meeting Mechanics Resources

Two key resources to enhance the Meeting Mechanics Process are Guiding Principles and Visual Organizers. During meetings, Guiding Principles are posted and visible to all team members, and visual organizers are used to structure the meeting discussion.



Guiding Principles

START

All

IDEAS

are

GOOD

IDEAS

Talk

to the

Board

Refrain from
**Defending, Convincing,
or Monopolizing**

Guiding Principles

START

Control the **CONTROLLABLES**

Step out
of your
Defined
Role

STICK
with the
PLAN

Visual Organizers

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability.

Visual Organizers are designed as templates to enhance communication and problem solving, to support the sharing of ideas and solutions, and to avoid the potential challenges and barriers that can occur during unstructured team meetings. The Visual Organizers are most effective when used with a medium, such as a whiteboard or chart paper.





Meeting Agenda Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Meeting Agenda Visual Organizer and the Meeting Agenda Tool are intended to guide teams through a systematic and consistent meeting process that leads to efficient team meetings.

Meeting Purpose:			
Date:		Facilitator:	
Time:		Notetaker:	
Format:		Action plan:	
		Time keeper:	
Calendar:			
Review Action Plan			
Discussion:			
Next steps:			
Action Plan			
Who	What	By When	Status



Meeting Mechanics Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Meeting Mechanics Visual Organizer and the Meeting Mechanics Tool are intended to assist school teams in utilizing a systematic problem solving approach.

Data		Idea Generation		Implementation	
Problem Identification	Problem Specification	Brainstorming	Cluster Prioritize	Implementation Variables	Action Plan Development



Paraprofessional Planning Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Paraprofessional Planning Visual Organizer and the Paraprofessional Planning Tool are designed to assist school teams in determining when 1:1 adult support is appropriate and necessary in designing a plan that includes processes for fading the paraprofessional over time.

STEP 1: Complete a schedule matrix to determine where the student may need additional support.

Student Schedule	Expectations & Instructional Demands	Current Level of Skills (Compared to Peers)	Current Supports, Strategies, and EBPs	Potential Goals & Strategies Needed

STEP 2: If it is determined that the student needs one-to-one adult, use the following Whiteboard Organizer to identify when, where, & goals.

Student Schedule	Expectations & Instructional Demands	What are the Goals and Outcomes for the Student	Adult Role(s), Responsibilities, & Strategies	Data Collection and Plan to Reduce the Need for a One-to-One Adult Support



ABC Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This ABC Visual Organizer and the ABC Visual Tool are intended to be used by IEP or behavioral planning teams to assist in developing strategies to address challenging behavior.

Antecedent Variables	Behavior	Consequence Variables	Brainstorming



Schedule Matrix Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Schedule Matrix Visual Organizer and the Schedule Matrix Tool are intended to be used by IEP and behavioral planning teams to assist in goal development and identification of necessary supports and strategies.

Student Schedule	Expectations & Instructional Outcomes	Current Level of Skills (Compared to Peers)	Current Supports, Strategies & EBPs	Potential Goals & Strategies Needed



Behavioral Response Script Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Behavioral Response Script Visual Organizer and the Behavioral Response Script Development Tool are designed to assist school teams in developing scripts to empower adults to consistently respond to student behavior in ways that reduce escalation and teach self-regulation.

Level of Escalation	What STUDENT Says and Does	What STAFF Says and Does in Response to Student Behavior
Level 1 Engagement		
Level 2 Anxiety		
Level 3 Agitation		
Level 4 Anger		
Level 5 Aggression		
Level 6 Recovery		



Differentiated Output Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Differentiated Output Visual Organizer and the Differentiated Output Tool are designed to assist school teams in developing a working plan for determining how the student's academic work will be differentiated.

Class	Skills required to engage in curriculum	Student demonstrated skills and strengths	Differentiated Output Hierarchy level to bridge the gap for increased independence	Technology Needed



Passport and Peer to Peer Support Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Passport and Peer to Peer Support Visual Organizer and the Passport and Peers Tool are designed to assist P2P teams in developing learning priorities for students during peer to peer case conference meetings. Priorities developed can be discussed when the team develops IEP goals and objectives.

How can we help _____ this year to: _____.		
Be more independent	Participate more fully in general education and school experiences	Increase life skills



Individualized Educational Program (IEP) Process Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This IEP Process Visual Organizer and the IEP Process Tool are designed to assist school teams in developing authentic IEPs and includes the primary components of the IEP for non-transition age students.

Parent Input	PLAAFP Area of Need Data Impact	Supplementary Aids/ Services	Goals & Objectives/ Benchmarks	Special Education Program and Related Services



ASD Evaluation Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This ASD Evaluation Visual Organizer and the ASD Evaluation Tool are designed to assist school teams in gathering information during a special education evaluation for ASD and making a final determination of eligibility.

<p><u>Reciprocal Social Interaction</u></p>	<p><u>Restrictive, Repetitive Behavior</u></p>
<p><u>Communication</u></p>	<p><u>Sensory (may include)</u></p>



Collaborative Transition Visual Organizer

Visual Organizers structure and support the Effective Teaming and Meeting Mechanics processes, which includes the use of Meeting Practices, Meeting Essentials, and Individual Meeting Accountability. This Collaborative Transition Visual Organizer and the Collaborative Transition Tool are intended to be used by transition planning teams to assist in developing a collaborative transition plan that includes supports by schools and adult service agencies.

Student Schedule	School Support	MRS Support	CMH Support	CLS Support



Action Plan

Meeting: _____

Date: _____

Who	What	by When	Status