Step 1:

Preparing for the First Team Meeting

What is Preparing for the First Team Meeting?

Preparing for the first team meeting requires careful planning. It involves getting to know the organization for which you will be coaching through research. Setting a time to meet with key personnel prior to the first meeting is critical. At this meeting you will discuss the goals of the organization; determine the expectations and outcomes for the work of the team; set the agenda and calendar; and establish the role of the coach.

Why is Preparing for the First Team Meeting important?

Careful planning will increase meeting productivity, build a positive relationship with the team, and establish effective processes that create a clear focus for all meetings.

How does a coach help the team develop the skills and competencies to function independently?

As teams take over the ownership for planning meetings, the tools and process modeled by the coach will help them build capacity. The job aids included in this section can be used to co-plan with the team. The planning responsibility is gradually released to the team and supported by the coach through feedback.

Job Aids

Coach's Tool for Self Monitoring

- This document will to help a coach plan for the first team meeting self reflective questions.

Planning Tools At a Glance

- This checklist will help a coach organize the necessary steps in coaching a team.

Sample Meeting Agenda Form

- This agenda template helps focus the work of the team with outcomes, as well as roles and norms.

References and Resources

Sample Meeting Protocol

- This on-line template can be downloaded and used as a tool for planning for a meeting. It provides ideas about the roles and responsibilities of team members.

www.newdirectionsconsulting.com/wp-content/uploads/samples/MeetingProtocolTemplate.doc

Directions: This job aid can be used as a part of a training activity or as a guide for a coach to begin planning for the initial organization contact. The self-assessment questions can guide a coach's progress.

Making the Initial District/School/LEA Contact	Coach's Self- Assessment Questions
☐ Use data to identify current status of the organization and the team?	• *Have I reviewed available data to become familiar with the organization to be served?* • *Have I determined whether a team is in place and what purpose has been established for the team?*
☐ Identify the person who is the initial point of contact for the team	• *Have I followed protocol by contacting the organization's leader or designee first to identify my role as a coach and determine who is to be the point of contact for team level work?* • *Do I have contact information for the team leader?*
☐ Contact the district/school/LEA team leader	• *Have I set the first face-to-face meeting with the team leader identified by the organizational leader or designee?*
☐ Collaborate with team leader to set dates for meetings and progress checks	• *Have I reviewed my calendar prior to the meeting with the team leader to determine consistent times I am available for coaching?* • *Do I know when/whether a team has sufficient times allocated for meetings?* • *What other options are available to the coach and team other than face-to-face meetings? (Example, Skype, Go-To-Meetings)*
☐ Identify any areas of training needed for team members relative to the improvement process	• *Do I know whether the team is newly formed, has new members or has returning members?* • *Do I know who the current team members are and their roles on the team?* • *Do I know the level of experience of team members in improvement planning?*
Coach's Pre-Meeting Processes	**Coach's Self- Assessment Questions**
☐ Review coaching manual for resources related to team meeting processes ☐	• *Have I reviewed meeting protocol?* • *Do I have a copy of any job aids needed for the first meeting?*
☐ Collaborate with team leader to create initial agenda and plan the meeting with a focus on team improvement targets	• *Do I have a sense of where the team has been and where they are going?* • *Have I reviewed the previous year's improvement targets?* • *Have I discussed with team leader who will facilitate the first meeting?* • *Have I explained to the team leader the focus of my work will be building team capacity?*
☐ Decide who will create and copy materials for the initial meeting	• *Have I determined who is responsible for copying materials needed for the meeting?* • *Have I reviewed the agenda to make sure all necessary resources will available?*
☐ Review any needed content information, data or team structures	• *Do I know the purpose of the team and the content related to its purpose?* • *Do I understand the processes connected to team practices and procedures? (Example, required documents, logs or technology)*
☐ Send reminders of the meeting	• *Have I determined the best way to contact team members?* • *Do I have contact information for all members of the team?*

Meeting Agenda			
Date: Time:			
Facilitator:	Recorder:	Timekeeper:	
Team Members Present:			
What	**Who**	**Notes/Accomplishments/Actions Taken:**	**Time**
Start-Up: • Group Norms • Roles			
Outcomes: • •			
Unfinished Business: •			
Agenda Items: •			
Next Steps: •			
Meeting Review +△			
Next Meeting Date:		Facilitator: Recorder: Timekeeper:	

AT-A-GLANCE TIMELINE FOR COACHING

Directions: *This tool gives the coach a yearly overview of the coaching process. It can be used for pre-planning and can also be incorporated into planning with a team. Items can be added or deleted as needed.*

August/September

- ☐ Complete Organizational Profile
- ☐ Data to Collect ________________________
- ☐ Initiate Contact
- ☐ Review Team Goals and Purpose
- ☐ Plan First Team Meeting
- ☐ Meeting Dates _________________________
- ☐ Monitoring Dates_______________________
- ☐ Other__________________________________

October/November

- ☐ Meeting Dates ________________________
- ☐ Professional Development ______________
- ☐ Data to Collect ________________________
- ☐ Monitoring Dates______________________
- ☐ Other_________________________________

December/January

- ☐ Meeting Dates ________________________
- ☐ Professional Development _______________
- ☐ Data to Collect _________________________
- ☐ Monitoring Dates_______________________
- ☐ Other__________________________________

February/March

- ☐ Meeting Dates ________________________
- ☐ Professional Development ______________
- ☐ Data to Collect ________________________
- ☐ Monitoring Dates______________________
- ☐ Other_________________________________

April/May

- ☐ Meeting Dates ________________________
- ☐ Professional Development ______________
- ☐ Data to Collect ________________________
- ☐ Monitoring Dates______________________
- ☐ Other________________________________

June/July

- ☐ Meeting Dates __________________________
- ☐ Professional Development ________________
- ☐ Data to Collect __________________________
- ☐ Monitoring Dates________________________
- ☐ Other___________________________________