

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.

Connect With Us!

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## Before We Begin...

DURING		AFTER
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.	Complete the survey at the end of this webinar to receive your Certificate of Attendance.
This presentation is being recorded.	External AI assistants are not allowed in CalTrin trainings due to California privacy laws.	A follow-up email will be sent to all participants within two days.

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## 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

This training was made possible with funding from the California Department of Social Services, Office of Child Abuse Prevention. Any opinions, findings, conclusions, and/or recommendations expressed are those of the CIBIC, CalTrin and do not necessarily reflect the views of the California Department of Social Services.

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# UPCOMING TRAININGS

mark your calendars!

Visit [caltrin.org](http://caltrin.org) to view the full training calendar and self-paced online training options





**Concrete Support**

April 16, 2026



**Building Inclusive Leadership: Embracing Diversity, Equity, & Inclusion**

April 28, 2026



**Talent Conversations**

May 28, 2026

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## How to Lead an Effective & Engaging Team Huddle

Presented by CalTrin



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## Speaker SPOTLIGHT



**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)




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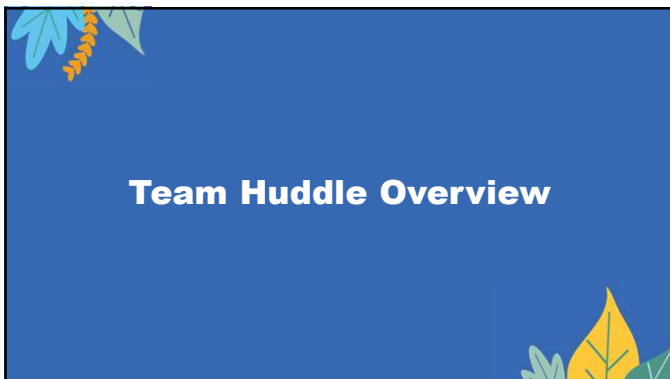
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**PURPOSE**



*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.

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**BENEFITS**

Time Efficiency	Increased Engagement	Focused Topics
Enhanced Productivity	Shortened Response Times	Reduced Meeting Fatigue

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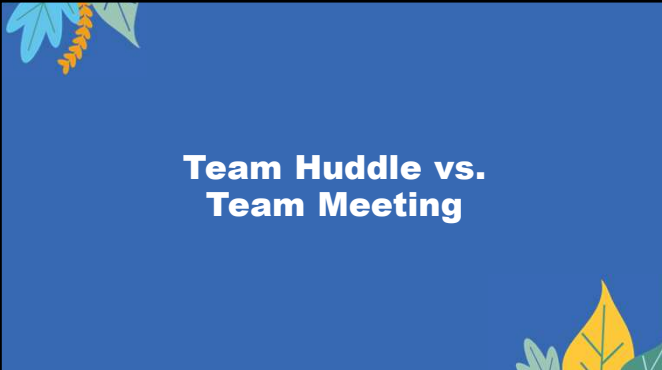
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**Team Huddle vs. Team Meeting**



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 <p><b>Team Huddle</b></p> <ul style="list-style-type: none"> <li>• Shorter in duration (15 minutes or less)</li> <li>• Conducted more frequently</li> <li>• Designed for quick updates, coordination, and alignment</li> <li>• Smaller group of core team members</li> <li>• Highly focused agenda</li> <li>• Swift sharing</li> <li>• Promote immediate action, accountability, and problem resolution</li> <li>• Encourage brief discussions, quick decision-making, and rapid response</li> </ul>	<p>vs.</p>	 <p><b>Team Meeting</b></p> <ul style="list-style-type: none"> <li>• Longer in duration (30+ minutes to several hours)</li> <li>• Scheduled less frequently - weekly or monthly</li> <li>• Focus on comprehensive discussions, presentations, and decision-making</li> <li>• Involvement of a larger group of team members</li> <li>• Agenda may cover multiple topics or projects</li> <li>• Can involve detailed reporting, analysis, and brainstorming sessions</li> <li>• Opportunities for in-depth collaboration, problem-solving, and strategic planning</li> </ul>
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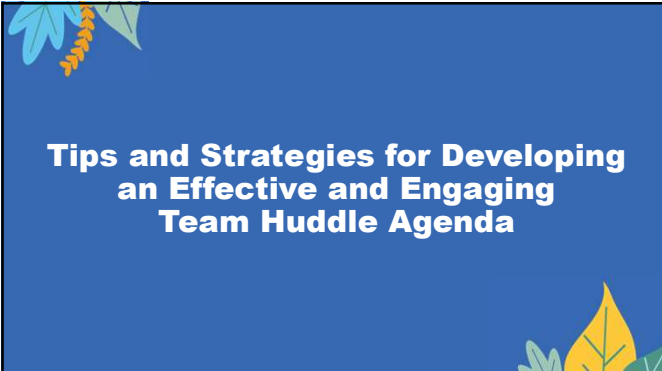
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## Tips and Strategies for Developing an Effective and Engaging Team Huddle Agenda

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### 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.

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### 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

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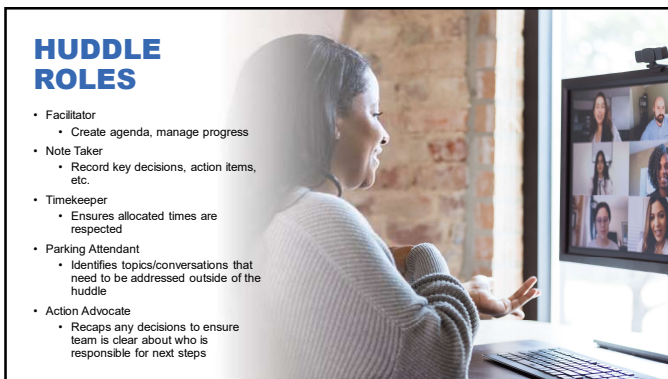
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### HUDDLE ROLES

- 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

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## 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

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Huddle Template

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


Topic	Details
Volume/Needs	
Today's Five	
Staff Incentive/ Areas of Focus	
Announcements/ Events	

**EDUCATE** Build knowledge, reinforce values, or offer mix 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	



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Example Huddle Template

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


Topic	Details
Volume/Needs	Snapshot of how many families are coming in today and any urgent needs.
Today's Five	As families are visiting, if there is any special booking needs.
Staff Incentive/ Areas of Focus	Reinforce allocation of staff time to focus & Reminders about key policies to remember.
Announcements/ Events	Activities & remind staff to walk into about the Donorship Drive next Tuesday. Program or staffing updates and sporting events. Sign up for Crafters' next Production Party of the Month.

**EDUCATE** Build knowledge, reinforce values, or offer mix learning moments.

Topic	Details
Resources & Services	Programs something helpful re program (i.e., policy update, new community partner, etc.)
Staff Development	How to question on the raised floor, updated hours of service from a partner.
Cross-Team Collaboration	A short reminder on soft skills or best practices. Self-reflection, and self-improvement.

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

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



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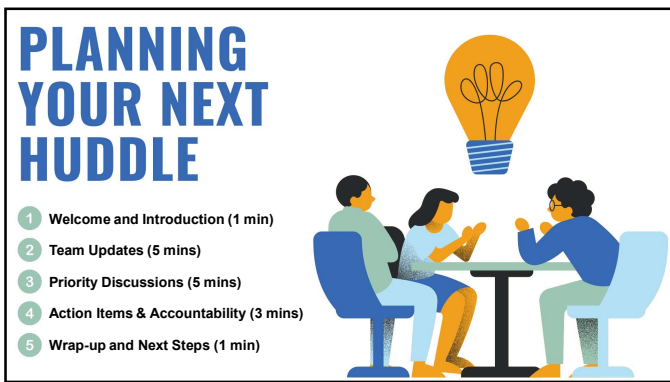
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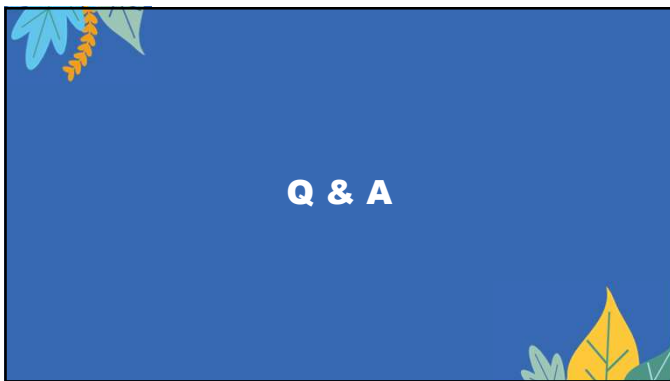
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Thanks for joining us!

### 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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