

# Leader's Summary Form

Your Name:

Type of Meeting:

Names of Meeting Members:

Date:

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**Instructions:** Use this form during the administrative wrap-up of your meeting to summarize and document information. Distribute copies as appropriate.

1. How effective was this meeting? What contributed to or detracted from the effectiveness?

2. Summarize the feedback from your Process Observer about how your meeting went.

3. Summarize team feedback about how you did as meeting leader.

4. How well did your group meet these three goals? Why so?

Learning goals - consciously picking up and applying new stuff (skills/knowledge/attitudes)?

Process goals - achieving an optimal working relationship with each other?

Results goals - producing specific work outcomes?



# Coach's Summary Form

**Leader's Name:** \_\_\_\_\_

**Type of Meeting:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Instructions:** As an observer/coach, you can use this form to help you observe and record information throughout the meeting. During the administrative wrap-up of the meeting you can provide feedback based on the notes you take.

1. What were the two or three competencies that the leader wanted to work on? (Ask the leader before the meeting begins.)
  - a)
  - b)
  - c)
  
2. What do you observe about the leader's comfort and skill in:
  3. a) delegating roles
  - b)
  - c) working with others
  - d)
  - e) fulfilling the role as leader
  - f)
  - g) using the tool she or he selected
  
4. How conscious is each team member about her or his own learning? What are team members doing to show this?
  
  
  
  
  
  
  
  
  
  
5. Process goals – how well did the team achieve an optimal working relationship with each other?
  
  
  
  
  
  
  
  
  
  
6. Results goals – how well did the team produce specific work outcomes?
  
  
  
  
  
  
  
  
  
  
7. General observations/comments about the leader and/or group.



## Learning Observer Form

**Instructions:** Review your role description. Whereas the process observer watches and reports on group behavior, your job is to watch and report on the **learning** that is occurring for you, the meeting leader and the other participants. What new knowledge, skills, attitudes/emotions and awareness are you acquiring?

1. How is learning occurring in the meeting? What is specifically happening that is teaching you something? (or) What is getting in the way of learning occurring here?

2. What does the work group know at the end of the meeting that it didn't know at the beginning?

Knowledge -

Skills -

Attitudes/Emotions -

Other -

3. What have we learned that would be of value to others? How best could we pass this information on to them?

<b>PROCESS OBSERVER FORM</b>	<b>Meeting Participants' Names</b>								
<b>Meeting Type:</b>									
<b>Date:</b>									
<b>TASKS - how well the group is accomplishing its task goals/work as evidenced by:</b>									
<b>Contributing:</b> Contributes information, opinions, ideas									
<b>Seeking:</b> Seeks information and ideas of others									
<b>Elaborating:</b> Gives examples, clears up confusion									
<b>Summarizing:</b> Organizes ideas, restates questions									
<b>Testing Consensus:</b> Verifies opinions, checks for agreement									
<b>Other:</b> (As desired by Leader or other meeting participants.)									
<b>RELATIONSHIPS - how well the group is working together as evidenced by:</b>									
<b>Gate Keeping:</b> Help others participate and stay on track									
<b>Encouraging:</b> Friendly, warm, responsive, non-verbals									
<b>Harmonizing:</b> Reduces tension among the group									
<b>Self-Diagnosing:</b> Shares feelings, has others express theirs									
<b>Other:</b> (As desired by Leader or other meeting participants.) <b>Listening</b>									

## Parking Lot Form

Preferably use a large visible area to park items, such as a flip chart or whiteboard or overhead projected image. If this is not possible, use this sheet and keep people posted verbally during the meeting as to what is on the list.

List the question, idea, need, concern, request or any other item that needs to be parked. Be sure to record this, as closely as possible, with the person's actual words. You can also park items yourself. If the item did not get addressed sufficiently during the meeting and is still "alive", you will need to present them to the group **before the meeting ends**, to determine if and how to handle them – (as an extension to the meeting, as an assignment to someone to handle after the meeting, as an item for a subsequent meeting or something else).