**Conducting Leadership Team Meetings Self-Assessment**

(Adapted from Sugai & Todd, 10-22-03)

This Self-Assessment has been developed to facilitate the preparation, conducting, and evaluation of leadership team meetings. As a team, place and “X” in the appropriate box.

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|  | **STATUS:** |
| **PREPARING:** | In Place | Partially In Place | Not In Place | N/A |
| Review agreements/tasks from previous minutes |  |  |  |  |
| Identify/review/develop agenda items |  |  |  |  |
| Invite/remind/prepare participants |  |  |  |  |
| Prepare/review materials |  |  |  |  |
| Check/confirm logistics (e.g., room, location, time) |  |  |  |  |
| Data Analyst prepares data for meeting (e.g. Academic & Behavior) |  |  |  |  |
| **BEGINNING:** |  |  |  |  |
| Acknowledge/introduce participants |  |  |  |  |
| Review purpose |  |  |  |  |
| Review/assign roles |  |  |  |  |
| Rotate meeting role responsibilities (e.g. facilitator, time keeper) |  |  |  |  |
| Review/modify agenda items (e.g., discussion, decision, information) |  |  |  |  |
| Assign # of minutes for each agenda item |  |  |  |  |
| Set/review meeting rules/routines (Routines below) |  |  |  |  |

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| **CONDUCTING:** |  |  |  |  |
| Follow agenda items |  |  |  |  |
| Stay within timelines |  |  |  |  |
| Follow/review rules/routines |  |  |  |  |
| Restate/review/remind of purpose/outcomes |  |  |  |  |
| Use the TIPS model to review data and problem solve  |  |  |  |  |
| **CONCLUDING:** | In Place | Partially In Place | Not In Place | N/A |
| Review purpose |  |  |  |  |
| Review/summarize agreements/products/assignments |  |  |  |  |
| Review/evaluate extent to which agenda items addressed |  |  |  |  |
| Review new agenda items |  |  |  |  |
| Review compliance with rules/routines |  |  |  |  |
| Acknowledge/reinforce participation/actions/outcomes |  |  |  |  |
| Indicate next meeting date/time/place |  |  |  |  |
| Share workload among team members |  |  |  |  |
| **FOLLOW-UP:** |  |  |  |  |
| Distribute minutes to team and other stakeholders |  |  |  |  |
| Complete agreements/products/assignments |  |  |  |  |
| Contact/remind participants |  |  |  |  |
| Prepare for next agenda |  |  |  |  |
| Share data and successes with staff |  |  |  |  |

**Routines for Conducting Effective and Efficient Meetings**

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| 1. How are decisions made?
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| 1. How are problems/conflicts/disagreements resolved/processed?
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| 1. How are roles/responsibilities (e.g., leadership/facilitation, recording minutes, reporting) assigned and conducted?
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| 1. How is participation encouraged/reinforced?
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