

**ESTABLISH A CALENDAR OF TRIANGLE MEETINGS**

- ESTABLISH A YEAR-LONG CALENDAR OF TRIANGLE MEETINGS BETWEEN ADMINISTRATORS, TEAM LEAD(S), AND 9TH GRADE SUCCESS COACH.

**TRIANGLE MEETING CHECKLIST & AGENDA****Initial Meeting Set-Up Checklist**

Based on “Developing Your Upward Management Plan” and “Upward Management Plan Checklist”  
Available [here](#).

ESTABLISH COMMUNICATION PROTOCOLS	MEETING SCHEDULE
<p>► Preferred method of communication for administrator between meetings is:</p> <p>_____</p> <p>_____</p> <p>► Should administrator get CC'd on communications with 9th grade team lead?</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p><input type="checkbox"/> Sometimes, if: _____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>► Scheduled monthly meetings with the administrator liaison, 9th grade team lead(s), and CHSS coach will occur on:</p> <p>_____</p> <p>(e.g. second Wednesdays of each month from 7:30-8:30 am)</p> <p>► Calendar invite sent:</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Person who will send invites:</p> <p>_____</p> <p>By [date]:</p> <p>_____</p>

**Triangle Meeting Agenda****CHSS STANDARD STANDING AGENDA ITEMS ARE:**

- |   |  |
|---|--|
| <b>1</b> Update on team successes         | <b>3</b> Items needing administrator input/direction             |
| <b>2</b> Update on obstacles toward goals | <b>4</b> Summary of decisions, next steps, items for next agenda |

**QUESTIONS OR SPECIAL REQUESTS REGARDING COMMUNICATION BETWEEN MEETINGS, AGENDA, OR SCHEDULE:**

Team Lead	CHSS Coach:	Administrator:
_____	_____	_____

## Triangle Meeting Responsibilities

### PRE-MEETING PREPARATION:

TEAM LEAD	CHSS COACH	ADMINISTRATOR LIAISON
<ul style="list-style-type: none"> <li>➤ Send the meeting agenda to administrator for approval at least 48 hours prior to the team meeting</li> <li>➤ Make sure items requiring approval are brought before the principal or administrator liaison in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Meet with team lead to develop meeting agenda, and assist in preparing reports on success and obstacles</li> <li>➤ Work on assigned follow-up items from previous agenda</li> </ul>	<ul style="list-style-type: none"> <li>➤ Review agenda in advance of meeting</li> <li>➤ Acknowledge agenda or recommend changes via email</li> <li>➤ Honor meeting time</li> <li>➤ Work your assigned follow-up items from previous meeting</li> </ul>

### DURING THE MEETING:

TEAM LEAD	CHSS COACH	ADMINISTRATOR
<ul style="list-style-type: none"> <li>➤ Lead the meeting</li> <li>➤ Provide reports and recommendations</li> <li>➤ Report back on previous action items assigned to them</li> </ul>	<ul style="list-style-type: none"> <li>➤ Serve as timekeeper/minute taker during the meeting</li> <li>➤ Contribute observations and recommendations during the meeting</li> <li>➤ Report back on previous action items assigned to them</li> </ul>	<ul style="list-style-type: none"> <li>➤ Contribute observations and recommendations during the meeting</li> <li>➤ Provide direction, permission to proceed, and/or commitment to follow up</li> <li>➤ Report back on previous action items assigned to them</li> </ul>

### POST-MEETING:

SITE LEAD	CHSS COACH	ADMINISTRATOR
Provide meeting minutes with summary of next steps to administrator within 48 hours after the meeting	Assist team lead with reviewing meeting minutes, action items including owner and due date to send to administrator	Acknowledge via email receipt of meeting minutes and accuracy of minutes including action items, decisions and next steps within 24 hours of receipt

## Triangle Meeting Sample Agenda

MEETING DATE:

9TH GRADE ON-TRACK GOALS	CURRENT RESULTS

**1 Update on team successes** *(Completed before the meeting):*

- a)
- b)
- c)

**2A Update on obstacles toward goals or See the System** *(Completed before the meeting)*

- a)
- b)
- c)

**2B See the System: Systemic practices/barrier(s) to student success we see emerging**  
*(To be completed every 6-8 weeks; completed before the meeting)*  
**Consider scheduling time to complete a fishbone diagram.**

- a)
- b)
- c)

**3 Items needing administrator direction/approval**

ITEM	DECISION

**4 Summary of decisions, next steps, items for next agenda**

ACTION	PERSON RESPONSIBLE	BY WHEN?

## CSAW Feedback Template\*

\*Available from The Management Center [www.managementcenter.org](http://www.managementcenter.org)

You can use CSAW with your manager, with peers or collaborators.



**CONNECT**  
OVER A  
SHARED VALUE



**SHARE**  
A SPECIFIC  
OBSERVATION



**ASK**  
QUESTIONS



**WRAP UP**  
WITH NEXT STEPS

### Steps



**CONNECT**  
OVER A  
SHARED VALUE  
OR GOAL

Lay the foundation by building or reinforcing a sense of connection. You can do this by talking about a shared value, goal, or experience. This is a reminder that you're on the same team and it can also ground the conversation in a broader cause or purpose. Since each person's relationship to giving (and receiving) feedback is greatly shaped by culture and community, this can help you engage better across lines of difference.

#### Examples:

- ▶ "I can see how hard you've been working on X..."
- ▶ "I know it's important to both of us that..."
- ▶ "I know we share X value...; I appreciate..."



**SHARE**  
A SPECIFIC  
OBSERVATION OR  
CONCRETE EXAMPLE

As objectively as possible, share what you observed. Then, share why it matters to you by being explicit about the impact on you and/or the work. If this behavior is part of a pattern, share that as well. The main goal with this step is to get your perspective out into the open. However, make sure to check your assumptions! State what you think happened, not *why* you think it happened. Share specific observations about behaviors and outcomes and their impact on you without passing judgment on the other person's motives, mindset, or character. Lastly, keep it brief. This isn't a trial, and you're not a prosecutor making your opening statement. The more space you leave to seek the other person's perspective, the better your feedback will be received.

#### Examples:

- ▶ "I noticed that the meeting didn't start on time, and we didn't get to all the agenda items. Can we talk about what happened? With so many stakeholders present, it's important that we appear organized and reliable."
- ▶ "For the last few trainings, you've made last-minute requests of support from our admin team. Can we discuss that? Admin staff have a lot on their plate, and last minute requests impact their ability to get their work done well."



### **ASK QUESTIONS TO BETTER UNDERSTAND THEIR PERSPECTIVE**

It takes two to CSAW. The conversation isn't done once you've said your piece. Get curious and make space for the other person to share their perspective. Ask questions to help you both gain a better understanding of what's going on. The key here is to listen with an open mind, without assuming you already know the answers to the questions you're asking.

#### **Examples to:**

##### **Check for alignment on your assessment:**

- ▶ How do you think that went?
- ▶ What's your take on what's happening?

##### **Unearth causes:**

- ▶ Why do you think this happened?
- ▶ Why do you think this keeps happening?
- ▶ Are there things I'm missing?

##### **Surface solutions:**

- ▶ Do you have thoughts on how to move forward?
- ▶ Is there a better system or process we could try?



### **WRAP UP WITH NEXT STEPS**

Don't leave the conversation without making sure that you're on the same page about expectations and have a plan for moving forward. Once you've both shared your perspectives, you should agree on a set of next steps. Then, schedule a time to revisit the conversation so that you can (hopefully!) celebrate any progress made.

#### **Examples:**

- ▶ "Just to make sure we're on the same page, can you do a quick repeat-back on how we're moving forward?"
- ▶ "Let's revisit this at our check-in next month."