

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness



**A Performance-based Learning Module
for Georgia's Educational Leaders**

Related Modules

Related GLISI Modules

Other modules related to this topic include:

- *Leading a Team to Analyze and Display Data Using Quality Tools*
 - *Leading Group Decision-making*
 - *Leading Tactical Meetings*
 - *Leading Team Discussions*
-

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Progress Tracker

		Completed	Date
Preparing	Review Performance Objective	<input type="checkbox"/>	_____
	↓		
	Review Final Assessment*	<input type="checkbox"/>	_____
	↓		
Learning	Topic 1: Establishing Effective Meeting Procedures	<input type="checkbox"/>	_____
	↓		
	Topic 2: Documenting Effective Meeting Notes	<input type="checkbox"/>	_____
	↓		
	Topic 3: Conducting an Effective Meeting Audit	<input type="checkbox"/>	_____
	↓		
Practice (Safe)	Final Practice	<input type="checkbox"/>	_____
	↓		
Performing	Final Assessment	<input type="checkbox"/>	_____

* (See note below*)

* You may proceed to the Final Assessment if you are already proficient in the required knowledge, skills, and behaviors.

Module Completed – Congratulations on Your Performance!**	
Date of Final Assessment Performance:	
Performer's Name:	Performer's Signature:
Performance Coach's Name:	Performance Coach's Signature:

**Include this page in the evidence you enter into your portfolio.

Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"> • A minimum of four hours divided into several sessions • A newly formed team within the organization • Supplies necessary to conduct a meeting (i.e. flip chart, markers, note pads, etc.) 	<p>Conduct an effective meeting by:</p> <ul style="list-style-type: none"> • Establishing Effective Meeting Procedures • Documenting Effective Meeting Notes • Conducting an Effective Meeting Audit 	<ul style="list-style-type: none"> • The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment • GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment

Module Introduction

Conducting Effective Meetings

Conducting Effective Meetings is a Performance-based Module containing specific strategies and tools for improving the efficiency and productivity of group members in completing work assigned to them in a team environment. In this module you will learn to conduct effective meetings that will save time and resources of your team. You will learn to establish team guidelines, meeting procedures and conduct a meeting audit to ensure that expectations were met and the purpose was accomplished.

This module represents a value-added leadership skill, which is important to your development as a leader across all roles. Therefore, this module is relevant to and may be taught with other Performance-based Modules.

The Importance of Effective Meetings

Committees and/or teams are necessary in the work of school improvement to promote collaboration, build consensus, obtain commitment, and complete necessary tasks.

Productive meetings require planning. In schools, time is wasted with unproductive meetings. Participants should come to meetings knowing the following:

- What to expect (Purpose)
 - Why they are there (WIIFM – What’s in it for me?)
 - Who will be there
 - What is their role
 - How long is the commitment
-

What is the Leader's Role?

As the leader, you have responsibilities before, during, and after meetings. These responsibilities include:

- Making meeting arrangements
 - Communicating the time, date, and location of meetings
 - Creating and distributing a written agenda
 - Involving all members in discussion during meetings
 - Assigning meeting roles
 - Helping the group shape the wording of their decisions
 - Communicating with the recorder during the meeting to document accurate wording of the team's decisions
 - Adhering to the prepared agenda
 - Distributing minutes of the meeting to all concerned stakeholders
 - Closing the meeting and conducting an evaluation
 - Following up on meeting decisions
 - Recording the decisions accurately
-

What Resources are Used to Conduct Effective Meetings?

As part of preparing to conduct an effective meeting, the following resources should be on hand:

- Reliable communication system to announce meetings
 - Professional setting for the meeting, including a room with sufficient space and light, a conference table (preferably round), and comfortable seating
 - Reliable audio-visual equipment
 - Printed agendas and backup discussion materials for all participants
 - Flip charts or a projector, as well as a computer to record and display the generated information
-

Begin With The End in Mind

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
 - Understand the standards (performance criteria) by which your performance will be assessed
 - Gauge your current level of performance against what will be expected of you by the end of the module
 - Prioritize which areas to concentrate on as you work through the module
-

Electronic Forms

For your convenience, the forms in this module are available in electronic format. See the file, *Conducting_effective_meetings_eForms.docx*, included with this module.

Topic 1: Establishing Effective Meeting Procedures

Effective Meeting Procedures

Effective meeting procedures are practices that enhance the productivity of team meetings. They help meetings stay on task, end on time, and accomplish the task(s) for which they were called.

It is important that the leader establish a culture of collaboration and cooperation to ensure the execution of effective decision making skills.

Effective meeting procedures, such as setting an agenda, establishing ground rules, and distributing meeting notes, dictate a structured process by which the team proceeds through the meeting. Structure maximizes the opportunity to stay focused on the items at hand and allows for all members to have the same perception of what happened during the meeting. The perception your team has of your leadership capabilities will impact your ability to effectively lead the meetings. Structure generally impacts the perceptions that team members have about the organizational abilities of the leader.

What Resources Are Required?

- Agenda
 - Materials for taking notes
 - Meeting feedback form
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Review the meeting purpose	Review the purpose of this meeting and ask for input from the team members.
2. Conduct introductions	<p>Introduce all participants. If this is the first meeting or new people have joined the team, introductions are necessary. This can be done through a variety of “ice breakers” or simple introductions. Keep introductions brief.</p> <p>This also is the time to identify any aspects, personal or otherwise, that may affect the progress of the meeting. For example, some team members may have other meetings or commitments that would require them to leave early.</p>
3. Record attendance	<p>Ask that each participant sign in for the meeting and provide contact information. This can be done as they walk in the room or by using sign-in sheets at the tables.</p> <p>Contact information for the team can be distributed with the meeting notes to allow each person the ability to interact with the others between meetings. Be sure to ask each team member if his/her contact information can be shared among the group.</p>
4. Record meeting notes	<p>As the leader, assist the team as needed in selecting team members for the roles of recorder and timekeeper.</p> <p>The recorder takes the meeting notes at each meeting and then distributes them to all of the team members within 24 hours after the meeting.</p> <p>The timekeeper keeps general time during the meeting as well as helps the leader to stick with a timed agenda (if it is used) to be sure all agenda items are addressed during the course of the meeting.</p> <p>When meeting roles are identified, the length of time each team member will serve in a position should also be established. For example, the recorder and timekeeper may serve for one year in their position, and then the positions may rotate to different team members. Rotating the positions allows for more people to participate in leadership roles.</p> <p>After the recorder and timekeeper have been chosen, their names and positions should be recorded in the initial meeting notes under role selections.</p> <p>NOTE: The roles for the meeting can be selected ahead of time, as well. Some groups prefer to have these positions consistent through the duration of the entire process or for a specific time period. Another option for rotating the roles is to ask for volunteers or assign the roles at the end of the meeting for the next meeting.</p>

Topic 1: Establishing Effective Meeting Procedures

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Step	Action
<p>5. Establish and approve the agenda</p>	<p>Engage the team in establishing and approving the agenda, including selecting the person responsible for each item and the allocated time for each listed item.</p> <p>Each discussion item should be recorded in the meeting notes under the appropriate agenda topic. The notes should also record the team member responsible for the agenda item and the amount of time allocated to the discussion or presentation.</p> <p>The agenda may be created and distributed prior to the meeting. Agenda items can be generated in the days leading up to the meeting. In this case, it is only necessary to amend and approve the agenda.</p> <p>Distributing an agenda prior to the meeting allows the participants to prepare for the meeting and to know what to expect at the meeting. In doing this, the participants can gather relevant background material or information, as well as prepare for their participation. Team members can also contribute to the agenda if there is time for added discussions or information sharing.</p> <p>In such a case, it is imperative that time allotments be listed beside agenda items to keep extemporaneous conversations and discussions from guiding the meeting from the intended objective(s).</p>
<p>6. Review the central purpose of the team</p>	<p>Review all aspects of effective meeting guidelines with a special emphasis on the function or objective of the team.</p>

Step	Action
7. Establish ground rules	<p>Ground rules are the guidelines that monitor the behavior of the team and should not be confused with the basic rules that allow you to conduct the meeting in an effective manner.</p> <p>As the leader, you should engage the team in determining or reviewing ground rules for the operation of the team. Ground rules include, but are not limited to:</p> <ul style="list-style-type: none"> • Establish a “parking lot” for clarifying issues <ul style="list-style-type: none"> ○ The parking lot is for questions that cannot be answered in the meeting and require more research. For example, a standard operating procedure that has been changed or requires the contact of another person would be an item for the parking lot. • One person talks at a time with no side conversations <ul style="list-style-type: none"> ○ This allows for the team to keep its focus and ensures that no one misses important information. • Use active listening and paraphrasing <ul style="list-style-type: none"> ○ Active listening requires that the participants respond to discussions in the meeting by reviewing items discussed. • Use positive comments or responses only <ul style="list-style-type: none"> ○ Remind the participants to remain positive during the meeting—both in actions and in words. Negative or sarcastic comments or responses will not be tolerated. • Breaks <ul style="list-style-type: none"> ○ Set a timetable (five minutes every hour or fifteen minutes every two hours) so that the participants know when breaks occur and can focus on the meeting. Explain that all disruptions cannot be avoided, but ask them to respect others by trying to limit them as much as possible. For example, ask that cell phones be turned off and checked only during breaks. <p>Note: Ground rules should be established at the initial meeting only. Once these ground rules are established, they should be recorded in the initial meeting notes under “ground rules.” It is important to work with the team on the development of the ground rules. By reaching consensus, team members are more likely to adhere to the rules.</p>

Topic 1: Establishing Effective Meeting Procedures
 Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Step	Action
8. Determine a consensus-building process for making decisions on agenda items	<p>The consensus-building process is included in the initial meeting only.</p> <p>Determining and agreeing to a consensus-building process is very important for all members and for the success of the team. In order to reach consensus, it is not necessary that everyone in the group agree on the item at hand. However, it is necessary that everyone states that they can live with it and support it verbally and by their actions.</p> <p>The implementation and description of the decision that the team agrees to must be made very clear to avoid misunderstandings among the team members. For more information, refer to GLISI modules <i>Leading Teams in Discussions</i> and <i>Leading Teams Through Decision-Making Processes</i></p> <p>Choose a process to aid the team to reach consensus during the decision making process. During the first meeting, teach the team how to use the consensus-building process, how to address minority concerns, and how to amend final decisions. The process should be stated on the tentative agenda and should express contributions by each member. The process should be documented in the meeting notes under consensus-building process.</p>
9. Discuss agenda items and determine outcomes	<p>Direct the team through the agenda items and discuss the possible outcomes. When considering each item, suggestions for achieving the desired outcomes should be discussed among the group and then assigned to those responsible for their completion in the given timeframe.</p> <p>As each agenda item is completed, the responsible parties should summarize their task and their commitment. This ensures that everyone understands what he/she is expected to do.</p>
10. Review meeting outcomes	<p>In closing the meeting, summarize the agenda items including attendance, agreements, action items/assignments, and preliminary items for the next meeting's agenda.</p>
11. Debrief the team process	<p>Engage the team in completing a meeting audit on meeting outcomes.</p> <p>This audit should be completed at least every second or third meeting in order to evaluate the effectiveness of the meetings and to keep the team on track with their specified mission and goals. A quick audit can serve as a good wrap-up for each meeting, as well.</p> <p>NOTE: Meeting results should be recorded in the meeting notes under the debriefing the team process.</p>
12. Distribute meeting notes	<p>Verify that the meeting notes are accurate and contain the correct grammar and punctuation. The recorder should distribute the meeting notes within 24 hours of the meeting.</p> <p>NOTE: Verification should be recorded in the meeting notes under distribute meeting notes.</p>

Topic 1: Establishing Effective Meeting Procedures
Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Step	Action
13. Follow up on action items	<p>As the leader, you should keep in touch with the team members. Assess their progress between meetings on the responsibilities to which they have been assigned, and redirect them as necessary. At the beginning of the next meeting, recognize accomplishments. Discuss delays or failures to determine possible solutions.</p> <p>Possible questions include:</p> <ul style="list-style-type: none">• Were you able to accomplish your goal from the last meeting? Why or why not?• What effect did it have on the learning strategy?• What difficulties did you have?• How did you overcome the difficulties?

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Apply the steps presented in this topic to conduct an effective meeting.

Practice Worksheet

Review the meeting purpose. In the space below, write:

- The purpose of the meeting
- Input from team members

Conduct introductions. In the space below, describe the “ice breaker” or other activity used to introduce team members.

Practice Worksheet

Record attendance in the space below or on a separate sign-in sheet.

Select team members for the roles of recorder and timekeeper and list their names below.

Recorder	
Timekeeper	

Establish and approve the agenda. List the agenda items in the space below. Record meeting notes in the space provided.

Agenda Items	Notes
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Practice Worksheet

Review the central purpose of effective meetings. Write the function or objective in the space below.

Establish ground rules. List the ground rules in the space below.

Practice Worksheet

If this is an initial meeting, determine a consensus-building process for making decisions on agenda items. Summarize the process in the space below.

Discuss agenda items and determine outcomes. Add notes to the agenda items listed earlier.

Review meeting outcomes. List the outcomes below, including action items and preliminary items for the next meeting's agenda.

Practice Worksheet

Debrief the team process. In the meeting notes, list at least two aspects of the meeting that went well, and two areas that need improvement.

Distribute meeting notes. In the meeting notes, add a note confirming that the meeting notes were distributed.

Follow up on action items. List 3 to 5 follow up questions in the space below.

Topic Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Review meeting purpose	<input type="checkbox"/> Meeting purpose is defined	<input type="checkbox"/> Yes
	<input type="checkbox"/> Input from team members present	<input type="checkbox"/> No
2. Conduct introductions	<input type="checkbox"/> Description of "ice breaker" or other activity is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
3. Record attendance	<input type="checkbox"/> Attendees are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
4. Record meeting notes	<input type="checkbox"/> Meeting notes are present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
5. Establish and approve the agenda	<input type="checkbox"/> Agenda items are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
6. Review the central purpose of the team	<input type="checkbox"/> Team function or objective is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No

Topic 1: Establishing Effective Meeting Procedures
 Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
7. Establish ground rules	<input type="checkbox"/> Ground rules are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Determine a consensus-building process for making decisions on agenda items (Applicable for initial meeting only)	<input type="checkbox"/> Summary of consensus-building process is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Discuss agenda items and determine outcomes	<input type="checkbox"/> Discussion notes have been added to the agenda items	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Review meeting outcomes	<input type="checkbox"/> Outcomes are present and include action items and preliminary items for the next meeting's agenda	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Debrief the team process	<input type="checkbox"/> Meeting notes include two or more aspects of the meeting that went well <input type="checkbox"/> Meeting notes include two or more areas that need improvement	<input type="checkbox"/> Yes <input type="checkbox"/> No
11. Distribute meeting notes	<input type="checkbox"/> Meeting notes include confirmation that the notes were distributed	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Follow up on action items	<input type="checkbox"/> Action items include three or more follow up questions	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Documenting Effective Meeting Notes

Effective Meeting Notes

Effective meeting notes are accurate and easy-to-read records of what a team accomplishes in a meeting. A standardized format should be used, so the participants are able to easily identify items from meeting to meeting. These are not word-for-word recordings of the meeting, but summaries of key points and decisions made during the meeting.

Effective meeting notes include:

- Times, dates, and locations of the meeting and future meetings
- Participants and their roles
- Key discussion topics and decisions made
- Assignments and responsibilities
- Side issues

Why Effective Meeting Notes?

Meeting notes are the official records of the team's organization and progress. Teams must have accurate and easy-to-read records of what they accomplish and what they plan to do from meeting to meeting. Meeting notes also establish the preliminary agenda for what the team plans to address at the next meeting. Meeting notes perform the function of keeping everyone focused on mutually-agreed upon work.

When are Meeting Notes Created?

The recorder appointed by the team takes organized notes during the meeting and then shares them with the group within 24 hours. Meeting notes should be first taken at the proposal or startup phase of the formation of the group or team in order to record valuable information about initial plans and projections that might otherwise be lost.

**When Do I
Begin This Task?
(Cues)**

This task is begun after the meeting is held to summarize the meeting discussions and to capture action items that occurred in the meeting. The notes also set up events and help to plan the agenda for the meeting that is to follow.

**What is the Leader's
Role?**

The leader's role is to insure that meeting notes are completed and accurately reflect the deliberations that occurred in the meeting. Grade level or team meeting notes should be submitted to the school administration after the meeting and filed for future reference as needed to document discussions and actions.

**What Resources Are
Required?**

Resources include a notebook or file to house the meeting notes for future reference.

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Title the meeting notes	Direct the recorder to include the following in the title of the meeting notes: <ul style="list-style-type: none"> • Team name • “Meeting notes” as the subject • Date
2. Record attendance	The recorder lists the members in attendance, as well as those who are absent. NOTE: Attendance can be taken at the door or at the tables by providing the participants with a sign-in sheet.
3. Record agreement items	Direct the recorder to note major discussion points and list the consensus agreements of the team as they are made.
4. Record action items	Direct the recorder to list the action items determined by consensus of the team as they are decided. Action items should include the task, the individual(s) responsible for completing the task, and the expected completion date (due date).
5. Determine agenda items	Direct the recorder to list the tentative items for the agenda of the next meeting as they are decided.
6. Determine next meeting date and location	Direct the recorder to list the next meeting date and location agreed upon by the team.
7. Determine any parking lot items	Direct the recorder to list any additional items agreed upon by the team for consideration at a later time. Assign these items to an individual, along with a due date for the item and the date they were placed in the parking lot.

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

While attending a school-related meeting, such as a staff meeting or committee meeting, document effective meeting notes in the practice worksheet on the following pages.

Practice Worksheet

Meeting Notes for (subject) _____ on (date) _____ for _____(team name)

Attendance:

Members Present

Members Absent

Agreements:

- 1.
- 2.
- 3.
- 4.
- 5.

Action Items	Person Responsible	Due Date
1.		
2.		
3.		
4.		
5.		

Practice Worksheet

Tentative agenda topics for next meeting:

Next meeting date and location:

Parking Lot Items	Person Responsible	Date Placed in Lot
1.		
2.		
3.		
4.		
5.		

Topic Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Meeting notes title	<input type="checkbox"/> Subject, date, and team name are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Attendance list	<input type="checkbox"/> List includes team members who are present and those who are absent	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. List of agreement items	<input type="checkbox"/> Consensus agreements are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. List of action items	Action items include: <input type="checkbox"/> Task <input type="checkbox"/> Individual(s) responsible for completing the task <input type="checkbox"/> Due date	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. List of agenda items	<input type="checkbox"/> Tentative agenda items for the next meeting are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Documenting Effective Meeting Notes

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
6. Specified next meeting date and location	<input type="checkbox"/> Date and location for the next meeting are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. List of any parking lot items	Parking lot items include: <ul style="list-style-type: none"> <input type="checkbox"/> Item <input type="checkbox"/> Individual(s) responsible for the item <input type="checkbox"/> Date placed in parking lot 	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 3: Conducting an Effective Meeting Audit

Effective Meeting Audit

Conducting an audit, or review, of how well the team is operating gives you, the leader, and the team feedback on how to improve the effectiveness of future meetings. This process is completed through the use of a questionnaire, where the team members rate the effectiveness of the meeting. In this topic, you will learn how to conduct an audit through the use of a questionnaire and follow up discussion.

Why Effective Meeting Audit?

Unless asked specific questions in a controlled environment and confidential manner, team members may be reluctant to offer unsolicited suggestions. The potential result may be that members leave the team because of an increased level of frustration and disenchantment with the way the work is being done. A meeting audit conducted early in the process may discourage discontent among team members and may bring to the surface conditions that, when corrected, would encourage participation and productivity. Meeting audits, if used frequently and in a non-threatening manner, may provide feedback of the team's deliberations toward given objectives. The audit also serves to evaluate the effectiveness of the team members in meeting their individual and collective goals.

**When Do I
Begin This Task?
(Cues)**

Indicators that signal the need for a meeting audit include, but are not limited to, the following:

- One or more meetings have been less than optimal. For example:
 - You did not accomplish all agenda items.
 - Team member participation/interaction is low.
 - Team members appear frustrated.
 - Attendance is low.
 - Action items are not being completed.
 - One or more participants express a need for improving the meeting process.
 - A significant amount of time has passed since the last audit.
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Create and distribute a questionnaire	<p>Create a questionnaire for capturing feedback during the meeting effectiveness audit, or use the first two pages of the Practice Worksheet in the Topic Practice. Distribute the questionnaire to all team members and complete one for yourself.</p> <p>Using the questionnaire, team members will rank the items on a scale of 1 to 5, and then add comments as needed.</p>
2. Check for focus of the meeting	<p>Using the questionnaire, team members determine the extent to which the meeting followed the specified agenda and how the team performed on these items.</p>
3. Check for contributions to decisions by team members	<p>Using the questionnaire, team members determine the extent to which each team member participated in the discussions that led to decisions during the meeting.</p>
4. Check for effective communications by team members	<p>Using the questionnaire, team members determine the extent to which interruptions and side conversations diverted the team's attention away from members recognized to speak.</p>
5. Check for implementation of meeting procedures	<p>Using the questionnaire, team members determine the extent to which the leader, recorder, and timekeeper contributed to the effectiveness of the meeting procedures.</p>
6. Check for team results	<p>Using the questionnaire, team members determine the extent to which the team achieved its desired goals during the meeting.</p>
7. Lead discussion for improvement	<p>Lead a team discussion about meeting successes and problem areas revealed through the completion of the questionnaire.</p> <p>As a group, clarify why some aspects of the meeting were successful and why others need improvement. Brainstorm strategies for solving or minimizing problems.</p> <p>Collect and review the surveys, cross-referencing the information with notes from your team's discussion.</p>
8. Document meeting audit action items	<p>Document problem areas identified in the audit, the action items designed to solve or minimize the problems, and the team members responsible for following through with the action items.</p>

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Follow up a small, school-related meeting, such as a committee meeting, by conducting a meeting audit. Complete the Practice Worksheet on the following pages. Refer to the Step-Action Table as needed.

Practice Worksheet

Effective Meeting Audit for (team name) _____ on (date) _____

Rate each questionnaire item as follows:

Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
1	2	3	4	5

1. Team Focus _____

The team followed the agenda and stayed on track.

Successes:

Problems:

Potential solutions:

2. Team Member Contribution _____

All members participated in discussions leading to decisions made during the meeting.

Successes:

Problems:

Potential solutions:

Practice Worksheet

3. Team Member Effective Communications _____

Team members did not divert the team's attention away from a member recognized to speak with interruptions and side conversations.

Successes:

Problems:

Potential solutions:

4. Role Implementation _____

The leader, recorder, and timekeeper implemented meeting procedures effectively.

Successes:

Problems:

Potential solutions:

Practice Worksheet

5. Team Results _____

The team achieved the results expected for the meeting.

Successes:

Problems:

Potential solutions:

Audit Action Items

Problem Area:	Action Item:	Team Member Responsible:

Topic Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Effective Meeting Audit was conducted	<input type="checkbox"/> Questionnaire was distributed	<input type="checkbox"/> Yes
	<input type="checkbox"/> Questionnaire was completed by at least three-quarters team members present	<input type="checkbox"/> No
	<input type="checkbox"/> Discussion of meeting successes, problem areas, and strategies took place	
	<input type="checkbox"/> Questionnaires were collected	
2. Audit action items were documented	Action items include:	<input type="checkbox"/> Yes
	<input type="checkbox"/> Problem areas	<input type="checkbox"/> No
	<input type="checkbox"/> Action item	
	<input type="checkbox"/> Team members responsible for action items	

Final Practice

Instructions

- Perform this practice, referring to the topic step-action tables as needed.
 - Complete the Final Practice Worksheet, listing results that are realistic based on the information in the practice scenario.
 - Check your work.
 - Meet with your Performance Coach to review the results and decide what to do next.
 - Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
 - Communicating the time and location of the meeting to the participants in advance
 - Preparing and providing copies of a meeting agenda
 - Being prepared with all the necessary materials and resources
-

Practice Scenario

Work with a newly formed team in your school or organization to conduct an effective meeting by:

- Establishing effective meeting procedures
 - Documenting effective meeting notes
 - Conducting an effective meeting audit
-

Final Practice Worksheet

Review the meeting purpose. In the space below, write:

- The purpose of the meeting
- Input from team members

Conduct introductions. In the space below, describe the “ice breaker” or other activity used to introduce team members.

Final Practice Worksheet

Record attendance in the space below or on a separate sign-in sheet.

Select team members for the roles of recorder and timekeeper and list their names below.

Recorder	
Timekeeper	

Establish and approve the agenda. List the agenda items in the space below. Record meeting notes in the space provided.

Agenda Items	Notes
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Final Practice Worksheet

Review the central purpose of effective meetings. Write the function or objective in the space below.

Establish ground rules. List the ground rules in the space below.

Final Practice Worksheet

If this is an initial meeting, determine a consensus-building process for making decisions on agenda items. Summarize the process in the space below.

Discuss agenda items and determine outcomes. Add notes to the agenda items listed earlier.

Review meeting outcomes. List the outcomes below, including action items and preliminary items for the next meeting's agenda.

Final Practice Worksheet

Debrief the team process. In the meeting notes, list at least two aspects of the meeting that went well, and two areas that need improvement.

Distribute meeting notes. In the meeting notes, add a note confirming that the meeting notes were distributed.

Follow up on action items. List 3 to 5 follow up questions in the space below.

Final Practice Worksheet

Meeting Notes for (subject) _____ on (date) _____ for _____(team name)

Attendance:

Members Present

Members Absent

Agreements:

- 1.
- 2.
- 3.
- 4.
- 5.

Action Items	Person Responsible	Due Date
1.		
2.		
3.		
4.		
5.		

Tentative agenda topics for next meeting:

Final Practice Worksheet

Next meeting date and location:

Parking Lot Items	Person Responsible	Date Placed in Lot
1.		
2.		
3.		
4.		
5.		

Effective Meeting Audit for (team name) _____ on (date) _____

Rate each questionnaire item as follows:

Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
1	2	3	4	5

1. Team Focus _____

The team followed the agenda and stayed on track.

Successes:

Problems:

Potential solutions:

Final Practice Worksheet

2. Team Member Contribution _____

All members participated in discussions leading to decisions made during the meeting.

Successes:

Problems:

Potential solutions:

3. Team Member Effective Communications _____

Team members did not divert the team's attention away from a member recognized to speak with interruptions and side conversations.

Successes:

Problems:

Potential solutions:

Final Practice Worksheet

4. Role Implementation _____

The leader, recorder, and timekeeper implemented meeting procedures effectively.

Successes:

Problems:

Potential solutions:

5. Team Results _____

The team achieved the results expected for the meeting.

Successes:

Problems:

Potential solutions:

Final Practice Worksheet

Audit Action Items		
Problem Area:	Action Item:	Team Member Responsible:

Final Practice Performance Checklist

Select one: Performer’s self-assessment Performance Coach’s observations

Performer’s Name: _____

Performance Coach’s Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. Review meeting purpose	<input type="checkbox"/> Meeting purpose is defined	<input type="checkbox"/> Yes
	<input type="checkbox"/> Input from team members present	<input type="checkbox"/> No
2. Conduct introductions	<input type="checkbox"/> Description of “ice breaker” or other activity is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
3. Record attendance	<input type="checkbox"/> Attendees are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
4. Record meeting notes	<input type="checkbox"/> Meeting notes are present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
5. Establish and approve the agenda	<input type="checkbox"/> Agenda items are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
6. Review the central purpose of the team	<input type="checkbox"/> Team function or objective is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No

Final Practice

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
7. Establish ground rules	<input type="checkbox"/> Ground rules are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Determine a consensus-building process for making decisions on agenda items (Applicable for initial meeting only)	<input type="checkbox"/> Summary of consensus-building process is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Discuss agenda items and determine outcomes	<input type="checkbox"/> Discussion notes have been added to the agenda items	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Review meeting outcomes	<input type="checkbox"/> Outcomes are present and include action items and preliminary items for the next meeting's agenda	<input type="checkbox"/> Yes <input type="checkbox"/> No
11. Debrief the team process	<input type="checkbox"/> Meeting notes include two or more aspects of the meeting that went well <input type="checkbox"/> Meeting notes include two or more areas that need improvement	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Distribute meeting notes	<input type="checkbox"/> Meeting notes include confirmation that the notes were distributed	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Follow up on action items	<input type="checkbox"/> Action items include three or more follow up questions	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. Meeting notes title	<input type="checkbox"/> Subject, date, and team name are present	<input type="checkbox"/> Yes <input type="checkbox"/> No

Final Practice

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
15. Attendance list	<input type="checkbox"/> List includes team members who are present and those who are absent	<input type="checkbox"/> Yes <input type="checkbox"/> No
16. List of agreement items	<input type="checkbox"/> Consensus agreements are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
17. List of action items	Action items include: <ul style="list-style-type: none"> <input type="checkbox"/> Task <input type="checkbox"/> Individual(s) responsible for completing the task <input type="checkbox"/> Due date 	<input type="checkbox"/> Yes <input type="checkbox"/> No
18. List of agenda items	<input type="checkbox"/> Tentative agenda items for the next meeting are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
19. Specified next meeting date and location	<input type="checkbox"/> Date and location for the next meeting are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
20. List of any parking lot items	Parking lot items include: <ul style="list-style-type: none"> <input type="checkbox"/> Item <input type="checkbox"/> Individual(s) responsible for the item <input type="checkbox"/> Date placed in parking lot 	<input type="checkbox"/> Yes <input type="checkbox"/> No

Final Practice

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
21. Effective Meeting Audit was conducted	<input type="checkbox"/> Questionnaire was distributed <input type="checkbox"/> Questionnaire was completed by at least three-quarters of team members present <input type="checkbox"/> Discussion of meeting successes, problem areas, and solution strategies took place <input type="checkbox"/> Questionnaires were collected	<input type="checkbox"/> Yes <input type="checkbox"/> No
22. Audit action items were documented	Action items include: <input type="checkbox"/> Problem areas <input type="checkbox"/> Action item <input type="checkbox"/> Team members responsible for action items	<input type="checkbox"/> Yes <input type="checkbox"/> No

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i>	Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i>	Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i>	Distinguished Could be Used as a Model to Teach Others
Eligible for Portfolio			

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

Turn the page to provide additional written feedback (required).

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Final Assessment

When Can I Take the Final Assessment?

Complete the Final Assessment when you are able to sufficiently execute the module's performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

When Can I Add the Final Assessment to My Portfolio?

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

Yes	No
<p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> • Final Assessment Performance Checklist • Final Assessment Feedback Form • Module Progress Tracker page • Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc. 	<p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> • Obtain performance feedback from your Performance Coach • Review relevant topics in the module • Repeat Topic Practices and/or the Final Practice • Pursue additional learning, training and experience

Final Assessment Instructions

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
4. Review the following with your Performance Coach:
 - Task-related criteria on the Final Assessment Performance Checklist
 - Cross-cutting leadership skills on the Performance Feedback Form
 - Final Assessment Scenario (on the next page)
5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
6. Perform the Final Assessment as follows:
 - In a real school or district setting
 - With a team of teachers, staff, or other leaders as appropriate
 - Observed by your Performance Coach
7. Retain artifacts from your performance (documents, slides, etc.)
8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.

Final Assessment Scenario

As the assistant principal in the school, you have been given the responsibility of conducting the monthly grade level and department chair meetings. Work with this newly formed team in your school or organization to:

- Establish effective meeting procedures
 - Document examples of effective meeting notes
 - Conduct an effective meeting audit
-

Final Assessment Performance Checklist

Select one: Performer’s self-assessment Performance Coach’s observations

Performer’s Name: _____

Performance Coach’s Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

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6. Review the central purpose of the team	<input type="checkbox"/> Team function or objective is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

Evidence	Criteria	Proficient? Give Feedback.
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Final Assessment

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

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Final Assessment

Conducting Effective Meetings to Improve Student Achievement & Organizational Effectiveness

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Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

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Eligible for Portfolio

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3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

Turn the page to provide additional written feedback (required).

Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Recommended Reading and Resources

Conzemius, A. and O'Neill, J. (2002). *The Handbook for SMART School Teams*. Bloomington, IN: National Educational Service.

Schmoker, M. (1999) *Results: The Key to Continuous School Improvement*. Alexandria, VA: The Association for Supervision and Curriculum Development.

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