

Welcome to

How to Lead an Effective & Engaging Team Huddle

THE TRAINING WILL BEGIN SHORTLY! WHILE YOU'RE WAITING...

 **Icebreaker Question**
(answer in the chat)

What's your "hype up" song?



Survey & Certificate of Completion

Available following the training.

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Before We Begin...

DURING



Access your Note-taking Slides!
The link can be found
in the chat.



Review interactive features for
today's session. Locate the
controls on the toolbar at the
bottom of your screen.



This presentation is
being recorded.



External AI assistants are not
allowed in CalTrin trainings due
to California privacy laws.

AFTER



Complete the survey at the end
of this webinar to receive your
Certificate of Attendance.



A follow-up email will be sent to
all participants within
two days.

Hi, We're CalTrin!

Who we are

- The California Training Institute
- Funded by the State of California, Dept. of Social Services, Office of Child Abuse Prevention (OCAP) to support child abuse prevention through professional development and extended learning opportunities.
- Designed for staff of family strengthening and child abuse prevention organizations in California, including FRCs, CAPCs, CBOs, and other child and family serving systems.

What we offer

- Live webinars & small group training
- Virtual, self-paced courses
- Job aids & other resources



UPCOMING TRAININGS

mark your calendars!

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April 16, 2026



April 28, 2026



May 28, 2026



How to Lead an Effective & Engaging Team Huddle

Presented by CalTrin



Jessica Mattly, MBA

CalTrin Training
Coordinator & Facilitator

- Worked for First 5 San Diego in 2009
- Training & Leadership Development for global corporation
- Training Certifications
 - Bringing the Protective Factors Framework to Life in Your Work (CTF Alliance)
 - Standards of Quality for Family Strengthening and Support (NFSN)





LET'S LEARN ABOUT YOU!



AGENDA

- Review the **benefits** of conducting team huddles
- Review the **differences** between a team meeting and a team huddle
- Explore **tips and strategies** for developing an effective and engaging team huddle agenda
- Develop a **plan** for facilitating your next team huddle





Team Huddle Overview



PURPOSE



Alignment

Focus efforts toward common goals and objectives.

Information Sharing

Facilitate the timely and efficient exchange of information.

Collaboration & Problem-Solving

Create an opportunity to collaborate and problem-solve together.

Building Relationships

Foster a sense of community and connection.

Accountability

Promote accountability by providing a platform to report progress, discuss obstacles, and receive feedback.

Continuous Improvements

Create an opportunity for reflection and continuous improvement.

BENEFITS

**Time
Efficiency**

**Increased
Engagement**

**Focused
Topics**

**Enhanced
Productivity**

**Shortened
Response
Times**

**Reduced
Meeting
Fatigue**



Team Huddle vs. Team Meeting







Team Huddle

- Shorter in duration (15 minutes or less)
- Conducted more frequently
- Designed for quick updates, coordination, and alignment
- Smaller group of core team members
- Highly focused agenda
- Swift sharing
- Promote immediate action, accountability, and problem resolution
- Encourage brief discussions, quick decision-making, and rapid response

VS.



Team Meeting

- Longer in duration (30+ minutes to several hours)
- Scheduled less frequently - weekly or monthly
- Focus on comprehensive discussions, presentations, and decision-making
- Involvement of a larger group of team members
- Agenda may cover multiple topics or projects
- Can involve detailed reporting, analysis, and brainstorming sessions
- Opportunities for in-depth collaboration, problem-solving, and strategic planning



Tips and Strategies for Developing an Effective and Engaging Team Huddle Agenda





HUDDLE PREPARATION

- Determine the outcomes or goals you want to achieve during the huddle. For example:
 - Share project updates
 - Address urgent issues
 - Make time-sensitive decisions
 - Collaborate on problem-solving
- Prepare and/or distribute agenda or materials in advance
- Allocate time for each agenda item:
 - Estimate how much time should be dedicated to each topic to ensure the huddle stays on schedule.

HUDDLE STRUCTURE

- Establish time limits and enforce discipline
- Set ground rules for effective communication
- Encourage concise and focused discussion
- Delegate responsibilities to minimize distractions and maximize huddle efficiency



HUDDLE ROLES

- Facilitator
 - Create agenda, manage progress
- Note Taker
 - Record key decisions, action items, etc.
- Timekeeper
 - Ensures allocated times are respected
- Parking Attendant
 - Identifies topics/conversations that need to be addressed outside of the huddle
- Action Advocate
 - Recaps any decisions to ensure team is clear about who is responsible for next steps





HUDDLE CHALLENGES

- Resistance to change
 - Clearly communicate Team Huddle benefits and structure
- Manage distractions
 - Set ground rules and delegate roles
- Time constraints
 - Allocate time for prioritized topics and assign remaining topics to future scheduled meeting dates
- Foster inclusion
 - Rotate responsibilities and include fun activities
- Utilize technology
 - Leverage tools that allow virtual participants to share and collaborate

Huddle Template

INFORM Overview of logistics for the team (what's happening, who is needed, etc.)

Topic	Details
Volume/Needs	
Today's Flow	
Shift Priorities/ Areas of Focus	
Announcements/ Events	

EDUCATE Build knowledge, reinforce values, or offer mini learning moments.

Topic	Details
Resources & Services	
Staff Development	
Cross-Team Collaboration	

INSPIRE Energize and connect the team with recognition, gratitude, and a human moment.

Topic	Details
Welcome	
Recognition	
Gratitude/Shout-out	
Encouragement	



Example Huddle Template

INFORM Overview of logistics for the team (what's happening, who is needed, etc.)

Topic	Details
Volume/Needs	<i>Snapshot of how many families are coming in today and any urgent needs.</i> <i>24 families are visiting, 8 have urgent housing needs</i>
Today's Flow	<i>Any scheduled programming, major appointments, or important visitors.</i> <i>Parenting Workshop at 10:30am in Room A.</i>
Shift Priorities/ Areas of Focus	<i>Reminders about key priorities to remember.</i> <i>Mention & remind all walk-ins about the Backpack Drive next Tuesday.</i>
Announcements/ Events	<i>Program or staffing updates and upcoming events.</i> <i>Sign up for CalTrin's next Protective Factor of the Month</i>

EDUCATE Build knowledge, reinforce values, or offer mini learning moments.

Topic	Details
Resources & Services	<i>Highlight something helpful (a program flyer, form, policy update, new community partner, etc.).</i> <i>New question on the Intake Form, updated hours of service from a partner.</i>
Staff Development	<i>A short reminder on soft skills or best practices.</i> <i>Referral criteria, set out-of-office notices</i>
Cross-Team Collaboration	<i>Ways to strengthen teamwork across roles and shifts.</i> <i>Use the whiteboard in our shared space to note lunch times.</i>

INSPIRE Energize and connect the team with recognition, gratitude, and a human moment.

Topic	Details
Welcome	<i>Introduce new team members, interns, volunteers.</i>
Recognition	<i>Celebrate someone for a great moment, effort, or achievement.</i>
Gratitude/Shout-out	<i>Thank someone for going the extra mile. Open for peer feedback.</i>
Encouragement	<i>Share a quote, reflection, or a client testimonial.</i>





Team Huddle Planning



PLANNING YOUR NEXT HUDDLE

- 1 **Welcome and Introduction (1 min)**
- 2 **Team Updates (5 mins)**
- 3 **Priority Discussions (5 mins)**
- 4 **Action Items & Accountability (3 mins)**
- 5 **Wrap-up and Next Steps (1 min)**





Q & A



Thanks for joining us!

WHAT'S NEXT?

- Survey and certificate in the chat now
- Follow-up email with resources within two days
- Watch your inbox for the next issue of *CalTrin Connect*



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