Nuts and Bolts for Transdisciplinary Teams

A Collection of Key Questions and Suggested Team Development Activities

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Introduction

In order for transdisciplinary teams to function in ways that are both productive and satisfying for the members, a number of essential elements need to be present. These might be thought of as the “nuts and bolts” of transdisciplinary teaming. Among them are:

- The transdisciplinary process and practices,
- An engaging mission and realistic goals,
- Competent, committed team members with clear roles and responsibilities,
- A well-thought out process for delivering services to children and their families,
- Excellent communication, interpersonal skills, good working relationships, and established and effective communication processes,
- Effective team meetings,
- Mechanisms for ongoing team assessment and continual quality improvement.

Different teams will need to focus on different “nuts and bolts” at different times to enhance their capacity to do their work. One team might be just forming and may need to focus on clarifying their mission and goals. Another team may have been together for a while, but needs to focus on redefining team roles or rethinking communication processes. Still another team is well-established, settled in its work processes and relationships, but is responding to new challenges and decides to assess the team’s functioning, reconsider its work processes, and develop new relationships outside of the team.

This document describes key questions that need to be considered and suggested activities that we have found useful in developing the “nuts and bolts” required for effective transdisciplinary team work. While every team will probably need to consider each element at various times during its development, teams should avoid becoming overwhelmed by trying to do everything at once. In order for the team to move forward, it is important to figure out which element to focus on for the moment.

The materials in this collection are just a starting place. Feel free to customize them for your team; we would appreciate the reference to our original work.

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# Landmarks of the Transdisciplinary Process

This section of *Nuts and Bolts* outlines major steps in the service delivery process once the initial IFSP has been completed. Each step is described by key questions that illustrate the reasoning that the transdisciplinary team and primary service use as they move from one step of the process to the next.

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What happens during this step?
The team receives the name and contact information for a child and family who may benefit from the team’s services.

Key Questions:
- Who on the team receives referrals? Is this person clear to referral agencies?
- Does the referral source understand the purpose, philosophy, and services of the team?
- Is the family currently involved with Part C? If so, who is the service coordinator? If not, who should they contact?
- Has the child’s IFSP been completed? What is the process for getting the IFSP to the relevant transdisciplinary team members?
- Does the team have sufficient information to know how to proceed with contacting the family?
- Does the team clearly understand the services described by the IFSP?
  - Are outcomes clearly written in functional, meaningful language (in context of participation in everyday routines, activities, relationships, and places)?
  - Is frequency, duration, and intensity of the services requested clear to the team?
Identifying the Primary Service Provider

What happens during this step?
The team assigns a primary service provider to work with the family based on information gathered from the family, IFSP, and service coordinator.

Key Questions:
- What process will be used to assign a primary service provider to each child and family served?
- To what extent will the team consider…
  a. The family’s requests?
  b. The family’s spoken language?
  c. Other unique characteristics of the child and family?
  d. The family’s outcome(s) on the IFSP?
  e. The child’s primary delay or disability?
  f. The team members’ expertise and experience?
  g. Geography?
  h. Availability of team members (case load, days, and times)?
Making First Contact with the Family

What happens during this step?
A member of the team makes initial contact with the family.

Key Questions:
- In what ways will the team develop a positive, trusting relationship with the family?
- Which team member will make the initial contact?
- What are the family’s priorities, concerns, and resources?
- What are the family’s expectations of the team?
- Does the family have a request for a primary service provider?
- Does the family understand the purpose, philosophy, and services of the transdisciplinary team?
- How will the team member describe:
  a. the transdisciplinary approach and the use of a primary service provider?
  b. the ways that team members share information, e.g. team meetings, consultation, consultation visits, the use of video?
  c. the roles that family members choose to play as advocates and decision makers on the team during assessment, intervention planning, visits, team meetings, etc?
  d. how intervention occurs within the context of everyday family life, including the involvement of all family members and other important people in the child’s and family’s life?
- Is there an outline of points, a printed document, and/or a “script” that team members can use to guide them in discussing the transdisciplinary approach, the roles of families, etc. with families and others?
- Do the team member and family have all of the information needed to keep in contact with one another?
- Do the parents agree to proceed in exploring the family’s involvement in the program?
- Do the PSP and family agree what will happen next (e.g. who will do what, when, where, and how)?
Planning Intervention:
Bridging Information from the IFSP to ERRAP

What happens during this step?
The primary service provider (PSP) visits with the family to build a positive, trusting relationship and begin to explore ways to address the IFSP outcome(s) and facilitate the child's participation in everyday routines, relationships, activities, and places (ERRAP).

Key Questions:
- Does the PSP have the information gathered so far in the process (e.g. IFSP, contact information, pertinent medical information, HIPPA forms, release of information, etc.)?
- Does the family understand the transdisciplinary approach and the use of a primary service provider (this may need to be revisited even though it may have been discussed in previous contacts)?
- What are the family members and the PSP’s expectations of one another, e.g. what to do if appointments need to be cancelled, how to contact one another, parents and other family member’s active participation during visits, etc.?
- Does the PSP understand the family’s expectations for the intervention process?
- Has anything significant changed for the child and family since the initial IFSP was completed?
- Do the PSP and family commit to the IFSP outcomes and intervention strategies?
- Do the PSP and family need to clarify additional information about the child and family’s everyday routines, relationships, and activities through additional assessment activities, observation, routines-based discussions, etc.?
- Does the family understand the purposes and process of using video during intervention (this may need to be revisited even though it may have been discussed in previous contacts)?
- Do the PSP and family agree what will happen next (e.g. who will do what, when, where, and how)?
What happens during this step?
Parents, PSP, and other team members collaborate to implement the intervention.

Key Questions:
- What activities and strategies can be used to address the IFSP outcome(s) and support the family to enhance the child’s skills, independence, and participation in the context of everyday routines, relationships, activities, and places?
- What adaptations might be useful that can be implemented right away?
- What consultation from other team members is needed?
- Who else do the family and PSP need to collaborate with for successful implementation of the intervention?
- Does the family perceive the intervention activities as useful, as making a difference? Does the family want to see the plan or activities changed in any way?
- Who will participate in the ongoing evaluation and revision of the intervention plan?
- How will ongoing assessment be a part of the intervention?
- How are new concerns and priorities of the family integrated into the plan?
- Do the PSP and family agree what will happen next (e.g. who will do what, when, where, and how)?
Supporting Transitions from the Team or from Part C

What happens during this step?
Parents, PSP, other team members, service coordinator, and others collaborate to support the child’s and family’s transitions.

Key Questions:
• Are transition processes occurring according to recommended practices and family entitlements?
• What assessment processes are indicated and/or required to assist in planning for the future?
• If the child is exiting Part C, how will the team collaborate to support the family in the transition planning process?
• Have all options been shared and considered with the family?
• Is the family adequately informed about the characteristics of future service delivery systems?
• What else needs to be done?
This section of *Nuts and Bolts* may be useful to newly formed teams, “older” teams that want to revisit their mission, goals, and purpose, and teams with new members. The section offers ideas for conversations and activities useful in clarifying team mission, goals, purposes, and commitment.

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“Teams are defined not by the people on them but by what the team must do. Teambuilding is simply a set of messages successfully shared among a group of people. Individuals who want to get their work done through interaction with others must learn to make their wants and desires known without ambiguity and without magical thinking.”
Christopher Avery, p. 14.

Avery suggests that team members should have the following five conversations once the team has been formed in order to clarify the work and their team processes. (pp.14-19)

**Conversation One: Focusing on the Collective Task**
- What was the team formed to do?
- What are the tasks and deliverables expected of the team?

**Conversation Two: Aligning Interests**
- Do all team members share the same level of motivation for the team to be successful?

**Conversation Three: Establishing Behavioral Groundrules**
- What are the team norms? In other words, what behaviors do the team members agree that they want to see in their collective efforts (and what behaviors do they not want to see)?
- How will the team “enforce” those agreements? How will the team provide behavioral feedback to teammates? How can the team make it safe to both give and receive feedback on broken agreements?

**Conversation Four: Setting Bold Goals and Anticipating Conflicts, Breakthroughs, and Synergy**
- How will the team desired accomplishments occur over time? (Realizing that a team’s performance may be flat at first and then improve rapidly.)

**Conversation Five: Honoring Individuals and Their Differences**
- What does each member bring to the task?
- In what ways will the team members honor differences in perspectives and approaches?

“...high performance teams have both a clear understanding of the goal to be achieved and a belief that the goal embodies a worthwhile or important result.” (Larson and LeFasto, 1989, p. 27)

“Most effective teams trace their advancement to key performance-oriented events. Such events can be set in motion by immediately establishing a few challenging goals that can be reached early on. There is no such thing as a real team without performance results, so the sooner such results occur, the sooner the team congeals.” (Katzenbach & Smith, 1993, p. 119)

“A clear understanding of what is to be accomplished is the cornerstone upon which all collaborative sessions rest.” (Kayser, 1994, p. 58)

The quotes above illustrate how important it is for teams to clarify their missions, goals, and the outcomes they wish to achieve. Following are three sample activities that teams might want to pursue.

1. **Develop (or reconfirm) your mission statement.** The statement might include:
   - values and beliefs about the team
   - a clear description of what the team is all about,
   - what the team is dedicated to doing,
   - the general reason for forming the team, and
   - how the team will accomplish its mission.

2. **Clarify Desired Outcomes**
   Outcome: A statement of the measurable conditions desired for the children and families you will serve.
   - Define the desired outcomes of the team and ways that you will measure the team’s progress toward achieving them.

3. **Quick Results**
   - Choose key goals and activities to achieve your outcomes that the team members feel can be addressed successfully with immediate tangible results.
This section of *Nuts and Bolts* offers some guidance around the important need for transdisciplinary teams to clarify team roles and responsibilities.

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Key Discussion Questions:
1. Do all team members share the same understanding of the term “transdisciplinary”?
2. What expertise and experience does each member bring to the team?
3. Do all team members accept the responsibilities of:
   - **Role release**: Accepting that others can do parts of what a specialist was trained to do.
   - **Role expansion**: Embracing that one's job can include more than what one was trained to do.
4. What does and does not feel comfortable about the transdisciplinary approach?
5. How will training needs be identified and provided for the team members?
6. How will the team make use of video as a strategy for team communication and consultation?
7. When and how will the team request and/or offer feedback and consultation to one another (including families)?
8. Which communication strategies will the team members use to offer and receive education, feedback, and consultation from one another?
   - Watching video together?
   - Consultation visits?
   - Team meetings?
   - Ad hoc meetings?
   - E-mail?
   - Print resources?
   - Notes?
   - Web resources?
   - Video resources?
   - Phone calls?
   - Reflective dialogue?
   - Vignettes: Description of situation, meaningful moments, and impact on the practitioner?
The Roles of Families on the Team

Teams need to have common “scripts” in their minds regarding how they help families understand the transdisciplinary early intervention process.

**Key Questions:**

1. In what ways will the team members describe the transdisciplinary approach to families?
2. In what ways will the team members talk with parents about parents’ roles as advocates and decision makers?
3. In what ways will the team members talk with parents about the roles that parents may choose to play on the team during:
   - assessment?
   - intervention planning?
   - active participation during visits?
   - team meetings?
4. In what ways will the team members talk with parents about how intervention occurs within the context of everyday family life, including the involvement of all family members and other important people in the child’s and family’s life?
Get to Know What Each Member Brings to the Team

Each team member brings a wealth of experiences, skills, and knowledge to the team. Dedicate adequate team time to learning what each member brings to the team. By reviewing and clarifying its members’ skills and abilities, teams encourage each member to focus their strengths toward the team goals and reduce role ambiguity. The activities below may assist teams in this endeavor.

Activities to Consider

Sharing Skills and Strengths
Team members should work individually listing specific skills that they have and that they would like the other team members to know. Each member should list their specific areas of strengths for working with children and families including any special areas of focus and interest AND should also include other activities that they perform well that can be an asset to the team’s functioning, such as project management, writing, negotiating, organizing, directing, budgeting, cooperating, thinking, teaching, etc. Once each member has had a chance to list their strengths, devote a meeting or portion of a meeting to sharing these with one another.

Lifeline of Experiences Exercise
This exercise helps team members let each other know the rich experiences they are bringing to the team. The exercise will take about two hours for a team of about ten people.

a. Choose a room that has a long smooth wall. Tape butcher block paper the length of the wall. Create a timeline by dividing the paper by 30 years or so, giving each year a foot or two, e.g. 1965, 1966, 1967, etc. all the way up to the current year. You may need to wrap the paper around a corner of the room to have enough space for all of the years.

b. Give each team member a different colored marker. Ask each member to note key events in their life that have influenced who they are and what skills, knowledge, wisdom, and perspective they are bringing to the team by writing a key word or pictures by the year the event occurred on the timeline. These might be personal or professional events. Have all of the team members work at the same time, but silently. Allow 10 to 15 minutes for this.

c. After everyone has finished writing on the timeline, each group member, one-at-a-time, goes to the timeline and chronologically talks through their personal experiences with the group. Allow 5 to 10 minutes for each person.

d. After everyone has told their story, have the team members offer summarizing remarks about what they learned from the exercise, about themselves, others, and the team.

e. After the summary, take a break for some general socializing.

Note: This exercise has the potential to evoke very powerful emotions as individual members may choose to tell very personal and sometimes difficult memories. Be sure that there is sufficient trust in the team and a promise of confidentiality before using this exercise.

Introducing a Partner
This simple and well-known icebreaker activity might work well with newly formed teams when the team members do not know each other. Ask each team member to find one partner, forming pairs. Ask the pairs to introduce themselves, sharing their professional skills, strengths, and interests as well as personal information that they are comfortable sharing. Remind them that they will be asked later on to introduce their partner to the group, so to pay extra close attention. Once the introductions are made, have each team member introduce her or his partner.
There are a number of functions required for teams to operate successfully. Note that these are *functions*, not roles. For instance, the various coordination functions might be distributed among several people. *Who on your team will take responsibility for the various functions?*

<table>
<thead>
<tr>
<th>Team Membership</th>
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<tbody>
<tr>
<td>• Take responsibility for the quality and productivity of the team's service</td>
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<tr>
<td>• Take responsibility for team functioning and relationships</td>
</tr>
<tr>
<td>• Bring full capacity to the team</td>
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<tr>
<td>• Build and maintain satisfying relationships</td>
</tr>
<tr>
<td>• Accomplish tasks</td>
</tr>
<tr>
<td>• Share knowledge and resources with the team</td>
</tr>
<tr>
<td>• Practice role expansion and role release</td>
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<tr>
<td>• Recognize that conflict is an inevitable part of the team process and be committed to addressing conflict directly and respectfully</td>
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<thead>
<tr>
<th>Coordination</th>
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<tbody>
<tr>
<td>• Facilitate team functions outside of meetings</td>
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<tr>
<td>• Schedule, organize, and facilitate team meetings</td>
</tr>
<tr>
<td>• Facilitate ongoing team communication</td>
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<tr>
<td>• Facilitate the sharing of resources and knowledge</td>
</tr>
<tr>
<td>• Communicate to referral sources and funders</td>
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<tr>
<td>• Receive new referrals</td>
</tr>
<tr>
<td>• Assign primary service providers</td>
</tr>
<tr>
<td>• Start new charts and share child and family information with team members</td>
</tr>
<tr>
<td>• Monitor productivity/case loads</td>
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<tr>
<td>• Store, reserve, and track equipment</td>
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<tr>
<td>• Order supplies</td>
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<thead>
<tr>
<th>Supervision</th>
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<tr>
<td>• Facilitate reflective supervision</td>
</tr>
<tr>
<td>• Determine training needs</td>
</tr>
<tr>
<td>• Evaluate performance</td>
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This section of *Nuts and Bolts* offers guidance around the important need for transdisciplinary teams to clarify team roles and responsibilities. Communication skills can always be improved. Individual team members and teams as a whole can commit to continually working to improve communication skills. Communication skills to consider working on include:

- recognizing how emotions influence communication;
- understanding one’s own biases and assumptions;
- active listening skills;
- giving constructive feedback to others, and accepting feedback from them;
- team discussion and dialogue skills.

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“In an effective group, members pay attention to both:

1) how the task gets done, and
2) what is happening to relationships in the group.

A group’s “task” is the work it is trying to get done, the objective it is trying to achieve. “Relationship” refers to the group’s trust, openness, and cohesiveness. Research shows clearly that groups that don’t pay attention to both dimensions don’t work as well as groups that do.”

(Dave Miller in Jones, 1993, p. 10-12)

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<thead>
<tr>
<th>Task-Accomplishing Behaviors</th>
<th>Relationship-Building Behaviors</th>
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<tbody>
<tr>
<td><strong>Initiating</strong></td>
<td><strong>Listening</strong></td>
</tr>
<tr>
<td>Establishing goals, objectives, or tasks</td>
<td>Attending to others</td>
</tr>
<tr>
<td>Suggesting processes and procedures</td>
<td>Not interrupting</td>
</tr>
<tr>
<td><strong>Seeking Information</strong></td>
<td><strong>Not interrupting</strong></td>
</tr>
<tr>
<td>Asking for facts</td>
<td>Responding to what’s been said</td>
</tr>
<tr>
<td><strong>Giving Information</strong></td>
<td><strong>Encouraging</strong></td>
</tr>
<tr>
<td>Offering facts, ideas, opinions, beliefs</td>
<td>Acting friendly, open, and accepting</td>
</tr>
<tr>
<td><strong>Clarifying</strong></td>
<td>Soliciting participation</td>
</tr>
<tr>
<td>Probing for meaning</td>
<td>Praising and supporting others</td>
</tr>
<tr>
<td>Explaining ideas</td>
<td><strong>Gatekeeping</strong></td>
</tr>
<tr>
<td><strong>Building</strong></td>
<td>Facilitating everyone’s participation</td>
</tr>
<tr>
<td>Elaborating on other’s ideas</td>
<td>Observing where the group is in its process</td>
</tr>
<tr>
<td><strong>Paraphrasing and summarizing</strong></td>
<td>Testing group satisfaction with the process</td>
</tr>
<tr>
<td>Restating what someone has said</td>
<td><strong>Harmonizing</strong></td>
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<tr>
<td>Reviewing ideas that have been offered</td>
<td>Willingness to differ</td>
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<tr>
<td>Pulling varied ideas together as a whole</td>
<td>Recognizing instead of avoiding issues/ conflicts</td>
</tr>
<tr>
<td><strong>Problem Solving</strong></td>
<td><strong>Working through conflicts</strong></td>
</tr>
<tr>
<td>Offering alternatives</td>
<td>Relieving tension; laughing</td>
</tr>
<tr>
<td>Considering advantages/disadvantages</td>
<td>Yielding when necessary to achieve the group’s objective</td>
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<tr>
<td>Making proposals</td>
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<tr>
<td>Testing for group agreement</td>
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<tr>
<td>Deciding how to decide</td>
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<tr>
<td>Identifying who will do what by when</td>
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<tr>
<td>Summarizing the decision</td>
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<tr>
<td><strong>Managing</strong></td>
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<tr>
<td>Sharing leadership appropriately</td>
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<tr>
<td>Using group time well</td>
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<tr>
<td>Regularly evaluating its performance</td>
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The purpose of active listening is to help you clearly understand exactly what the speaker is trying to communicate, and to let the speaker know that you have understood. In active listening, we listen for both the content and the feeling conveyed in the message. Active listening includes the elements described below.

**Elements of Active Listening**

1. **Be Attentive**
   - Pay close attention to what is being said; demonstrate that you are listening through attentive body language.

2. **Suspend Judgment**
   - This is perhaps the most difficult of these elements -- it means not agreeing or disagreeing. Remember, the purpose of active listening is to understand the other person.

3. **Reflect Back**
   - Use the same or similar words to reflect the speaker’s idea back to him or her. For example -- Speaker: “I’m really unhappy about the meeting we had today.” Listener: “It sounds like you have some concerns about how it went.” This technique helps both to convey your interest and to elicit more information.

4. **Listen for Feelings**
   - If something is important to the speaker, he or she will have feelings about it. Often, the feelings themselves are the most important part of the message. Acknowledge the feelings the other person is conveying to you. For example -- “From the way you describe the situation, it sounds like you’re very frustrated.”

5. **Summarize**
   - Pick out what you think were the most important parts of the speaker’s message. Summarize them back to the speaker, to be sure you understand and to convey your understanding to the speaker.

**Activity to Consider**

- Have the team review and discuss the elements of active listening.
- Divide the team into groups of three. Have each triad assign the roles of speaker, listener, and observer to the members.
- The exercise is for the speaker to tell a personal story to the listener. The listener is to listen using the elements of active listening. The observer is to watch the interaction to give the pair feedback later.
- After the speaker is through, the speaker and the listener should debrief the experience, discussing such questions as: How did the speaker feel? How did the listener feel? What did the listener do that the speaker liked? Once they have discussed it, the observer should offer his or her constructive observations and comments.
- Switch roles and complete the exercise until everyone has had the opportunity to play all three roles.
- Get the whole team together and have a conversation about how the team will benefit from listening attentively to one another.
As teams develop their skills, it is helpful for team members to agree how they can support each other by offering feedback. Doing this can prevent situations in which feelings are hurt or situations in which the work doesn’t move forward because team members are reluctant to give feedback to others. This activity is intended for teams to establish permission and ground rules for giving each other feedback on their practices. A version of this activity appears in Getting on Board.

**Activity to Consider**

**Time Required:** One - two hours.

**Basic Steps:**
1. Introduce the activity by suggesting that to improve our practice, we can benefit from constructive feedback from our peers. The purpose of this activity is to look at what makes feedback helpful, and then to agree, as a team, how we will give each other feedback on our practice.

2. Have the team members determine the characteristics of helpful feedback, by posing the following questions for discussion:
   - What makes feedback useful? (e.g. opportunities for growth, continual learning)
   - What would cause feedback not to be useful? (e.g. overly negative, judgmental opinions)
   Record the responses on flip chart paper and post on a wall once the discussion has ended.

3. Next, ask the team members to work individually, spending a few minutes to think about and jot down some thoughts on the question “What aspects of the team’s work do you want to both give and receive feedback about?” If necessary, give an example to get the discussion going, for instance, “To what extent do we use appropriate language with families?”

4. When everyone has had a chance to jot down some thoughts, ask for volunteers to offer their ideas as you write them on another flip chart page. When the list is complete, post it on the wall.

5. Ask the team members if they are all comfortable giving each other feedback in the aspects of the team’s work just identified. Lead a discussion to clarify and reach consensus on the list – build a list that each team member can support.

6. Next, identify the manner in which the team members want to both give and receive feedback by leading a discussion around the question: What ground rules can we agree to about the ways in which we will give each other feedback? If necessary, give an example to get the discussion going, for instance, “We will point out behavior rather than use labels for one another.”

7. Lastly, ask the team to identify a plan to revisit the topic of giving and receiving feedback periodically to evaluate how it is going and to tweak the ground rules as necessary. (e.g. “We will discuss our plan for giving and receiving feedback at a team meeting in two months to check in with each other about how it’s going.”)
Changing Communication Behaviors

The following activities might be useful for practicing new communication behaviors.

**Walking In Another’s Shoes**  
(From Seagal and Horne, 1997 p. 218)
Practice “living” another personality dynamic for a time (during a meeting, for example). For example you might choose to:
- Slow down.
- Speak more deliberately.
- Speak with enthusiasm and emphasize important words.
- Practice connecting with others more personally by sharing something you normally wouldn’t.
- Focus on one thing at a time.
- Pause before speaking.

Notice how you feel. Is it different? Does the experience change your perceptions? Will it change your future behavior? What have you learned from it? Ask others for feedback. Did they notice anything different about you or your participation?

**Changing Habits**  
(From Seagal and Horne, 1997 p. 222)
Our habits have been created out of countless repetitions. The more deeply ingrained a pattern, the harder it is to change. The following practice is exceedingly simple in structure, but surprisingly challenging to use.

Identify a behavior you want to adopt or stabilize, or a quality you wish to nurture in yourself. For example, you might decide that you want to allow a colleague to speak without interruption, or you may decide that you will practice a personal development exercise every morning. Whatever behavior you select, repeat it consistently over a 21-day period. If you forget the practice, you must begin again at Day One!

In addition to team meetings, team members need to agree on ways that they will keep in touch between meetings.

**Key Questions:**

1. What are each team member’s preferences for ways to exchange information?
2. What are the team members’ shared expectations for communication, e.g. quickness in responding to requests, confidentiality?
3. To what extent will the team members use a variety of communication methods for which purposes:
   - Telephone?
   - E-mail?
   - Fax?
   - Instant messaging?
   - Face-to-face meetings?
4. What will the team do to assure confidentiality and comply with HIPPA and other regulations when transferring documents or communicating about children and families?
Conflicts are inevitable. Invest the time to plan how your team will deal with conflicts when they arise and make sure that all team members learn skills for conflict resolution. Below is a brief outline summary for one conflict resolution model based on:

**Strategy 1: Separate the person from the problem**

Agree that there is a disagreement.
- Try to put yourself in the shoes of the other person.
- Don't blame the other person for your problem.
- React honestly -- try not to react so emotionally that you are unable to solve the problem.

**Strategy 2: Establish interests, goals, priorities**

- All parties should take the opportunity to define how they see the problem and to identify their goals and desired outcomes, without jumping too quickly to solutions or hard and fast positions.
- Try to identify mutual goals when possible. Look for things in which you can agree on.
- Try to be flexible and open to a compromise if it achieves your goals to a level with which you are comfortable.

**Strategy 3: Generate options that can achieve a win-win position**

- Based on the goals of each person, brainstorm as many options for solving the problem as possible.
- Make no premature decisions or judgment on the options until all options have been explored.
- If it is difficult to generate creative options, consider inviting others who can help brainstorm.

**Strategy 4: Strive for agreement**

- Recognize that people may want time to digest information and weigh the options with their family. Avoid pushing each other to make hasty decisions.
- Evaluate options in terms of effectiveness in meeting each party's goals.
- Mutually agree upon the outcome that best meets the needs of all parties.
- Develop agreement as to the next steps.
  If it is difficult to come to agreement, consider inviting others who can help brainstorm.
Regularly scheduled effective team meetings are essential to effective transdisciplinary functioning. This section of Nuts and Bolts offers guidance on structuring and conducting productive and satisfying meetings.

Structuring Meetings ................................................................. 27
Developing Meeting Guidelines and Ground Rules .................. 28
Team Members’ Roles for Meetings ........................................... 30
Sample Team Meeting Agenda Worksheet ............................ 31
Organize and Distribute Team Meeting Minutes ..................... 32
Key Practices for Team Meetings ............................................ 33
The ability to have effective team meetings is a basic element for a team’s relationships and performance. It is essential that teams deliberately design the kinds of meetings that they have.

Following are key questions that teams should consider to help them create an effective and satisfying team meeting structure.

Key Questions:

- How many meetings will there be per month?
- On what dates will meetings occur?
- What times will the meetings begin and end?
- What equipment and materials are needed for a successful meeting?
- Where will the meetings occur?
- Who will play which team meeting roles?
- Will team meeting roles and chores be standing or rotating?
- What kind of agenda and time management will be used?
- What kinds of meeting documentation are required by the team? By funders? By the Colorado Department of Education? By local Early Childhood Connections programs or Community Centered Boards?
- Are all team members required to attend each team meeting in person?
- How will the team balance devoting time to accomplishing tasks and building and maintaining relationships?
- What are the team members’ shared expectations/ground rules for meetings? (see next page)
Developing Meeting Guidelines and Ground Rules

Decide on group guidelines or ground rules for meetings that will help the team members spend time together in satisfying and productive ways. Ground rules might be logistical or might establish clear rules of behavior expected of the members. Whatever they are, they should establish the conditions that will support the group to achieve its goals.

Examples of issues that the group may wish or need to develop guidance:

- attendance
- promptness
- level of participation
- courtesies
- breaks
- interruptions, e.g. cell phones, pagers
- dealing with conflict
- solving problems and making decisions
- brainstorming and generating ideas (e.g. Defer judgment – no criticizing or commenting/Quantity breeds quality -- develop many ideas/Piggybacking is fine – combine and improve ideas/Set a time limit -- take a break from the problem)
- side conversations
- use of respectful people-first language
- other norms
- rotation of routine chores/other norms

Activity to Consider

Decide on group guidelines or ground rules by answering questions such as the ones offered below – don’t try to answer them all, but choose one or two questions that you think address the needs of the team. After the group comes to agreement, have the ground rules typed up and distributed to the members. You may choose to review the ground rules at the beginning of meetings or just have them available. The ground rules will also be a valuable aid in orienting new members to the group.

Sample questions:

“What logistical ground rules do we agree to (attendance, promptness, etc.)?

“How shall we communicate with each other in ways that will make us feel good about ourselves and want to give our all to the team?”

“What behaviors will maintain a healthy, safe atmosphere for sharing and risk-taking?”

“What are our preferred codes of conduct at meetings?”

“How will we give each other constructive feedback in ways that will be useful and not attacking?”
Sample Ground Rules from a Recent Workgroup Meeting

Everyone:

- Has an equal opportunity to participate.
- Communicates respect for one another.
- Honors one person speaking at a time.
- Takes responsibility for helping this to be a successful meeting.
- Expresses any concerns or considerations to the facilitator.
# Team Members’ Roles for Meetings

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
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</table>
| **Facilitator**             | - Coordinates group process and decision making.  
                              - Remains neutral on the issues; relinquishes facilitator role temporarily to express opinion.  
                              - Guides the group to establish the agenda and move through the agenda.  
                              - Balances task and relationship needs in group; helps overcome obstacles.  
                              - Assures participation from all team members.  
                              - Facilitates conflict management.  
                              - Provides feedback to group on process and accomplishments.                                                                                          |
| **Recorder**                | - Documents in writing, aspects of the meeting that the team wants to capture, e.g. attendance, major ideas generated, decisions made, actions to take, items for follow-up, and persons responsible.  
                              - Clarifies intent with speakers when needed to assure accuracy.  
                              - Distributes meeting notes in a timely fashion, confirming the date, time, location, meeting roles (if the rotate), and agenda for the following meeting.   |
| **Timekeeper**              | - Makes sure meetings begin and end on time.  
                              - Reminds group when time allotted for an agenda item is coming to a close.  
                              - Assists with allocating sufficient time for an agenda item, considering other items on the agenda.                                               |
| **Group member**            | - Commits to the group and the process.  
                              - Participates actively.  
                              - Listens to the ideas of others.  
                              - Remains open to new information and ideas.  
                              - Displays patience with others, processes, ideas.  
                              - Is hard on issues, soft on people.  
                              - Shares responsibility for managing the process; supports the facilitator.  
                              - Helps the facilitator and recorder stay in their roles,  
                              - Follows through on commitments.  
                              - Provides encouraging feedback to others regarding task and relationship aspects of the group process.  
                              - Acts as “jargonbuster” – requests definition for unfamiliar terms and monitors the use of people-first language.  
                              - Helps solve problems and resolve conflict.                                                                                                           |
| **Observer, Coach**         | - From time to time, a group might find it useful to have someone observe a meeting and give constructive feedback on issues related to the group’s relationships or performance of tasks. |
| **Food Bringer**            | - One word: chocolate.                                                                                                                                                                                            |
## Sample Team Meeting Agenda Worksheet

### Roles for the Day

- **Facilitator:**
- **Recorder:**
- **Timekeeper:**
- **Encourager:**
- **Team members and/or guests present:**

### Meeting Date ____________________________  Meeting Time ____________________________

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One essential part of meetings is recording notes and getting them back to the team members right away. Effective team meeting notes are urgently important for many reasons: 1) They help assure that all team members know what is happening and remember what tasks they need to do; 2) They serve as the “group memory,” preventing the need to rehash the same information meeting after meeting after meeting; 3) They are a great way to archive and document the team’s progress; and 4) They save the team time, by establishing agendas, documenting decisions, and describing action plans.

As you select your methods for recording notes, also plan efficient ways to organize them and get them back to the team members ASAP. Some ideas:

- Plan meetings where you will have access to a photocopier – record minutes on overhead transparencies and at the end of the meeting make copies for everyone so all of the participants leave with all of the ideas generated.
- Don’t capture ideas twice, once by hand and then by typing them up – bring a laptop computer to the meeting.
- If your notes do not need to include a lengthy recap of the discussion, don’t prepare traditional meeting minutes, but rather prepare action notes – record only the ideas generated or the decisions made, and the action steps, assignments, timelines that were agreed to.
- For distribution of the minutes, use the available technology – rather than mailing out minutes or notes, use e-mail.

Lot’s of ways to record notes:

- Paper and pencil
- Flip cart pad (easel, taped on wall, post-it pads)
- Overhead projector
- Note taking templates
- Laptop computer
- Laptop computer with LCD projection
- Audio taping
- Videotaping
Key Practices for Effective & Efficient Team Meetings

- Start the meeting at the scheduled time.
- Balance structure with informality.
- Use agendas throughout the meeting – even though they may have been distributed in advance, have copies available.
- Introduce any guests who are present and clarify people’s roles in the meeting.
- Designate meeting roles:
  - Always have a facilitator (might be an internal or external facilitator),
  - Always have a recorder – take and prepare *useful* minutes and distribute them in a *timely* manner.
- Review the purpose, expected outcomes, and process of the meeting in the beginning – make sure everyone is in agreement.
- If the team has established meeting ground rules, have them available to all members and follow them.
- Avoid letting unplanned announcements and discussions get in the way.
- Adhere to the “100 mile rule”: no one should be called to leave the meeting unless the call is so important that the disruption would have occurred if the meeting was held 100 miles away.
- Clarify and summarize all decisions, plans, assignments, and next steps.
- Set the date, time, & location of the next meeting.
- Draft the agenda for the next meeting.
- Evaluate each meeting. Two key questions:
  1. What went well that the team wants to continue doing at the next meeting?
  2. What might the team do differently next time?
- End the meeting on time.
From time to time, it is important to reflect on how well the team is developing and performing. Some teams do this on an ongoing basis by reflecting on home visits on an ongoing manner, devoting parts of team meetings to self-assessment on one or more aspects of their team functioning. Other teams hold periodic retreats. Still others invite external consultants or facilitators to assist with team assessment and team building activities. However your team decides to do it, self-assessment is an important activity that helps set the stage for the team’s continual quality improvement efforts.

You can assess your team’s overall functioning by choosing from a variety of team assessment instruments available for teams to identify how well they are doing on a variety of dimensions. Recommended instruments include:


From time to time, it may be useful for team members to spend time together to identify personal styles in order to better understand each other and improve communication. There are a variety of self- and peer-assessment instruments designed for this purpose. Instruments focus on a variety of personal styles including: personality/temperament; learning; communication; creativity; leadership; thinking. Note: it is often very helpful to use a trained external facilitator to work with the group in using such tools.

This section offers a variety of reflection and self-assessment tools that can support teams in identifying strengths and areas for improvement.

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Team Characteristics Assessment ..................................................................................36
Assessment of Team Task-Accomplishing and Relationship Building Behaviors .............37
Are You an Effective Team Meeting Facilitator? ............................................................39
How Effective is Your Agenda? ......................................................................................40
Team Meeting Assessment ............................................................................................41
Consider the questions below to reflect on, and learn from, a visit with a family. These questions might be used alone, with another team member following a consultation visit, or during reflective supervision.

1. How do you feel the visit went? Were your words and actions family-centered? What might you consider changing next time to enhance your communication and planning with families?

2. How did you “read” the child’s and/or parent’s reaction to what was done or said?

3. Complete this statement: I felt ___________ when ________________ .

4. How successful was the visit for the family? How do you know?

5. To what extent did the visit reflect effective transdisciplinary teamwork?

6. What does the family want to focus on next?

7. What are the next steps? Who will do what?

8. What other questions might be used to reflect on the experience?
Team Characteristics Assessment

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>Specific examples (positive or negative)</th>
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<tbody>
<tr>
<td><strong>Clear Elevating Goal</strong> A worthwhile and challenging objective which is compelling enough to create a team identity and has clear consequences connected to its achievement.</td>
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<tr>
<td><strong>Results-Driven Structure</strong> A team design which is determined by the objective to be achieved and supported by clear lines of responsibility, open communication, fact-based judgments and methods for providing individual performance feedback.</td>
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<td><strong>Competent Team Members</strong> Team members who possess the essential skills and abilities to accomplish the team’s objectives, and demonstrate a confidence in each other and the ability to collaborate effectively.</td>
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<td><strong>Unified Commitment</strong> The achievement of the team goal is a higher priority than any individual objective and inspires a willingness for members to devote whatever effort is necessary to achieve team success.</td>
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<td><strong>Collaborative Climate</strong> A climate which embraces a common set of guiding values, allowing team members to trust each other sufficiently to accurately share information, perceptions, and feedback.</td>
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<td><strong>Standards of Excellence</strong> A team which establishes high standards and exerts pressure on itself to constantly improve performance.</td>
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<tr>
<td><strong>External Support and Recognition</strong> The presence of the necessary resources and external support required to accomplish the team's objectives, including the appropriate forms of recognition and incentive.</td>
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<tr>
<td><strong>Principled Leadership</strong> The articulation of the team goal in such a way as to inspire commitment and actions which stem from strong adherence to basic principles such as: trusting team members with meaningful responsibility, confronting inadequate performance, and rewarding superior performance.</td>
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(Based on Larson & LaFasto, 1989)
Assessment of Team Task-Accomplishing and Relationship-Building Behaviors

To what extent does your team practice effective task-accomplishing AND relationship-building behaviors?

<table>
<thead>
<tr>
<th>Task-Accomplishing Behaviors</th>
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<tbody>
<tr>
<td><strong>Initiating</strong></td>
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<tr>
<td>- Establishing goals, objectives, or tasks</td>
</tr>
<tr>
<td>- Suggesting processes and procedures</td>
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<tr>
<td><strong>Seeking Information</strong></td>
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<tr>
<td>- Asking for facts</td>
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<tr>
<td><strong>Giving Information</strong></td>
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<tr>
<td>- Offering facts, ideas, opinions, beliefs</td>
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<tr>
<td><strong>Clarifying</strong></td>
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<td>- Probing for meaning</td>
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<tr>
<td>- Explaining ideas</td>
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<tr>
<td><strong>Building</strong></td>
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<tr>
<td>- Elaborating on other’s ideas</td>
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<tr>
<td><strong>Paraphrasing and summarizing</strong></td>
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<tr>
<td>- Restating what someone has said</td>
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<tr>
<td>- Reviewing ideas that have been offered</td>
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<tr>
<td>- Pulling varied ideas together as a whole</td>
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<tr>
<td><strong>Problem Solving</strong></td>
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<td>- Offering alternatives</td>
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<td>- Considering advantages/disadvantages</td>
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<tr>
<td>- Making proposals</td>
</tr>
<tr>
<td>- Testing for group agreement</td>
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<tr>
<td>- Deciding how to decide</td>
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<tr>
<td>- Identifying who will do what by when</td>
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<td>- Summarizing the decision</td>
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<tr>
<td><strong>Managing</strong></td>
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<tr>
<td>- Sharing leadership appropriately</td>
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<tr>
<td>- Using group time well</td>
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<tr>
<td>- Regularly evaluating its performance</td>
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<tr>
<td>Team Behaviors</td>
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<tr>
<td><strong>Relationship-Building Behaviors</strong></td>
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<td><strong>Listening</strong></td>
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<td><strong>Encouraging</strong></td>
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<td><strong>Gatekeeping</strong></td>
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<td><strong>Harmonizing</strong></td>
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Are You An Effective Team Meeting Facilitator?

0 = I don’t do this so well  
1 = I do this okay  
2 = I do this very well

<table>
<thead>
<tr>
<th>Skills</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>Specific examples (positive or negative)</th>
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<tbody>
<tr>
<td>Guide the team to establish and move through the agenda</td>
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<tr>
<td>Focus the team on a given topic for the planned amount of time</td>
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<tr>
<td>Coordinate the group process</td>
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<tr>
<td>Help the meeting to flow smoothly: introduces sections; give directions; summarize; offer transitions, etc.</td>
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<td>Remain neutral on the issues; if need to express an opinion, temporarily relinquish role as facilitator</td>
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<td>Avoid letting one’s personal agenda and biases get in the way of effective facilitation</td>
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<td>Model and encourage respect, active listening, empathy, accommodation for diversity, good humor</td>
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<td>Accept and admit mistakes</td>
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<td>Help to create an open and inviting climate</td>
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<td>Assure participation from all, e.g. engage those who need prompting and address those who dominate</td>
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<td>Address conflict and personal problems within the team</td>
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<td>Suggest processes for brainstorming, problem-solving, and coming to consensus</td>
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<td>Facilitate conflict management</td>
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<td>Adapt flexibly to unforeseen developments</td>
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<td>Facilitate the team to make decisions and determine next steps</td>
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<tr>
<td>Help the group balance accomplishing with maintaining positive relationships</td>
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<tr>
<td>Provide feedback to group on team process and accomplishments</td>
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<tr>
<td>Lead team in evaluating and improving meetings</td>
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How Effective Is Your Meeting Agenda?

0 = the agenda doesn’t do this so well – we need to work on this
1 = the agenda does this okay – but if we do this better, we’ll have better meetings
2 = the agenda does this very well – let’s continue doing this

<table>
<thead>
<tr>
<th>Meeting Characteristics</th>
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<th>1</th>
<th>2</th>
<th>Specific examples (positive or negative)</th>
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<tbody>
<tr>
<td>The agenda is approved by team members</td>
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<tr>
<td>A meeting announcement and agenda is distributed well in advance of the meeting so that all team members can attend and be prepared</td>
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<tr>
<td>The meeting announcement and agenda confirms the date, time, place, directions, parking tips, etc. and lets the team members know what they need to do to prepare for the meeting, e.g. read something, think about something, etc.</td>
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<td>Materials are distributed in advance for the team members to review prior to the meeting</td>
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<tr>
<td>The agenda is realistic in terms of the topics and tasks that can be addressed in the available time</td>
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<td>The agenda is itemized so that the topics to be discussed are clear to all and so the members can come prepared to participate. The following kinds of elements, as appropriate for the specific meeting, are detailed for each topic: • purpose/outcome/product of the topic • discussion leader/presenter for the topic • relevant materials • time allowed for the topic</td>
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<td>Time is planned into the agenda for relationship building and maintenance as well as accomplishing tasks</td>
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<td>Appropriate time for breaks is scheduled in the agenda</td>
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<td>Time is reserved at the end of a meeting for summary, determining next steps, developing the agenda for the next meeting, and evaluating the meeting</td>
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Use this meeting assessment worksheet to identify areas of strength and areas for improvement of your team meetings.

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<th>Rate Your Team</th>
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<th>6</th>
<th>7</th>
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<td>Scheduling is vague or misleading</td>
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<td>Meeting location is not the best place for this meeting</td>
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<td>Meeting time is not the best</td>
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<td>Members often don’t show up, come late, or leave early</td>
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<td>Meetings are too long or too short</td>
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<td>The team meets too often</td>
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<td>Meeting roles are unclear (note-taker, facilitator, etc.)</td>
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<td>The meeting has no agenda; lack focus and waste time</td>
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<td>The agenda is not sent out in advance</td>
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<td>The team doesn’t have ground rules, but needs them</td>
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<td>Members do not arrive prepared for the work at hand</td>
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<td>Members don’t fully “invest” and participate</td>
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<td>Members frequently get off the subject</td>
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<td>Members frequently interrupt one another</td>
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<td>Preparation is lacking (materials, AV, etc.)</td>
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<td>Meetings start late or end late</td>
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<td>There is no social time for “catching up” with team mates</td>
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<td>Meetings are boring</td>
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<td>Meetings end without clear plans and action steps</td>
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<td>There is no reflection or evaluation of the meeting</td>
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<td>No snacks</td>
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Scheduling is clear
Meeting location works fine
Meeting time works fine
Everyone arrives on time and stays until the end
Meetings are the right length of time
The frequency of our meetings is just right
Meeting roles are clear
The meeting has an agenda that helps the team work
The agenda is sent out in advance
The team uses effective ground rules well
Everyone arrives prepared for the work
Everyone participates fully
Members stay on topic
Members listen to others & wait their turn to speak
All of the preparations are made
Meetings start and end on time
There is social time to connect with team mates
Meetings are engaging and interesting
Meetings end with clear plans and action steps
Members regularly reflect on/evaluate the meeting
Satisfying snacks
References


ERIC. (1989). *Early Intervention for Infants and Toddlers: A Team Effort*. ERIC Digest #461. ERIC Identifier: ED313867 ERIC Clearinghouse on Handicapped and Gifted Children Reston VA.


Western Health Sciences, School of Occupational Therapy, *Case Studies in Gerontology for the Applied Heath Sciences* [http://publish.uwo.ca/~shobson/casestudy_index.html](http://publish.uwo.ca/~shobson/casestudy_index.html)

**Video:**


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ENRICH Outreach: Nuts and Bolts for Transdisciplinary Teams (1/23/06)