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The Impact of Social-Emotional Team Huddles on Educational Leaders' Wellbeing: An Improvement Science Study

Jennifer Lambie Patterson

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THE IMPACT OF SOCIAL-EMOTIONAL FOCUSED TEAM HUDDLES
ON EDUCATIONAL LEADERS' WELL-BEING:
AN IMPROVEMENT SCIENCE STUDY

by

Jennifer Lambie Patterson

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A Dissertation Presented to the Faculty of the
Doctor of Educational Leadership Department
in partial fulfillment for the degree of
Doctor of Education

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THE IMPACT OF SOCIAL-EMOTIONAL FOCUSED TEAM HUDDLES ON EDUCATIONAL LEADERS' WELLBEING:
AN IMPROVEMENT SCIENCE STUDY, a Doctoral research project prepared by JENNIFER LAMBIE
PATTERSON in partial fulfillment of the requirements for the Doctor of Education degree in
Educational Leadership.

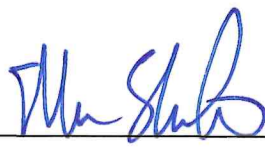
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ABSTRACT

Teachers and administrators have been leaving the education industry with nearly half of educators hired living within their first five years in the classroom. Burnout and stress contribute most significantly to the high attrition rates. One research-based strategy that has been deemed impactful is creating a culture of wellness and establishing trusting relationships in the workplace. These relationships may be achieved through engagement structures, inclusive environments, and strong leadership attributes that foster one-to-one connections. The method researched in this improvement science in practice methodology is the implementation of bi-monthly team huddles with a department of education administrators. Included in each team huddle were social-emotional wellbeing activities that elicited engagement with one another, ample opportunities for individual voices to be brought into the learning space, and a understanding of personal strengths and how they attribute to the overall team. The results showed that well-being activities did yield both higher pleasantness and energy in team huddles conducted and overall identification of self-care strategies in the workplace were improved from intentional time spent cultivating the learning. Future implications would encourage facilitators to seek additional qualitative data to find out more detailed information attributed to specific facets of the team huddle that deemed positive or negative for the participant.

DEDICATION

I dedicate this dissertation work to the late Dr. Steven E. Lewis whom I affectionally refer to as “Steveo” and unofficially, my Godfather. The entire breadth of Steve’s life was dedicated to living a lifetime following the Lord and filled with joy and goodness within every second he was here on Earth. He was my very first employer and taught me the importance of relationship building as it is the foundation of any successful company. He was always one of my biggest advocates through life and I know would be so proud of the research presented.

I also dedicate this research to my partner and husband, Jason “JP” Patterson who has been my earthly cheerleader throughout this entire process. JP has created a space for me to truly do what I love and encouraged me every step of the way.

I dedicate this work and accomplishment to my three children, Joseph, Sofia, and Zella Biagio. They have been by my side from the early days of my college education, throughout several thesis research over the years, and patiently in classrooms during the days when I was a teacher. The research will state that to do this great work, you need a strong family presence, and it is because of these three that I could truly work in an occupation so fulfilling. I hope this encourages each of them to chase their dreams no matter how long it takes to get there!

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I would like to thank my mentor and former leader, Dr. Martin Frolli who has spent countless hours with his encouragement of the doctoral process and with his support of me as an administrator making a way for well-being to hold a space in a professional work setting.

I would like to acknowledge and thank the many educators that allowed me to conduct my research. Their excitement in participation and willingness to share feedback along the way as been instrumental in this learning.

Finally, I would like to thank my parents, Richard and Lissa Lambie, who were my very first teachers and have dedicated nearly eighty years combined to the public education industry. They embody the transformational leadership that is vital to lead dynamic classrooms and school campuses.

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Chapter 1: Strategize

The COVID-19 global pandemic caused people to have countless struggles due to school closures; they were forced to adjust how they functioned. The aftermath has now been labeled learning loss (Donnelly & Patrinos, 2022). Educators have been leaving the industry at high rates, and United Nations Educational, Scientific and Cultural Organization Sustainable Development estimated that to reach global goals of instruction, the world will need to recruit 69 million new teachers by 2030 (Madigan & Kim, 2021), a statistic that is unsettling given this problem existed long before the pandemic; it is not unique to the education arena as nearly half of teachers hired leave in their first 5 years in the classroom. Some institutions have researched their own systems to determine the root cause of such high attrition rates; however, accurate feedback and input from teachers who leave needs to be explained clearly. The strategy used for gathering feedback and input is use of empathy interviews. *Empathy interviews* are an informal qualitative interview structure in which the interviewer seeks to gain perspective and understanding of another person (Nelsestuen & Smith, 2020). Lack of empathy interviews with outgoing educators may be due to opportunity costs associated with tracking down teachers who have resigned or retired (Madigan & Kim, 2021).

Burnout and stress have contributed most significantly to high attrition rates (Brasfield et al., 2019; Squires, 2019). These feelings can be mitigated by working in positive school climates, holding role stability, having peer mentorship, and other activities that stem from establishing effective relationships in the workplace (Squires et al., 2022). Educational leaders can solve this existing attrition by looking at relational outcomes with a more proactive stance.

For this dissertation, I studied the potential impacts of strategic time spent with educators focused on relationship building, self-understanding, and wellness capacity building in the

workplace. I researched the improvement cycle that addressed a similar existing problem with educational leaders, and I codeveloped a theory for improvement with the educational department, which led to conducting a 3-month improvement cycle using team huddles. The team huddle change idea has an opportunity to be scaled up in the future and used with other departments in the greater organization. In this study, I theorized increasing adult connections through team huddles would increase trusting relationships and result in a positive work environment in which team members would experience a decrease in stress and burnout.

Research Aim

A department of educational administrative-level leaders expressed they were struggling to feel connected to each other. Based on previous annual survey data, the department scored significantly high in “avoiding hard conversations” and low in “operationalizing organizational values.” Thus, they desired better professional relationships with one another. The department explored continuous improvement cycles in its systems and structures and worked with one another to build trusting relationships to help promote mental health and well-being with research-based social-emotional learning (SEL) strategies in its work environments’ current agendas and frameworks.

There were four primary drivers for this theory of improvement. I created this theory by combining prior work the educational department had applied to its system and my research of social emotional well-being in the workplace. The first driver was to build trusted relationships in the workplace. Establishing trusted relationships could be done through (a) providing secondary drivers of team building opportunities with warm-ups and intentional spaces for physical and verbal interactions, (b) working in an inclusive environment that includes equitable voice for all participants through strategic activities, (c) participating in learning that includes

engagement structures, and (d) establishing those relationships on staff well-being efforts. The second primary driver of SEL integration was to increase the number of staff who felt connected to their peers through secondary drivers of team building and inclusive environments, and through the implementation of mindfulness exercises.

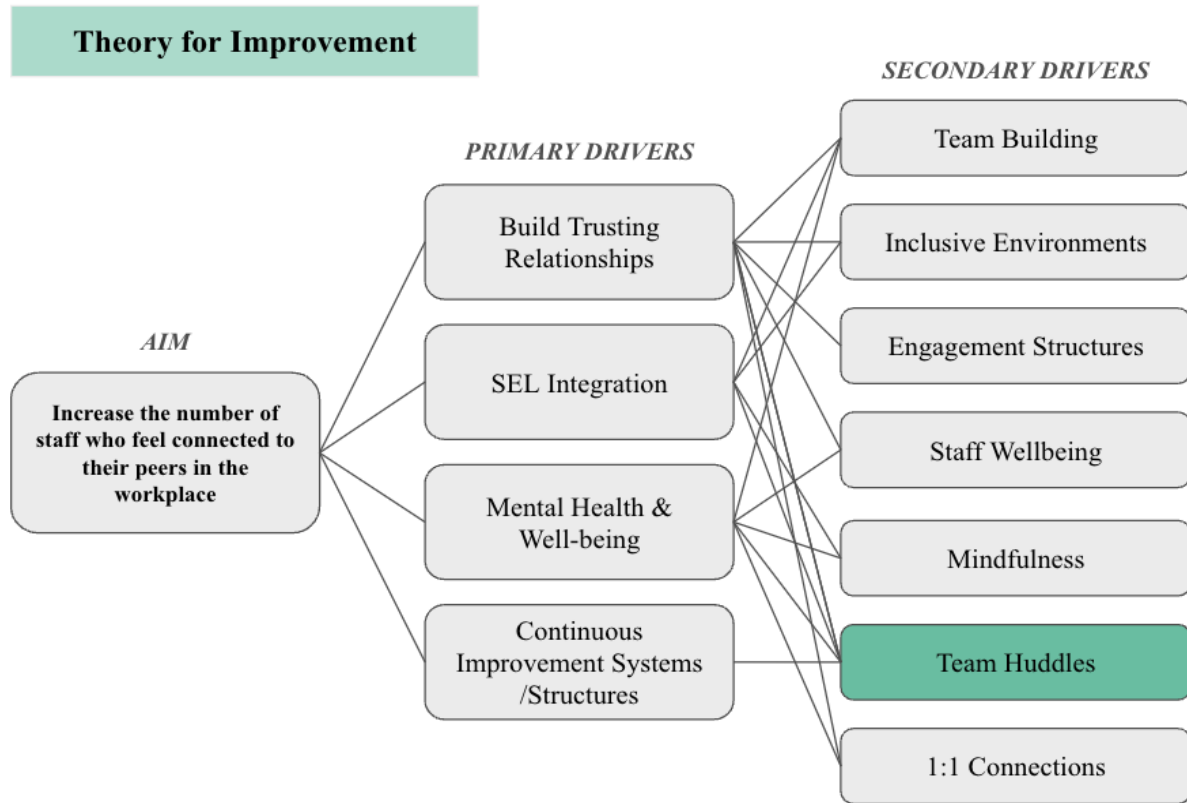
The third driver of the improvement theory was a focus on mental health and well-being, which included secondary drivers of team building activities, staff well-being, mindfulness tasks, and intentional one-to-one connections with workplace peers. The fourth and final driver of improving connectedness in the workplace was providing technical resources, such as using continuous improvement systems and structures, which included one secondary driver of team huddles.

All four of these drivers can be independently activated on their own. One driver represents an action and interaction between individuals. Another driver represents a researched-based curriculum to be implemented. Another driver represents a connected, physical health component. The last driver represents an organized method and structure in which to facilitate these changes. When all four drivers are used in combination, I theorized they directly result in an increased number of staff who feel connected to their peers in the workplace. When intentionally brought together, these four areas will work together to increase improvement of the overarching goal which is relational connectedness in the workplace.

I used a model that consisted of six core principles of continuous improvement developed by the Carnegie Foundation for the Advancement of Teaching (2016), which are: (a) making the work problem specific, (b) addressing variation, (c) seeing the system that produces the outcomes, (d) embedding appropriate measurements, (e) conducting disciplined inquiry, and (f) using the collaboration of other networks for improvement to hone increased desired results

(Bryk et al., 2017). The educational department used the structures of *Meeting Wise* (Boudett & City, 2018) and strategies from the *National Equity Project* (NEP, 2020). The only metric that was used prior to this study was its annual *Dare to Lead* (B. Brown, 2021) self-assessment, which was reviewed twice prior to this study.

In Figure 1, I have designed a theory for improvement based on the main aim of increasing the number of staff who feel connected to their peers in the workplace. The theory I proposed includes the primary drivers where this aim can be addressed by (a) establishing trusting relationships, (b) SEL integration, (c) mental health and well-being, and (d) utilizing continuous improvement systems and structures. This theory includes seven potential secondary drivers that signify how and what areas may be addressed in the greater primary drivers. These secondary drivers include (a) team building activities, (b) creating inclusive environments, (c) including engagement structures, (d) thinking about staff wellbeing, (e) mindfulness practices, (f) team huddles, and (g) making one-to-one connections with staff.

Figure 1*Theory for Improvement***The Problem of Practice**

Educators have been leaving the industry at high rates. Before the COVID-19 global pandemic, 8% of teachers were leaving the profession; there has been fear this number would significantly increase post pandemic. Will (2021b) wrote these findings based on newly released data from the RAND Corporation, which surveyed 1,000 former public school teachers in December 2020 amid the COVID-19 global pandemic. Most teachers (55%) quit before the pandemic, and the remaining (45%) left the teaching profession after March 2020 by way of resignation, early retirement, or an unpaid leave of absence. Sixty-four percent of these teachers cited the need for a higher salary; however, stress was the most significant reason for teachers

leaving; the overall theme was the pay did not warrant the stress and responsibilities laid on them. Childcare was a topic that came up as an additional barrier brought on by the pandemic. The COVID-19 vaccine played a part in some of the teacher attrition. Prior to the pandemic, 8% of teachers left the education profession each year. There was a great concern that teacher attrition would increase as there were so many uncertainties ahead (Will, 2021b).

Researchers have not been consistent with the root cause of attrition rates. For example, Loewus (2021) and Stafford (2007) found high levels of perceived stress and burnout and low perception of perceived compensation-were causes for attrition rates. Alternatively, Whaland (2020) found relationships and social factors positively impacted attrition rates and supported the environment in which educators wished to stay. In a study of attrition rates in rural areas, Chuong (2008) collected qualitative data from district exit interviews that showed 20% of teachers left the profession for family reasons. In contrast to what administrators believed, Chuong (2008) found only 2% of teachers left for higher pay in another district or profession.

Collecting the educator attrition root cause data was crucial to the implementation of change idea solutions. Chuong (2008) suggested educational institutions need to clarify why teachers leave. Chuong found exit surveys had not been disseminated to site administrators from the district office; this information could have been beneficial if it had been provided as postemployment feedback to make system changes in the future. Similarly, Kelchtermans (2017) saw the benefits of investigating teacher feedback and found retention issues that addressed the conflict of losing good teachers for the wrong reasons. The importance of establishing trusting relationships and the receiving of social recognition from leaders were illuminated solutions that aided educators in wanting to stay in the industry. Special attention to people's work lives made

my qualitative research relevant to the research aim of cultivating a system or process in work environments that foster adult well-being.

Stress and Burnout

Educator stress and burnout in the profession have been mentioned across multiple studies as the primary root cause to attrition rates (Brasfield et al., 2019; Squires, 2019; Squires et al., 2022). Coleman (2021) defined burnout as stress and exhaustion. Toxic environments, boredom, feeling overwhelmed, and being underappreciated were all effects of stress and burnout. From his survey data, Coleman suggested possible solutions to burnout; solutions included employees rediscovering their why, speaking up and advocating for their teams, changing their perspective, changing a role, or even changing the work location. Holme (2021) framed student and faculty stress in education with four critical points in their careers: (a) sources of stress, (b) coping mechanisms, (c) individualized interactions with stress, and (d) stress-related burnout. Their methodology was qualitative, as they conducted observations and interviews. Data suggested stress could be used for good in some cases but when compounded would ultimately be harmful.

Will (2021b) focused on issues of stress, burnout, and depression as the main reasons that caused educators to prematurely leave the industry. From a survey completed in January and February of 2021 for practicing teachers across the United States, 78% experienced frequent job stress with 1 in 5 unable to cope (Will, 2021b). Half of the teachers reported feeling burned out, and 27% reported a diagnosis of depression (Will, 2021a). One large stressor was childcare for the children of teachers. For example, Will reported 32% of teachers were required to provide childcare and conduct distance learning classrooms. One in four teachers reported they would likely leave the industry by the end of the school year, which was the summer of 2021.

Additionally, racial demographics were a critical data point as Black educators were the most likely to leave their teaching positions, despite only making up less than 7% of the teaching workforce. Following the survey, Will encouraged districts to examine data more proactively and initiate mental health support and efforts for their staff.

Loewus (2021) found that of 700 teachers questioned, 84% felt teaching was more stressful following the COVID-19 global pandemic. Teachers shared the social distancing aspects of their jobs made teaching much more difficult; the percentage of teachers who stated they would “somewhat or likely leave” teaching in the next 2 years increased from 34% in the fall of 2019 to 54% in March 2021. Additionally, Loewus suggested increasing teachers’ salaries and providing teacher recognition were strategies to help keep teachers in the classroom.

Administrative Leadership

Administrative support and connection to teachers has been a recurring theme in the research to combat educator attrition. Findings from Buchanan’s (2020) data included a strong need for administrative support and an emphasis on teacher recruitment and retention. Buchanan offered several examples of stressors for educators and how they related to teacher attrition. The primary connections to Buchanan’s problem statement included teacher time and energy and how administrators supported teachers.

Administrative leadership styles have also significantly impacted attrition rates. Stafford (2007) analyzed the importance of principal leadership styles and the retention of new teachers (i.e., those in their first 5 years of teaching) in one public school district in Tennessee. Stafford analyzed three types of leadership: (a) transformational leadership, (b) transactional leadership, and (c) laissez-faire leadership. The data supported the conclusion that transformational principals positively impact teachers. On the other hand, teachers were negatively impacted by

laissez-faire leadership and there were no significant findings regarding the impact of transactional leadership. The *transformational leadership* style was characterized as clear communication, charisma, adaptability, and empathetic support (Bass & Riggio, 2005). Bass and Riggio (2005) stated people have thought transformational leadership increased intrinsic motivation in a subordinate; similar themes have been seen in other school environments. In their research of teacher retention and attrition barriers in rural schools, Whaland (2020) found teachers benefitted from job satisfaction, community engagement, and administrative support to remain at their current assignment. Conclusively, Whaland stated rural schools were at an advantage when they could sustain highly competent and consistent teaching staff.

Administrative support and more effective principals could keep teachers in their school sites, especially high-performing teachers. For example, administrative support includes having site leaders who offer more support for new teachers and who make a commitment to the personal and professional growth of their staff. Effective principals demonstrate their abilities by enforcing the school rules, holding strong communication with the school staff, and recognizing staff's accomplishments (Mouw et al., 2021). Grissom's (2011) study showed a correlation between teacher attrition rates and principal effectiveness; as administrators supported new teachers and committed to further professional growth for themselves and their staff, teacher attrition rates dramatically decreased. Weiland (2020) stated school leaders played an influential role in overall teacher well-being in positive and negative relationships. Weiland's study also uncovered positive relationships and teacher well-being were cultivated when school administrators showed genuine interest in their staff. Thus, their research suggested school leaders and principals played a critical role in the personal growth of teachers related to their self-care or well-being regarding their professional experiences in education (Mouw et al., 2021).

Walker (2009), in a study of 98 schools and principals from the 2006–2007 school year, attributed school leadership attrition rates to school site performance. They suggested school districts should build a policy for site administrators in their systems to support the overall educational structure further. Walker showed the significant connection between the absence of a school leader and overall student achievement, customer satisfaction, school initiatives, and overall school performance.

Teacher Induction Programs

Educator attrition factors can connect to teacher preparedness programs. Park and Choi (2009) focused their research on adult learners who failed to complete their online education. Quantitative data suggested the reason why participants did not complete their online education was due to a lack of family and organizational support for the student. Additionally, a lack of motivation was strongly associated with coursework incompleteness and subsequent drop-out. Additionally, considering the continued educational requirements teachers must complete to remain sound with their school districts, educators may feel additional burden and stressors to not stay in the organization. Organizational structures could benefit from using Park and Choi's (2009) research in their practices as professional development leaders to improve and foster connections with teachers.

Strategies of Staff Well-Being

Madigan and Kim's (2021) research suggested a significant relationship between these two circumstances and attrition rates. Their research also suggested symptoms of burnout may be emotional contagions via an interpersonal transmission that may affect or even amplify other staff's symptoms (Madigan & Kim, 2021). As stated in the Collaborative of Academic and Social Emotional Learning (CASEL)'s 2020 report on *Preparing Youth for the Workforce of*

Tomorrow: Cultivating the Social and Emotional Skills Employers Demand: “Employers frequently named communication and interpersonal skills, self-management skills, the ability to collaborate or work in teams, problem-solving skills, and integrity or the ability to make ethical decisions as the most in-demand” (Terroba, 2021, para. 2). Terroba (2021) stated the core social and emotional skills students and adults need—both developmentally and in the multiple environments in which they live—are a high priority that require clear and concise language across contexts and environments. Terroba recommended well-being instruction be applied at the classroom level because it is just as important for adults who lead these initiatives to receive SEL professional development. Resources are available on the CASEL website, which has highlighted an area for strengthening SEL for adults. Although robust research has confirmed adults need to cultivate and practice social and emotional skills, much has yet to be established about how to support this development strategically and systemically (CASEL, 2022).

One research-based strategy that has been deemed impactful is creating a culture of wellness. Barrett and Joseph (2021) highlighted the influence of leaders by emphasizing four main pillars: (a) impact (i.e., acknowledgment of stress), (b) a shift in strategy (i.e., would be done differently), (c) a change in data used for decision making (i.e., identifying gaps), and (d) shifts in consideration (i.e., elevating collaborative partnerships to support wellness). Their research showed 61% of educators reported their work was “always” or “often” stressful. One tool that Barrett and Joseph used to illustrate this dynamic was the self-care wheel. The wheel has six wellness categories: (a) psychological, (b) emotional, (c) spiritual, (d) personal, (e) professional, and (f) physical that attribute to life balance. Researchers have placed a call to action on what steps can be integrated to create a self-care space and prioritize these strategies in the workplace (Barrett & Joseph, 2021).

The behavior of gratitude was a strategy Brown and Wong (2017) found to be an effective method of improving mental health needs. Their research supported people using the approach of extending gratitude to others. Statistically, writing gratitude in notes or letters helps the brain shift from toxic emotions (e.g., resentment and envy) to positivity and happiness. Brown and Wong's mixed-method study used three control groups concurrently in counseling or therapy sessions: (a) the first group wrote gratitude letters weekly, (b) the second group participated in a written gratitude activity, and (c) the third group did no writing activity. After 4 weeks, Groups 1 and 2 demonstrated higher levels of gratitude and happiness than Group 3. After 12 weeks, the results increased significantly; brain chemistry showed greater activation in the medial prefrontal cortex for Groups 1 and 2, demonstrating a physiological change that allowed participants to be more sensitive to the experience of gratitude.

Establishing Trusting Relationships in the Workplace

Establishing trusting relationships was a primary driver that impacted an increased number of staff who felt connected in their workplace environment. Trusting relationships may be achieved through secondary drivers of engagement structures, inclusive environments, and strong leadership attributes that foster one-to-one connections. Relationships play a vital role in promoting well-being, which is why building relationships in an educational environment is thought to be a powerful tool against burnout and attrition (Weiland, 2021). Additionally, this strategy makes room for leaders to create a path to foster positive emotion in teachers and makes establishing a trusting relationship a primary focus (Weiland, 2021).

Much research has suggested schools can mitigate teacher attrition rates by building a healthy working environment for their educators (Casely-Hayford et al., 2022). School systems can be created and adhere to policies that support frequent follow-up with staff and counteract

occupational psychosocial hazards, mental health issues, and illness of school employees (Casely-Hayford et al., 2022).

Weiland's (2021) research study focused on the collegial relationships between colleagues and school leaders, as a support system. Across those interviewed, educators stressed the importance of relationships that included vulnerability, transparency, and the ability to rely on one another during challenging times (Weiland, 2021). There was also the essential characteristic of holding space for emotion in the workplace. This characteristic was a powerful component in studies about teachers who stayed connected in their professional settings, suggesting positive emotions were a critical piece in human flourishing (Weiland, 2021).

Significance of the Study

The topic of connectedness in the workplace can matter for multiple reasons. In technical rationale, employee turnover is a high cost to educational institutions (Nguyen, 2021). Nguyen (2021) provided research that showed high teacher turnover costed large urban districts from \$10,000–\$26,500 to replace a single teacher who left the school district; onboarding and hiring practices depleted countless human resources hours; and work climate and culture impacted the good work organizations did for districts and schools, which ultimately impacted time directly spent to improve outcomes for children. My dissertation study has a potential impact on numerous educational institutions. When employees have a sense of belonging, they feel connected to their colleagues through shared experiences and opportunities to practice self-awareness and social awareness with one another (Squires et al., 2022). Providing an engaging environment also addresses employees' desires to be more assertive in communicating with others and collaborating in daily and long-term tasks in shared projects in the department. Therefore, by fostering conditions where individuals feel safe and connected, school leadership

may see a decrease in attrition rates (Squires et al., 2022).

My objective in this dissertation study was to research the potential effects of the implementation of bimonthly team huddles in department structures and systems. I believed intentional team huddles would be the change that most impacted employees' connectedness and belonging. All team huddles in this study included researched-based practices and activities from CASEL and NEP that promoted engagement and inclusivity. Participants in this study provided valuable insights into increasing individual well-being, connection, team building, and communication among administrative leaders. Although implementing team huddles is not new in education, I tested the intentional design of activities with components of well-being and team building for the first time in this organization. Participants helped develop this type of collaboration for others to gain insight.

Ultimately, this work was beneficial to the participants who engaged in the study. When employees have a sense of belonging, they feel connected to their colleagues through shared experiences and opportunities to practice self-awareness and social awareness with one another. I intentionally addressed their desire to be more assertive in communicating with one another and collaborating more in their daily and long-term tasks in shared projects in the department. By fostering an environment where individuals felt safe and connected, the department team participants could continue to enhance their communication and collaborative opportunities. The intentionality and design of the team huddles were implemented on a small scale with the Appleworks educational department. There is a potential to increase implementation to other branch departments and, eventually, to the entire organization with all departments participating in team huddles to improve communication and collaboration. The greatest scale of this change idea would be to extend the team huddle model to school districts and school sites that this

organization directly works with to make a deeper impact to site administrators and schoolteachers.

Ethical Considerations

The ethical considerations surrounding power dynamics and risk were nonexistent in this study as I was not an administrator or supervisor for the participants. The department participants were given the opportunity to participate or withdraw at any time. There was no risk to a potential power dynamic.

Regarding psychological safety, there was low risk to study participants to reflect on their personal experiences after a team huddle. The survey questions were not personal or about their life outside of the workplace; instead, they were designed to draw on work experiences related to meeting the efforts of connectedness to staff and self-reflection of well-being.

There was a potential opportunity for participant numbers to increase or decrease due to new hiring or attrition by department members resigning. Because I encouraged team building through the team huddle content, I included new team members in the team huddles in the event new employees were hired and were considered a new variable for the data collection.

Participants received no financial compensation for participation in this study. Participants helped to contribute to educational research that influenced future professional structures and systems in the department and organization. This research study aligned with the parallel improvement work the educational department began in 2020. Though the department had not used team huddles as part of its improvement theory, the department employees collectively determined a desire to start a new practice of team huddles as a new change idea in future practices at the end of this study. Participants who were included in this research study participated on their own volition and understood their participation was optional and additional

to their regularly assigned duties. There was no disciplinary action if any participant refused to participate or chose not to continue to attend the team huddles or complete the survey data. If this happened, I documented the participation and attendance in the huddle tracker.

Definition of Terms

Attrition: This term is defined as the exit or departure of employees from an organization for any reason (Gartner, n.d.).

Laissez-faire leadership: In its translation from the French language, laissez-faire leadership means, “Let people do as they choose.” Feder (2022) described laissez-faire leadership as the most hands-off of the three main leadership styles and gives employees more autonomy and freedom to complete their duties as they choose.

Plus/delta feedback: A facilitation at the conclusion of a meeting space in which participants engage in a conversation of what went well (known as a plus) and what could be improved (known as a delta). The facilitation of plus/delta feedback is intended to collect qualitative information from participants with the goal to improve future meeting spaces or structures (Cheng et al., 2021).

Retention: Retention is staying employed with an organization and not leaving for retirement, resignation, or other personal reasons (Society for Human Resource Management, 2017).

SEL: As defined by CASEL (2022), SEL is the process through which people acquire and apply knowledge, skills, and attitudes to develop healthy identities, manage emotions and achieve personal and collective goals, feel and show empathy for others, establish and maintain supportive relationships, and make responsible and caring decisions through five essential SEL competencies: self-awareness, social-awareness, self-management, responsible decision making,

and relationship skills.

Team huddles: A team huddle is an intentional, short gathering of a team or organization in which all participants meet to find consensus, regroup, and check in with each other (Insights, 2016). It is a different structure than a general team meeting and is intended to be shorter than 30 minutes. Team huddles can be held at any time.

Transformational leadership: Transformational leadership is a leadership style that consists of four main components: (a) communication, (b) charisma, (c) adaptability, and (d) empathetic support (University of Massachusetts Global, 2022); it is thought to increase intrinsic motivation in a subordinate.

Transactional leadership: Transactional leadership is a leadership style based more on reinforcement and exchanges which relate to goals and rewards for desired actions between a leader and subordinate (Stafford, 2007).

Chapter 2: Implementation and Analysis

Research Design

Improvement science has been used as a methodology in the medical and industrial fields for decades to support systems improvement (Bryk, 2020). Accelerated learning has been accomplished with continuous improvement methods and learning cycles (Bryk et al., 2017). Improvement science only made its way into the educational sector in the early 2000s when Deming's (1991) design connected research-based concepts that aligned with educational materials, programs, or tools through processes and research inquiry (Bryk, 2020). Bryk (2020) wrote, "In the end, the need for data transparency won out. Today, the commitment to transparency about results is settled, and this development is central in allowing improvement science to spring forward in the education context" (p. 4). There are several approaches to improvement science; the method practiced in this research project was adapted from the Carnegie Foundation for the Advancement of Teaching (2016). This method was founded on six principles that formed the improvement paradigm: (a) being problem-focused and user-focused, (b) attending to variability, (c) seeing the system with process mapping and empathy, (d) use of measurements and applicable metrics, (e) inquiring with learning cycles which consist of plan-do-study-act (PDSA) steps, and (f) organizing with the spread and scale of networks.

The model for improvement is included in the six principles, which ties to the theory and driver diagram. A *driver diagram* is an improvement tool that organizes the various solution changes designed to fix a problem of practice. The driver diagram encapsulates a theory for improvement which hypothesizes an overarching menu of supportive strategies that are interconnected to reach a common goal (Bryk et al., 2017). The model for improvement connects three essential questions using the PDSA cycle as a framework for the improvement process

(Hinnant-Crawford, 2020). The three questions include: (a) asking the improver what they are trying to accomplish, which is established with the goal or aim statement; (b) asking how the improver will know the change is an improvement quantified with metrics gathered; and (c) asking what changes can be made that will result in an improvement, which are change ideas established in the improvement theory and driver diagram.

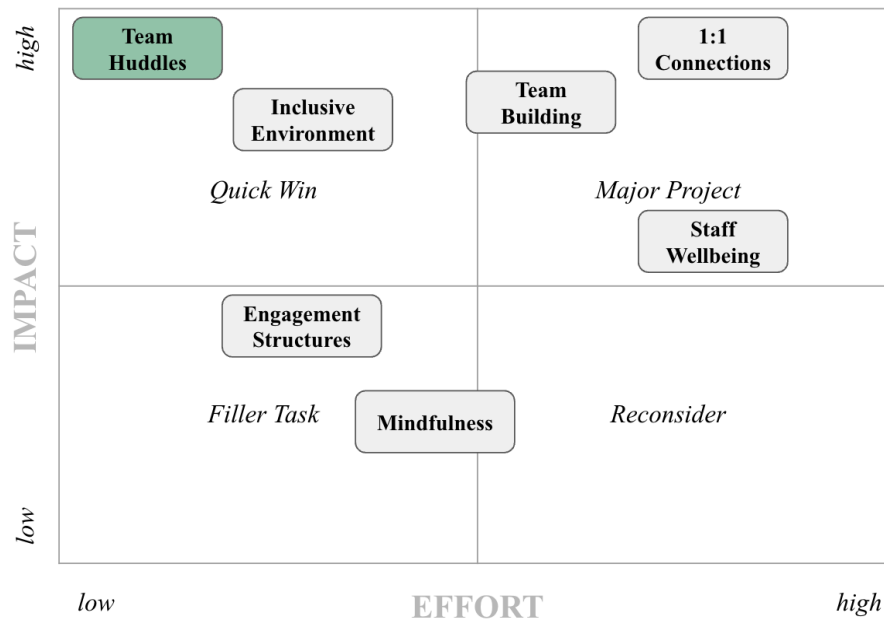
To have measurable improvement, the team must set a target, be intentional about its focus, and then develop this process in small steps (Ahlström, 2015). Additionally, continuous improvement is more impactful in smaller projects where the improvement can be seen. The department leaders in this study decided to focus on the area of establishing trusting relationships and communication, so meeting spaces would naturally be the point of most impact.

The change idea tested in this research study was six organized team huddles conducted over 3 months. Threaded in each huddle agenda (see Appendix B for an example) was a variation of the five social-emotional learning (SEL) competencies to open a space for communication: (a) self-awareness, (b) self-management, (c) social awareness, (d) relationship-building skills, and (e) responsible decision making. Activities helped build capacity for competencies and offered strategies to improve self-care and well-being for team members.

Team huddle participants also engaged in a feedback structure at the end of each huddle through a *plus/delta reflection*. Cheng et al. (2021) conveyed it is ideal for the facilitator to generate two lists of behaviors that prompt further discussion, reflection, or learning during debriefing to improve the meeting structure. As the primary researcher, I acted as the meeting facilitator and asked participants what went well in the meeting regarding positive feedback on structural components and noted the meeting input in a plus column. I then asked for delta feedback, which included all areas of the process that might be improved. It was important I

remained neutral and provided no response to the comments and critiques I received. These data informed the next team huddle as part of the continuous improvement method and learning cycle. The intentionality of any changes made were reflected in visual slide decks and the working huddle agenda.

With an overall aim of improving communication and well-being in the workplace, the Appleworks department team focused on interactions that helped them intentionally stay connected with one another. Trujillo (2022) wrote, “Though some of us may value our independence and appreciate time in solitude, we also need social interaction. Research demonstrates that when we make positive social interactions, we ‘feel’ better” (p. 102). In my current theory of this dissertation research study, there are seven secondary drivers around which the improvement project may conduct learning cycles to increase the number of staff who feel connected with their peers in the workplace. Team huddles were the only structure that had not been explored to the department’s level of inquiry and detail. Team huddles were also uniquely tied to all four primary drivers and could include all six other secondary drivers. Using an assessment of impact seen in Figure 2, team huddles rated as the highest impactful change idea in the theory for improvement. Finally, by the nature of their structure, team huddles allowed for data points to be used for quick analysis and rapid learning cycles in the PDSA rhythm.

Figure 2*Secondary Drivers in Impact/Effort Prioritization Matrix*

Note. I created this visual after taking the team through an exercise.

Population and Sampling

I used convenience sampling in a regional educational organization in central California with the pseudonym of Orange Blossom Educational Institution (OBEI). This organization supported 43 local educational agencies in its geographical boundaries and served over 100,000 students from preschool age to 12th grade. In the structure of the regional boundaries was the central office of 1,500 employees that supported internal and external programs in its five branches and 38 departments. In the last 2 years, the county office departments worked on continuous improvement efforts in their internal infrastructures using data from internal and external surveys, which illuminated areas of success and opportunities for growth in their systems.

The Appleworks department was the focused target in which I conducted the research. The Appleworks department consisted of 11 educational leaders who ranged in both certified and classified positions of employment and varied educational credentials. Six of the educational leaders were certificated employees with professional experience that included principalships; vice principalships; local central district office positions; and specialized content consultants in English language development, mathematics, literacy, and special education. Five of the educational leaders were classified employees with historical professional experience as central office accounting, secretarial, and school counseling positions. At the time of the research, this department served the greater OBEI organization as district support for all 43 districts in the region in specific areas of compliance and accountability, maintaining policy documents connected to state and federal funding, and satisfying a variety of requirements from the California Department of Education. OBEI was led by one administrator who took part in all the team huddles as a participant.

The Appleworks department was selected for this research because of its initial interest in systems improvement. The department leader desired for employees to establish more connections with each other to enhance communication and collaboration skills. This desire was evidenced by survey data where employees scored significantly high in “avoiding hard conversations” and low in “operationalizing organizational values.” The entire department team was exploring continuous improvement cycles in its systems and structures and was establishing trusting relationships to help promote mental health and well-being with research based SEL strategies in the work environments’ current agendas and frameworks. Department employees dedicated one day a month as a team to address business topics and streamline some of the interdepartmental standard operating procedures.

Instrumentation and Procedures

The driver of establishing trusting relationships was based on a department survey conducted in January 2021 and January 2022. The department acknowledged the internal data collected showed consecutively low scores in “avoiding hard conversations” and “operationalizing organizational values.” This annual survey came from a self-assessment tool that was created by the department’s data coordinator and based on Brown’s (2018) book titled *Dare to Lead*. The department data coordinator took the original self-assessment from *Dare to Lead* and adapted it to an anonymous survey for all staff members to take using a Likert-scale model with 11 specific characteristics of leadership styles.

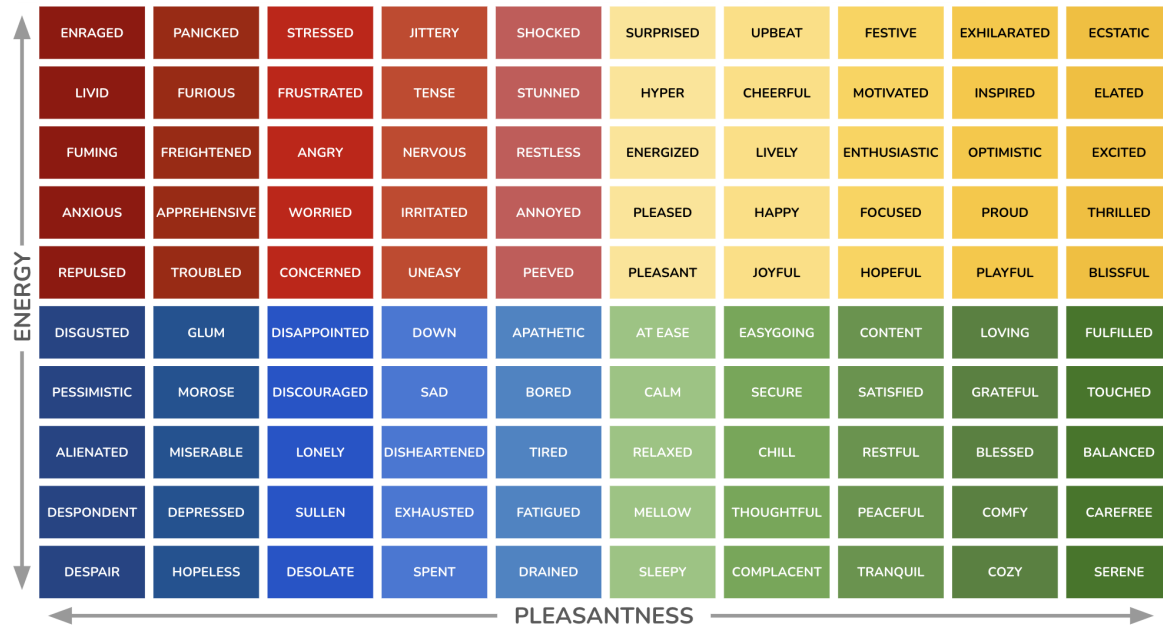
The driver of the theory was connected to well-being strategies, which were measured by the collection of pre and post-research survey data of the strategies within a 90-day or less window from the initial huddle implementation. The survey was adapted from Saakvitne and Pearlman (1996) research. All department team members took the anonymous survey, which gauged participants’ self-reflective status with 11 questions about their work and professional care practices. The pre-research survey was given before the first department team huddle (see Appendix C). The questions were given in a Likert-scale format: 0 (*I never do this*), 1 (*I barely or rarely do this*), 2 (*I do this OK*; e.g., occasionally), 3 (*I do this well*; e.g., frequently), and “?” (*this never occurred to me*; e.g., it is a new concept to the employee). The 11 workplace/professional care components included rated self-reflection on whether the employee participated in the following behaviors:

1. Take a break during the workday (e.g., lunch).
2. Take time to chat with coworkers.
3. Make quiet time to complete tasks.

4. Identify projects or tasks that are exciting and rewarding.
5. Set limits with clients and colleagues.
6. Balance my caseload so that no 1 day or part of a day is “too much.”
7. Arrange the workspace, so it is comfortable and comforting.
8. Get regular supervision or consultation.
9. Negotiate for my needs (e.g., materials, resources, professional learning).
10. Have a peer support group.
11. Develop a nontrauma area of professional interest.

A postresearch survey using the same 11 questions with a Likert-scale response was given at the final team huddle at the conclusion of the sixth huddle agenda (see Appendix C).

The fourth driver, which emphasized the importance of systems and structures with continuous improvement methods, was measured using several instruments. The first instrument was an anonymous individual exit survey that each huddle participant took at the conclusion of the 30-minute huddle. It was important the agenda reflected time to take the exit survey so the team huddle did not exceed the half-hour allotted block. Boudett and City (2018) stated, “People have a right to know when a meeting is supposed to end, and additionally, a right that will happen” (p. 34). The survey asked for two pieces of data related to the individual’s feelings at the end of the huddle. The first set of survey data used the Mood Meter tool for participants to choose one descriptive word from a word list that described the individual’s feelings at the conclusion of the team huddle. For clarity, each participant had access to a picture of the Mood Meter (see Figure 3).

Figure 3*The Mood Meter Chart*

Note. Adapted from *Permission to feel: Unlocking the power of emotions to help our kids, ourselves, and our society thrive*, by M. A. Brackett, 2019. Celadon Books.

The Mood Meter was developed by a Boston College professor named Russell (Brackett, 2019) who based the measurement on two axes of pleasantness and energy with positive and negative level scales. With the x-axis representing pleasantness and the y-axis representing energy, different moods are elicited from present feelings, which are broken into four main quadrants with colors of red, yellow, green, and blue. If a person had high energy and high pleasantness, they were in the yellow quadrant, and their mood was described with a word such as “optimistic,” “upbeat,” or “pleasant.” If the person felt the same level of pleasantness with lower energy, they were in the green quadrant, which includes words of feeling “peaceful,” “serene,” and “calm.” If the person had lower energy and lower pleasantness, they were in the

left quadrant, which is blue and consists of feeling words like “tired,” “depressed,” “sullen,” and “bored.” Finally, if the person had lower pleasantness on the *x*-axis and higher energy on the *y*-axis, they would be in the top left quadrant, which is red and consists of words such as “stressed,” “anxious,” “angry,” or “uneasy.” Brackett (2019), the director of the Center of Emotional Intelligence at Yale, had taken the work of Professor Russell and expanded the quadrants to feeling words, with the top 100 words aligning to those four main quadrants. In his book, *Permission to Feel*, Brackett explained individuals must embrace these emotions by acknowledging them as humans. The Appleworks’ department has used the Mood Meter as a standard communication tool since 2019, and all team members were familiar with the meaning and word choices. Due to the familiarity of the tool with current structures in place, I determined using the Mood Meter was an appropriate method for data collection as a metric of emotion for the Appleworks department.

Pleasantness Likert Scale

A second exit survey question allowed participants to calibrate their pleasantness in a simple 5-point Likert scale with a score of 1 (*most unpleasant*) to 5 (*most pleasant*). A pictograph of simple faces with expressions accompanied the numbers from 1–5. This scale was taken from a research study in which adults and children used a valence scale to identify their emotions (Mouw et al., 2017). The two measurements of pleasantness provided data on experiences immediately following the huddle. All survey data were collected anonymously, and the survey was given with two options: (a) a written option with a one-page printout and a pencil provided, or (b) a digital option using the participant’s mobile device by way of a QR code provided at the conclusion slide of the team huddle.

Logistical Instruments

I used additional measurement instruments to monitor technical information aligned with calendaring and time. The first instrument was a team huddle tracker to track attendance participation for all team huddles with a target attendance goal of 90% of members from the Appleworks department. I also recorded the dates of bimonthly huddles. The intention was to hold two huddles each month in addition to gathering opportunities provided during the currently scheduled full-day, monthly department meeting. The final data point I tracked was the duration of each team huddle with a target meeting time of 30 minutes using a window of 25–40 minutes maximum.

The second internal data collection tool was a synthesized summary tracker of each team huddle. The summary tracker housed the date of the huddle, the attendance number, and each team member's response to their Mood Meter word and pleasantness scale number from 1–5. I analyzed the data at the end of each team huddle. The information collected was not shared until the conclusion of the study to eliminate any risk of bias.

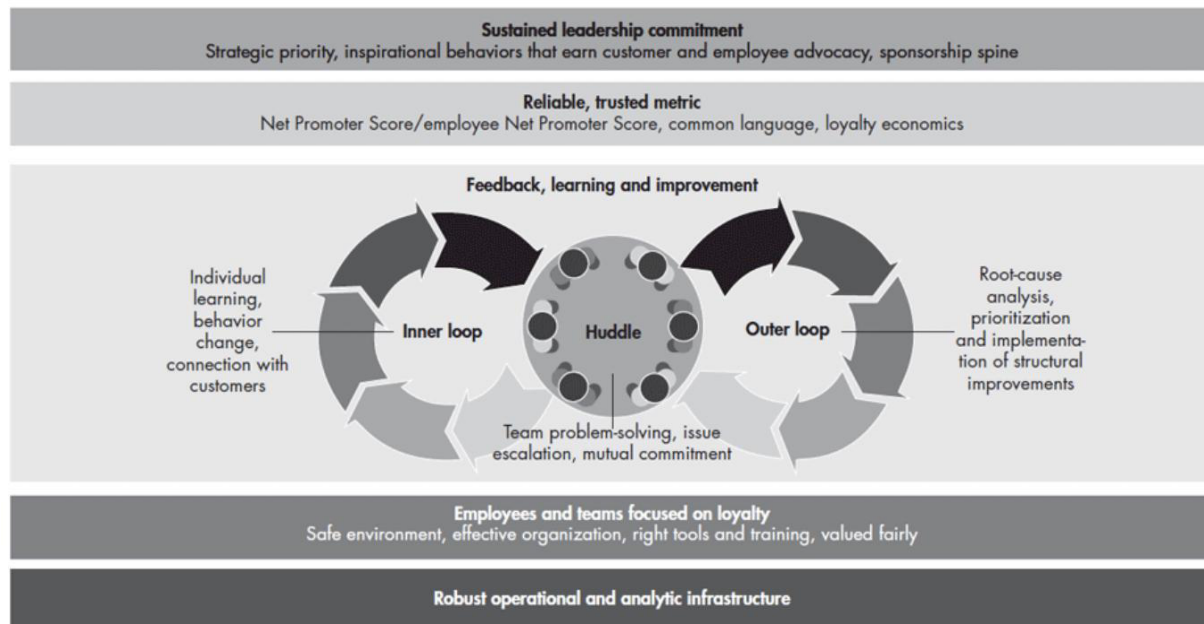
Administration Protocols

Huddles are defined as intentional, short gatherings of a team or organization in which all participants gather to find consensus, regroup, and/or check in with each other (Insights, 2016). Huddles have less structure than a meeting and are designed to align with a central goal. Insights (2016) recommended huddles be no more than 15–30 minutes long and be held daily or weekly. Because the use of team huddles was a new change idea for the Appleworks department, the department leader requested to begin with a bimonthly implementation.

Huddles are built using the Socratic approach, designed to be self-directing, and include the supervisor, although the leader is not in charge of the huddle (Insights, 2016). In this research

study, I designed the huddle agendas and content, and I facilitated the huddle as an outside provider to allow all 11 Appleworks team members to engage fully. Based on my extensive training with Carnegie fellows in improvement science and serving in my administrative leadership role with the overall organization, the development of the huddle agenda and content aligned with my regular duties as the Director of Continuous Improvement and allowed me to be a credible creator of such resources.

Originating from the military, huddles have been used across the world in various industries from entrepreneurial businesses to hospitals to educational fields (Eguia et al., 2022). Huddles allow team members to work collaboratively, share their problems and potential solutions, and build a sense of teamwork (Markey, 2015). Markey (2015) shared, “huddles are a crucial link between a net promoter systems’ inner loop and its outer loop” (p. 1). In Figure 4, the inner and outer loop are seen as the feedback, learning, and improvement outcomes from the team huddle, which serve as the space to hold problem-solving and decision-making opportunities (Markey, 2015).

Figure 4*Huddles in the Net Promoter System Framework*

Note. From “Huddle Up!” By R. Markey, 2015, Bain & Company.

<https://www.bain.com/insights/>. Copyright 2015 by Bain & Company. Reprinted and used with permission from Bain & Company.

In one recent expanded study of multiple hospitals, the use of huddles was immensely impactful on teamwork, engagement, and job satisfaction across medical teams (Rowan et al., 2022). Medical institutions have used this structure to communicate between shifts and staff changes to provide accurate updates on patients. In an additional study, two surgical units completed huddles over 15 months (Zhu et al., 2020). Researchers found the quality of teamwork improved among hospital staff from a prehuddle survey, moving from a 3.6 rating to a 4.2 rating using a 5-point Likert scale (Zhu et al., 2020). The hospital staff improved communication and established a more collaborative environment between shift changes (Zhu et al., 2020). In a third

study (Eguia et al., 2022), one hospital implemented daily team huddles during the height of the COVID-19 global pandemic and found that 95% of staff found huddles effective in their communication and staying updated, 89% of team members felt the huddles improved their communication with each other, and 99% of staff members felt safe speaking up in the daily debrief (Eguia et al., 2022). They unanimously agreed team huddles improved their patients' experiences (Eguia et al., 2022).

Huddle Design

The six bimonthly department team huddles that were held as a part of this study included an interactive agenda and were held for up to 30 minutes each. Huddle agendas were intentionally predesigned for inclusivity, including the format of three signature practices from CASEL. The three signature practices were (a) welcoming rituals, (b) engagement strategies in the agenda's body, and (c) an optimistic closing. Engagement activities came from the CASEL roadmap of "Reunite, Renew, Thrive" (CASEL, 2020); and the National Equity Project's (NEP) "Designing and Facilitating Meetings for Equity," (NEP, n.d.-a) "Liberatory Design in Complex Systems," (NEP, n.d.-c) and "Leading for Equity: Leading from the Inside Out" (NEP, n.d.-b). Huddle agendas deliberately brought SEL practices into the workplace environment to foster connectedness. These 30-minute huddle sessions focused on team building, inclusion, and responsiveness to each other. The remaining content included alignment with the department's current focus on team building.

The format and structure of the team huddles were designed based on the critical concepts of Boudett and City's (2018) book, *Meeting Wise*, and included principles such as starting and ending on time, setting an upfront intention agenda, soliciting feedback from participants through a plus/delta opportunity at the conclusion of the meeting, and timing

activities in blocks of 5-minute increments. The six team huddles were scheduled on Monday mornings from 8:15 am to 8:45 am. This timeframe allowed participants to start their workday (i.e., they were contracted to start at 8 am) and settle in before attending the team huddle. The Appleworks' department leader chose Monday mornings as the day of the week to initiate this change idea cycle for improvement with the objective that the beginning of the week was valuable for sharing information and connections in hopes they continued throughout the workweek. Additionally, the department employees met in a secluded area (e.g., a conference room) to allow more privacy for individuals to speak more candidly and freely rather than in an open office space shared with multiple other departments. The calendared huddle dates were as follows:

- Huddle 1: Monday, October 10, 2022
- Huddle 2: Monday, October 24, 2022
- Huddle 3: Monday, November 14, 2022
- Huddle 4: Monday, November 21, 2022
- Huddle 5: Monday, December 5, 2022
- Huddle 6: Monday, December 12, 2022

Team Huddle Implementation

A total of five team huddles were held with the Appleworks department in October, November, and December. Two team huddles were scheduled each month, in addition to the department's monthly full-day meeting. One team huddle (i.e., Huddle 4) was canceled due to a holiday conflict and illnesses in the department. All huddles took place on Mondays to launch a workweek with a start time of 8:15 am and a target end time of 8:45 am.

Huddle Logistics

The original plan was to have eight huddle meetings within 3 months; however, the Appleworks department adapted this arrangement and settled on a bimonthly approach with six huddles. Due to the location of the department and a desire to have privacy for the team of 11 employees and one facilitator, a room large enough to accommodate 12 adults was needed. Calendaring the huddles and reserving a conference room were done 1 month before the meeting. The location changed to three separate spaces throughout the 3 months. The team agreed this arrangement was a better solution than conducting the team huddles in an open space. Before Huddles 1 and 2, the department leader sent out a reminder email on that Monday morning with the location and time. Upon feedback after Huddle 2, participants requested the reminder emails be given the Friday prior to the Monday team huddles; a reminder email was sent to employees for Huddles 3–6 on the Friday before the team huddles with the room location and start time. The email strategy did not reflect a detrimental effect on attendance. Those who did not attend were absent for one of two reasons: an absence from illness or a preapproved nonworkday absence. Huddle 4 was canceled due to a majority of the Appleworks team being absent for a combination of a holiday planned nonduty and illness. Huddles 5 and 6 remained scheduled and were completed in the final third month of the study.

The time calendar for each huddle was set with the expectation that meetings would start and end on time, regardless of tardiness. Huddle 3 was slightly delayed due to a conference room logistical issue, and the meeting started 2 minutes late. Consequently, the meeting ended 3 minutes late. The final huddle lasted until 9:02 am because the Appleworks team requested to extend the time to discuss further the team huddles' structures and how to continue the implementation after the research study was over.

Huddle Content

All huddle agendas were created in advance using the *Meeting Wise* template, which included minutes, content blocks for each section, and a space to capture notes and plus/delta feedback (Boudett & City, 2018). Only the facilitator and department leader had access to the agenda before each team huddle meeting. A slide deck was supplied as a visual for each huddle. The slide deck included a welcome slide, a description of a team huddle, a slide that depicted the three-prong agenda for the morning, the content used in that huddle, a plus/delta slide, and a final feedback survey slide with a QR code for team members to take the exit survey.

All six huddle agendas (see Appendix B for an example) included the three signature practices from CASEL. Welcoming rituals included a variety of one-to-one sharing with random partners, a whole group whip-around model of sharing, or individual reflection activities. *Whip around* is a term used with sharing structures in which each person takes a moment to share and then the next person (immediately to the right or left) will offer a response; the communication continues around the circle or sharing space until all voices are lifted into the room. Engagement strategies throughout the six huddles included all participants standing up for activities instead of sitting for the huddle, poster creation, and brainstorming sessions as facilitated to build collaborative connections. All team huddles ended with the same optimistic closing, which was adapted from “My Next Step” (CASEL, 2019) from the SEL signature practices handbook and by having each department member share one person they would connect with that workweek and in one to three words the subject on which they would connect. Additional resources came from the NEP’s (2020) “Designing and Facilitating Meetings for Equity,” “Liberatory Design in Complex Systems,” and “Leading for Equity: Leading from the Inside Out” workbooks.

Before the team huddle rollout, the Appleworks department took part in a 3-day

leadership retreat where the team looked at developing some relational and technical skills to launch their new year. One of the department's activities called for team members to look at their skills and traits and how they could relate those skills to the greater team. Each team member took a Myers-Briggs Type Indicator (MBTI) assessment, which is a personality test codeveloped in 1943 by Katharine Cook Briggs and her daughter Isabel Briggs Meyers (Stein and Swan, 2019) as influenced by the teachings of Swiss psychologist Carl Jung. Fooratan and Freiheit (2009) promoted management's use of this assessment to encourage groups of individuals to learn about themselves, each other, and how these components fit together to boost team success. The Myers-Briggs framework provides an understanding of differences in what each team member brings to others with four dimensions: (a) their source of energy (Extraversion–Introversion, E–I), (b) how they take in information (Sensing–Intuition, S–N), (c) how they make decisions (Thinking–Feeling, T–F), and (d) lifestyle (Judging–Perceiving, J–P). Because the department wanted to focus more on building relationships and communication, I included digging into the eight different dichotomies that MBTI had to offer in the facilitation of the content of the team huddles.

The initial launch huddle included content focused on the theme of superpowers. Individuals shared a unique skill they held that they could offer to the rest of the department. The next four huddles included content that covered the four dichotomies of MBTI. The second huddle focused on extroverts versus introverts, as department members described their ideal weekend and then learned how their personalities influenced those decisions of preferred activities. Huddle 3 focused on sensing and intuition and how that played out when they designed events for districts and school sites. The fourth huddle highlighted thinking and feeling personalities, which allowed space for team members to hold a constructivist dyad conversation

by using a protocol from NEP. Because the fourth huddle had to be canceled, a packet of information was shared with the team and revisited briefly at the following huddle. The fifth huddle finished the MBTI learning with an activity for judgers versus perceivers where team members were challenged with a universal prompt and the differences in answers. The sixth and final team huddle provided some finality to the well-being learning by holding space for each department member to craft a self-care plan for the upcoming winter break with an implementation checklist to ensure success in their planning.

Huddle Exit Survey

At all five huddles, employees had two options for taking the exit survey using the Mood Meter word and the Likert scale from 1–5 of pleasantness (see Appendix D). Participants could use their device and the QR code on the slide deck to be directed to an anonymous Google survey form and complete the two exit questions, or they could choose a paper and pencil method provided at each huddle. An empty folder was provided to house paper surveys that were completed. In total, the paper survey option was used 5 times by three participants.

Pre- and Post-Intervention Survey

Before the introduction of team huddles, all department team members were given the 11 workplace/professional care questions in a rated self-reflection survey, adapted from Saakvitne and Pearlman (1996). Initially, participants had an option to take the anonymous presurvey in digital format; however, due to some complications with receiving all the surveys, all 11 participants were given a paper survey to be completed and recorded. I determined to have participants take all pre- and post-intervention survey data anonymously to align with the method of annual survey data that the Appleworks department had participated in every January since 2020. The participants were given the option to take a photograph of their assessment, photocopy

their assessment, or transfer their scores if they wanted to see their individual growth from the presurvey to the postsurvey. The focus of this data collection was not on individuals but on the team's dynamic. For that data collection, the data were analyzed using a team average for each question on the pre- and post-intervention surveys. The results of the preintervention survey were not shared to prevent bias in future survey results.

During the final team huddle, I embedded time in the huddle agenda for all participants to take the post-intervention survey. All 11 participants completed the survey. After the publication of this dissertation, the final results will be presented to the Appleworks department.

Huddle Feedback Data

Individual huddle feedback allowed me to see if there was an increase in the pleasantness of the huddle structure itself related to the overarching aim of increasing connectedness among staff. I theorized creating a positive work environment by establishing trusting relationships and focusing on social-emotional well-being in that structure would inform as a variable that produced increased outcomes using a team huddle structure.

Multiple data points were collected to assess this change idea and analyze the impact. Participant attendance provided evidence for a leader to see the impact and cost of a change idea in a current work structure. I raised questions to determine whether holding a Monday meeting was a hardship for participants or whether the benefit of launching a workweek together outweighed the cost.

I used the Mood Meter to quantify feelings that may have arose in themes for the team. My analysis of the Mood Meter data was helpful in determining the team huddle time and how it related to the department's relational goals and connection to their improvement as they looked at their current structures in place.

I used a third metric to capture a self-reflection of pleasantness from a Likert scale of 1–5. The Mood Meter used a pleasantness scale through quadrants from highest to lowest levels. A calibration of pleasantness was cross-connected to the Mood Meter data by capturing a Likert scale of pleasantness from 1–5. This method provided one way to quickly analyze the team huddle using a quantitative value from 1–5.

Data collection to support that inquiry occurred at the beginning and end of the 60- to 90-day learning cycle with each individual's pre- and post-anonymous survey. All survey data were summarized to look for status changes as a department whole and not as specific individuals. This further protected anonymity and kept the research low risk. The individual, anonymous feedback I collected was kept confidential, and results were not shared until the study's conclusion.

Each team huddle ended with an opportunity for data collection from each Appleworks team member. Individual feedback quantified the disposition of each participant after the team huddle was finished. This feedback process lasted no longer than 2 minutes and was accounted for in the 30-minute team huddle agenda.

The demographics of the Appleworks department team members included male and female employees who ranged in tenure with the department from its origination in 2016 to recent employees who were currently employed the month the team huddles began. Age ranges were not collected in this research. Department roles varied in the Appleworks department from certificated management positions to classified employees. All team members had an equal voice as team members and were encouraged to participate in decision-making activities in relation to agenda development and department improvement projects. The department's many projects included multiple roles and positions that led them.

All instrument data were kept anonymous and were not shared until the conclusion of the huddle cycles. This improvement project was part of an existing continuous improvement exercise the Appleworks department had been working on since October 2021. The data collected were not part of any evaluative structures in the company's scope.

One caveat regarding the collected information was that the data were quantitative by nature with little opportunity for each participant to further justify or explain their Mood Meter data after each team huddle with qualitative information. As a result, the collected Mood Meter data may be a result of external reasons or rationale rather than a true reflection of the individual post-team huddle as intended, which could potentially skew the collected data. For example, an employee who came to work with external outlying factors may have been negatively impacted by their morning, which could have been further reflected in their Mood Meter response with a lower energy or pleasantness word on the exit survey. Thus, it is essential to acknowledge how barriers such as external factors may have a positive or negative impact on the ability of employees to come to a collaborative space without bringing such distractions to the workplace.

Another variable to consider that might have affected the data collected was the time of day the team huddles were held. All gatherings were calendared as the first scheduled event for employees at the beginning of the week on a Monday morning. This timing could be a barrier to emotions as the huddle was first thing in the morning and there was the possibility of distractions that may have come from starting a workweek.

Quantitative Findings

The data from the pre- and post-intervention survey, which captured 11 questions on self-care in the professional workplace, held four values for each question with a response on a scale of 1–4. These questions required department team members to self-reflect and score themselves.

There was a fifth option of selecting a question mark (“?”) as an answer if the team member had never considered the self-care or well-being option in the workplace. The answers with a question mark were segregated from the data and analyzed differently. Table 1 depicts the pre- and post-intervention survey findings for self-reflection of workplace or professional self-care.

Table 1

Quantitative Professional Self-Care Survey

Question	Sept. mean	Dec. mean	% change
1. Take a break during the workday (e.g., lunch)	2.55	2.27	-0.28
2. Take time to chat with coworkers	2.55	2.64	+0.09
3. Make quiet time to complete tasks	2.36	2.27	-0.09
4. Identify projects or tasks that are exciting and rewarding	2.00	1.91	-0.09
5. Set limits with clients and colleagues	1.55	1.73	+0.18
6. Balance my caseload so that no 1 day or part of a day is “too much”	1.40	1.91	+0.51
7. Arrange workspace so it is comfortable and comforting	2.27	2.36	+0.09
8. Get regular supervision or consultation	2.30	2.18	-0.12
9. Negotiate for my needs (e.g., materials, resources, professional learning)	1.80	1.80	0.00
10. Have a peer support group	2.44	2.00	-0.44
11. Develop a nontrauma area of professional interest	1.63	1.43	-0.20
Average overall score	2.08	2.05	-0.03

Preintervention Data

In the preintervention survey participants completed in September, Appleworks department team members scored a total average of 2.08 on a scale of 1–4 on self-care in the workplace. On average, the lowest areas were in setting limits with clients ($M = 1.55$); balancing a caseload so that no one part of the day was too much ($M = 1.40$); negotiating for needs with materials, resources, and professional learnings ($M = 1.80$); and developing a non-trauma area of professional interest ($M = 1.63$). These data suggested areas that were a struggle could be categorized as individual boundaries and workplace self-care. The team members scored the

highest on two questions: taking a break in the workday such as taking lunch and taking time to chat with coworkers ($M = 2.55$) and having a peer support group ($M = 2.44$).

More than half of the items had a question mark applied to the answer by at least one team member and up to three questions by three individuals on a survey question. Developing a nontrauma area of interest was listed as something that had never occurred to three team members. Two participants noted identifying projects or tasks that were exciting and rewarding and having a peer support group were concepts they had never considered. At least one participant noted they had not considered (a) balancing a caseload, (b) getting regular supervision or consultation, and (c) negotiating for needs were self-care concepts in the workplace they had not considered before. Thus, I used the data to incorporate some well-being strategies into the team huddle content with the intention of building capacity.

Postintervention Data

In the postintervention survey collected in December, the Appleworks department team members scored an average of 2.05 on a scale of 1–4 with an overall decrease of -0.05. The team continued to score lowest in three of the four categories in the preintervention survey with setting limits with clients ($M = 1.73$, with an increase of +0.18); negotiating for needs with materials, resources, and professional learnings ($M = 1.80$, with no change); and developing a non-trauma area of professional interest ($M = 1.43$, with a decrease of -0.20). The sixth question noted in September (i.e., balancing a caseload so that no one part of the day was too much) went from an average of 1.40 to an increase of 1.91 (+0.51).

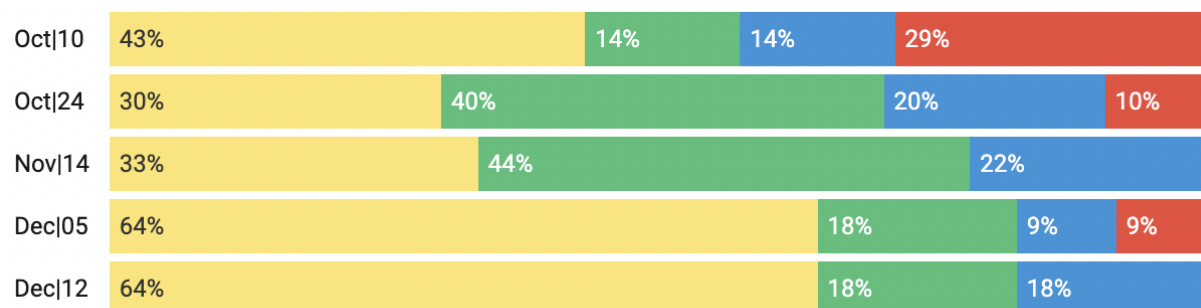
The highest scored questions were in 2 of the 3 highest scored question from the preintervention survey: taking a break in the workday ($M = 2.27$, and a decrease of -0.28) and taking time to chat with coworkers ($M = 2.64$, with an increase of +0.09). Arranging a workspace

so that it was comfortable and comforting became the second highest scored category with a score of 2.36 (an increase of +0.09). It is important to note having a peer support group reduced in average score from 2.44 to 2.00 (-0.44), although it was ranked in the top three before team huddles began.

In the preintervention survey, at least one team member applied a question mark to more than half of the items, whereas in the postintervention survey, only two self-care questions were answered with a question mark (i.e., negotiating for needs and developing a non-trauma interest). Both of these self-care questions were on the lowest scoring categories of all 11 questions. The evidence of participants being able to answer a category with a numerical value rather than a question mark could suggest they had built an awareness of social-emotional well-being strategies in the workplace.

Mood Meter Data

Mood Meter data were taken after each of the five team huddle sessions (see Figure 5). The most desired word choices fell under high energy and high pleasantness quadrants of yellow with a secondary desire to be low energy but still high pleasantness quadrants of green. At the end of the first huddle, 57% of participants were in the desired region. By the end of the fifth huddle, this number had increased to 82%, which resulted in an overall increase of 25% in high energy and pleasantness moods from the Appleworks team. More notable was the complete absence of any words from the red quadrant by the end of the fifth and final huddle.

Figure 5*Team Huddle Mood Meter Data*

Note. Yellow indicates high energy, high pleasantness; green indicates low energy, high pleasantness; blue indicates low energy, low pleasantness; and red indicates high energy, low pleasantness. The green and yellow mood meter responses were desired from the participant survey data.

Of the 100 words available in the Mood Meter, Appleworks department team members selected 29 words in the five huddle convenings (see Table 2). There was a total opportunity of 48-word submissions due to the absences of team members. The most used word by the team in all team huddles was “focused,” which they used 7 times. The following most used words were feelings of “pleasant,” “tired,” and “easygoing,” which were used 3 times each. The quadrant of blue words—which signifies low energy and low pleasantness—was identified with five words, including feelings of “tired,” “fatigued,” “alienated,” “apathetic,” and “drained.” The quadrant of words least used was the red zone—which signifies lower pleasantness and higher energy—and it totaled four words, including “annoyed,” “nervous,” “repulsed,” and “restless.” There were zero occurrences of a participant who did not choose a word.

Table 2*Team Huddle Mood Meter Word Occurrence (Pareto View)*

Mood Meter word	Mood Meter assigned color	Time used (minutes)
Focused	Yellow	7
Pleasant	Yellow	3
Tired	Blue	3
Easygoing	Green	3
Fatigued	Blue	2
Grateful	Yellow	2
Happy	Yellow	2
Hopeful	Yellow	2
Optimistic	Yellow	2
Alienated	Blue	1
Annoyed	Red	1
Apathetic	Blue	1
Calm	Green	1
Cheerful	Yellow	1
Chill	Green	1
Content	Green	1
Drained	Blue	1
Excited	Yellow	1
Fulfilled	Green	1
Mellow	Green	1
Motivated	Yellow	1
Nervous	Red	1
Peaceful	Green	1
Pleased	Yellow	1
Proud	Yellow	1
Repulsed	Red	1
Restless	Red	1
Sleepy	Green	1
Uplifted	Yellow	1

Note. Total variety number of words was 29 out of 48 survey opportunities.

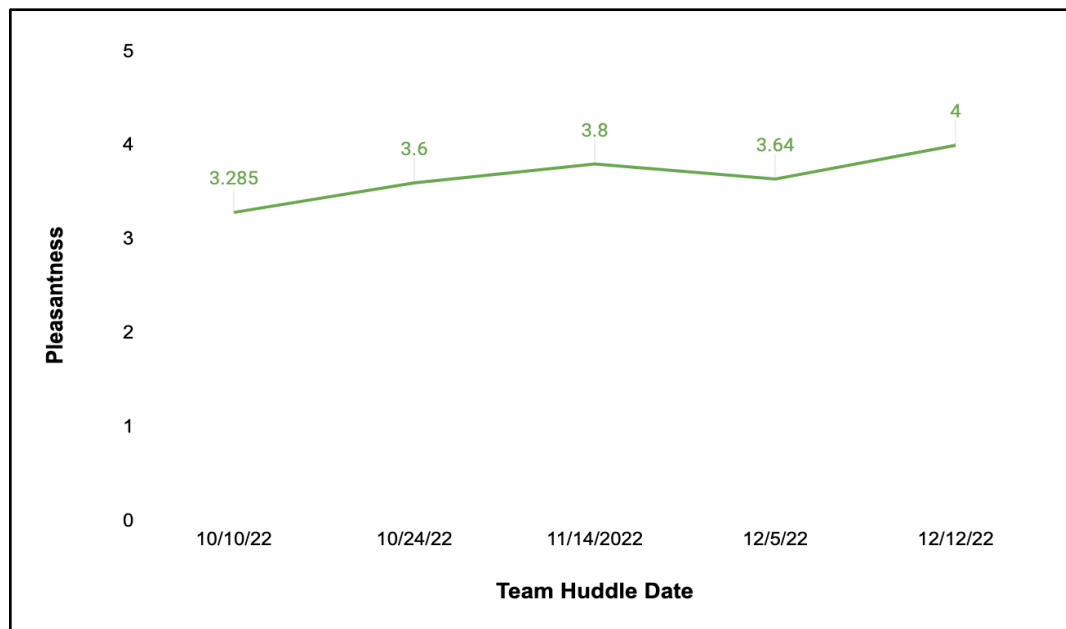
Overall Pleasantness Data

Overall pleasantness metrics were also collected at the conclusion of each team huddle using a Likert scale of 1–5 (see Figure 6 for a pictograph showing a variety of facial expressions relating to the numbers). The team average increased from the initial huddle (3.285) to the fifth

and final huddle (4.00) for a total of 0.715 points.

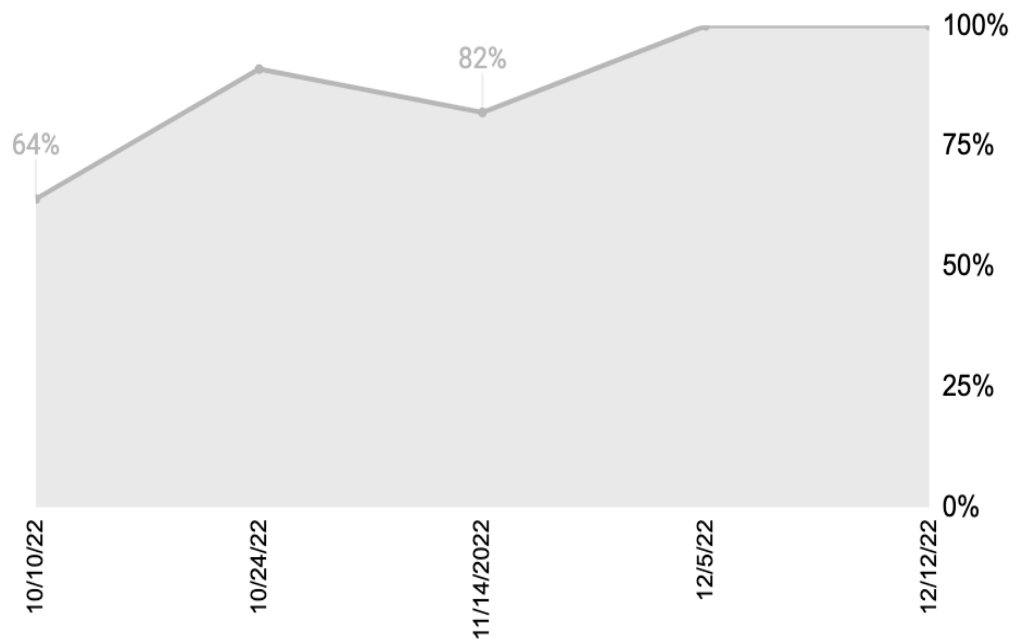
Figure 6

Pleasantness Likert Scale (Exit Survey)



Huddle Attendance

The department leader directed all team members to be in attendance; however, scheduled nonduty days or illness were two factors that affected participant attendance (see Figure 7).

Figure 7*Team Huddle Attendance***Cycles of Analysis and Implementation**

All survey data collected were quantitative values; however, I did collect team huddle plus/delta data after each gathering as a method of closing the feedback loop and improving processes in the five team huddles (see Table 3).

Table 3*Team Huddle Plus/Delta Data Table*

Huddle date	Plus feedback: What went well?	Delta feedback: What could improve?
10/10/2022	<ul style="list-style-type: none"> ● It was a good start to the day. ● Organized, prepared in advance. ● Seeing everybody 	<ul style="list-style-type: none"> ● Missing the whole team

Huddle date	Plus feedback: What went well?	Delta feedback: What could improve?
10/24/2022	<ul style="list-style-type: none"> ● Loved seeing everyone. 	<ul style="list-style-type: none"> ● Include time for department announcements. ● Send a reminder on Friday afternoons for Monday huddle.
11/14/22	<ul style="list-style-type: none"> ● Email reminder on Friday. ● Good start to the week 	<ul style="list-style-type: none"> ● Need the same room if possible for huddles. ● Maybe we can meet in our open table conference space?
12/5/22	<ul style="list-style-type: none"> ● Monday huddles give us a jump in the week. 	<ul style="list-style-type: none"> ● Monday huddles are difficult. ● Consistency in room would help
12/12/22	<ul style="list-style-type: none"> ● Starting off the week together even though everyone is busy. ● Appreciate getting to know each other better. ● We were able to focus on individual goals and the group goal. ● Huddles help focus on ourselves. ● I know where I am at ● It helps not having to bring anything with me (devices or writing utensils) ● 30 minutes feels right. ● The structure is helpful. ● The extension of the last huddle to a holiday party was a nice segue way ● We took what we did with the [Appleworks department retreat in September] and picked back up on it which was valuable. ● The pace of twice a month ● We haven't had a department staff meeting since October, and team huddles helped us stay connected. ● The morning is better versus an afternoon. ● There is something valuable about knowing what my teammates feel is top of mind 	<ul style="list-style-type: none"> ● 8:15am start time can be rough, but the alternative of a later time would be more difficult. ● Mondays are hard because of scheduled vacation days. ● Having additional 3-minute department updates might feel more valuable to content

Huddle 1 feedback was positive with an appreciation for the manner in which they started the workday and having a structure that was prepared in advance. One delta surfaced around attendance and the identification that the whole team was not gathered. Huddle 1 held the lowest

attendance of all five huddles, with 64% present. I made no changes to the format after the first huddle.

Huddle 2 feedback showed a similar appreciation for seeing one another with two deltas that focused on a request for an email reminder the Friday afternoon before the huddle meeting and an additional space for team members to share department updates. I worked with the department leader to request an additional email reminder, and the agenda was modified in time to reflect a change to include 3 minutes of department updates in the third huddle.

Huddle 3 feedback showed praise for the email reminder and happiness about the huddle being a good start to the week. Attendance increased to 82% for the third huddle, although there was some confusion about the location because it was in a different conference room than the first two huddles, so two individuals were a few minutes late. This occurrence was reflected in the deltas with a request for the huddle location to stay consistent along with a suggestion of the open conference table in the middle of the Appleworks department cubicle stations. I was not able to make changes to the huddle locations because there was not an empty conference room. Additionally, I considered the open conference table; however, due to the content prepared for the remaining huddles, I decided not to make that change to maintain the privacy of a closed-door space. I did change the location of the meeting to boldface type in both email reminders and included the location in the calendar invitations.

Huddle 4 was canceled due to holiday plans and the illness of many team members. Initially, the department leader thought to reschedule, but because of an impacted calendar, limited space to meet, and upcoming winter break, they ultimately determined not to create another meeting and plan to proceed with the fifth huddle. Instead, I created some tangible

documents, which provided the Appleworks team with some resources in lieu of the huddle time so we did not completely skip the content.

Huddle 5 had perfect attendance. Because of the canceled huddle the month before, I shared a 3-minute review of content provided during the fourth huddle. A participant shared one plus feedback at the conclusion—an appreciation for the “jump in the week”—and a contradictory delta was expressed, stating Monday huddles were difficult. An additional request was made about the consistency of location because the current huddle was not held in the same the conference room as the third huddle. I made no changes based on this feedback.

Huddle 6 was the Appleworks department’s final team huddle. Again, all 11 team members attended for perfect attendance. Structurally, the huddle began as normal at 8:15 am; however, instead of concluding at the scheduled time of 8:45 am, the department leaders agreed to hold a breakfast potluck holiday party immediately after until 10 am. Although this fifth huddle ended on time, several team members requested the structured time go longer so they could have a full debrief in an effort to inform a future practice of team huddles in the spring. Therefore, the huddle meeting concluded 17 minutes later. Participants shared many plus feedbacks with themes of appreciation of time well spent getting to know one another and working on individual growth and goals. Participants shared technical feedback, such as the 30-minute structure worked in a twice-a-month format. In the department of all 11 team members, there was a great discussion about finding a different day of the week as an alternative to Monday, with no concrete solutions. The team had a conversation about the time of 8:15 am being too early to hold a huddle; however, they ultimately agreed any later in the day would negatively impact their calendars and appointments. They discussed location and acknowledged that given the overall personal content expressed during the huddles, there was a need for privacy

and an open forum would not have felt comfortable. Given the nature of future huddles focused more on technical content, the team expressed the opposite need for privacy and that the open conference table would be sufficient for team huddles in the future. The huddle structure received recurring praise as team members did not have to prepare or bring anything with them. Overall, team members shared a consensus of praise for the time they had to get to know one another on a more personal level and the appreciation for having a space to work on well-being in a work environment.

CHAPTER 3

Discussion of Findings

The literature I reviewed in this dissertation study highlighted the benefits of cultivating adult well-being (Terroba, 2021) and a call to action for reinforcing this structure in the workplace (Barrett & Joseph, 2021). Furthermore, by systematically promoting well-being strategies in workplace environments, educators can fight against burnout and decrease attrition rates (Weiland, 2021). The Appleworks department had not used team huddles as a facilitated learning space prior to this research study. A structure like team huddles allows an environment for the team to work collaboratively and build a base for teamwork that promotes solving problems and opportunities for positive decision making (Markey, 2015). A great amount of research has referred to the positive outcomes of team huddles in medical organizations (Eguia et al., 2022; Rowan et al., 2022; Zhu et al., 2020); however, there has been little evidence this strategy can be beneficial in an educational setting. The implementation of team huddles aligned with the Appleworks department's desire to improve their communication strategies in a greater effort to respond to the department's difficulty with holding hard conversations and operationalizing organizational values. Because people in the department valued the model for continuous improvement (Bryk et al., 2017), the leader desired to practice disciplined inquiry by incorporating team huddles into a systematic routine and testing its impact.

One limitation of this dissertation study was the frequency of team huddles of 2 times per month. One study in the literature review suggested huddles could be held weekly or even daily for a short period of time (Shaikh, 2020). Shaikh (2020) suggested huddles should be no more than 10–15 minutes in length. This opportunity of a short time together offers a more feasible schedule. Based on the plus/delta feedback and mood meter data I received during two separate

huddle meetings regarding Monday morning team huddles, I learned that holding a huddle at the beginning of the work week was difficult for employees. The mood meter data also accounted for some lower energy and lower pleasantness of descriptive words from participants in the blue quadrant—an average of 16.6% of the time in a range from 9%–22% over the five huddles. Words participants used to describe their mood at the conclusion of team huddles were “tired,” “fatigued,” “alienated,” “apathetic,” and “drained.” Similarly, team huddle participants used lower pleasantness and higher energy words from the red quadrant the least. Therefore, I wondered if the words “annoyed,” “nervous,” “repulsed,” and “restless” could be attributed to a feeling of discontent with a Monday morning meeting.

Discussion of Quantitative Findings

The pre- and post-intervention survey supported a metric that was needed to address the primary driver of mental health and well-being. This driver connected further to five secondary drivers that consisted of spaces and environments in which mental health and well-being can be addressed; these secondary drivers were (a) team building activities, (b) intentional staff well-being, (c) mindfulness practices, (d) team huddle structures, and (e) making 1:1 connections. The secondary driver of team huddles was the specific change idea I tested in the scope of this improvement research study. To gather a metric that was connected to team huddles and supported the primary driver of mental health and well-being, it was important I ensured the content of the agenda included attributes that connected to a type of intentional well-being activities. Participants made intentional connections in huddle activities, specifically with the welcoming rituals from the Collaborative of Academic and Social Emotional Learning (CASEL, 2019). The postintervention data suggested there was a greater decrease of answers in 7 of the 11

self-care survey questions, which meant participants answered they felt less likely to do that specific self-care ritual well.

An interesting piece of data to reflect upon was the lack of answers I received regarding the question mark for areas in which the participant had never thought about including in their self-routine at the workplace. Because the response was a question mark, it did not contain a numerical value. In the preintervention survey, a total of 10 question mark answers were given out of a total of 121 opportunities for a numerical value; in other words, 8.30% of the responses were question marks and signified the participants had not given this strategy consideration as self-care at the workplace option. With the postintervention survey results, the response totals decreased to 4 out of 121 opportunities with a total of 3.31% of questionable responses to the self-care areas. This reduction from 8.30% to 3.31% signified participants developed an awareness for self-care strategies. Participants answered the question of having a support group multiple times with a question mark in the preintervention survey. In the postintervention survey, the responses decreased numerically in the overall average, and there were zero questions about this being a self-care strategy that could be implemented in the workplace. These data suggested improvement was growing in the area of identifying self-care strategies in the workplace.

Discussion of Plus/Delta Feedback

I incorporated facilitating plus/delta feedback into each closing of team huddles with all participants. On the fifth and final huddle, I increased this intentional time to share feedback to meet the department team members' request because they felt the data were useful in synthesizing next steps for future huddles. I used plus/delta information to learn what went well in the meeting; the things that went well were coded as a plus, and what could be improved were coded as a delta (Cheng et al., 2021).

It should be noted one positive piece of plus feedback I received repeatedly was participants' appreciation of having time together to launch the day and week for all five huddles that were scheduled for Monday mornings. This feedback contrasted the delta feedback I received in 2 of the 5 huddle meetings of disliking Mondays as the meeting day. With this information, I found team huddles were useful in launching the day; however, perhaps Monday was not necessarily the best day of the week to hold the team huddle.

In 60% of the team huddles, participants shared appreciation for the explicitly intentional structure and organization of the meetings. One participant's delta feedback contrasted this feedback during the final huddle date by conveying a desire for an additional 3-minute department update section of the agenda. Using research from Boudett and City (2018), I reformatted the agenda template to intentionally include a department update component to the huddle agenda, either in its own independent segment or woven into a SEL 3 Signature Practice (CASEL, 2019) activity.

A participant shared a delta in 1 of the 5 huddle times that described a need for calendar reminders. That change was implemented in the following three huddles. Finally, a participant shared a delta about the team huddle location with a request that the location stay consistent because it varied for 4 of 5 huddle meetings. One location option was the conference table area that was centrally positioned in the middle of all Appleworks cubicles. This space may be a possible environment dependent on the content of team huddles. However, due to the nature of open spaces, participants may not wish to share or participate fully with the fear of neighboring listeners.

On the fifth and final huddle date, there was a large increase of plus feedback. Participants shared 14 plus comments in comparison to one, two, and three plus comments in

prior huddle meetings. Participants shared a variety of appreciative comments ranging from structural agenda components to value in the content, to individual celebrations and praise for the entire Appleworks team. Participants shared specific feedback that could inform next steps, including that it was beneficial for participants to simply show up to the huddle without needing to bring any supplies with them. Everything they needed for the space had been prepared in advance for them. Participants valued the rhythm of meeting together frequently, even though the time was limited to 30 minutes or less. Finally, even though the content was not directly related to the scope of the Appleworks department's work, taking the time to explore individual personalities and strengths, and connecting with one another proved beneficial based on several plus points of feedback.

Implications and Recommendations for Practice

Improvement science in practice as a dissertation methodology offers a chance for researchers to try a variety of change ideas within a theory and deliver some immediate data to the reader. Within this research study there were several learning opportunities that offer further implications and recommendations for future practices.

Moving forward, the facilitator should calendar all team huddles well in advance and notify all team participants with a formal calendar invite. The location of the team huddle should be included in each invitation, even if the location stays the same, so this information is clearly communicated. A time should be set aside to incorporate shared learning for department updates. Regardless of the content, the facilitator should create an agenda that does not require participants to bring tools of any kind, so participants are able to show up as they are and participate fully. The agenda should include a focus and goal that aligns with the entire department with connections to self. The SEL 3 Signature Practices from CASEL (2019) should

be included in each huddle with intentional activities that include a welcoming ritual, engagement strategies embedded throughout, and an optimistic closing at the end of the structured time together. Finally, no team huddle should ever exceed 30 minutes in time from start to finish. By using the Meeting Wise (2018) template, the facilitator could use of a predesigned agenda (Boudett & City, 2018).

One of the six core principles of improvement developed by the Carnegie Foundation for the Advancement of Teaching (2016) addressed how to conduct a disciplined inquiry to hone increased desired results (Bryk et al., 2017). In this study, overall evidence showed the team huddle members' moods improved by 25% in the scope of this 3-month investigation; however, some qualitative data from the plus/delta portion of the team huddles could be used for future testing of the team huddle structures moving forward. Small changes that could be addressed might be changing the day and time of the team huddles to test the variable impact of Monday mornings and how they relate to the department employees' moods by using all the same meeting structures with a time allotment and content for the participants. The space in which the team huddles are conducted could also be revised to be in the same location each time.

I recommend following up with lower energy or lower pleasantness participants with a question about their mood to describe the meeting structure itself or whether there were outside factors that played significance in their feelings about the team huddle. I am also curious to find out more from higher energy and pleasantness participants about a more in-depth cause or reasoning behind their uplifted mood at the conclusion of the team huddle. This questioning could look similar to those questions asked during the exit survey for the original research study with questions in Part 2 questions directed to participants to share why they specifically used their chosen feeling word.

The research surrounding the impact of team huddles has been clear about the intentionality of the purpose of gathering team members together (Insights, 2016). The cycle of team huddles in this study was conducted over a span of 3 months, with content focused intentionally on deeper understanding of the Meyers-Brigg Type Indicator (MBTI) and how each department member's four-dimensional personality type connected to their work as individuals and as team members. The plus/delta feedback that participants relayed at the end of the team huddle cycles celebrated individual learning to better understand their peers. Regarding next steps in the Appleworks team's engagement of team huddles, it would be beneficial to continue to connect their understanding of differences by celebrating them in the context of the team huddle agendas. This action could respond to participants' postintervention survey data that focused on peer support groups, which showed the largest decrease in a self-care behavior in the workplace across all 11 questions. Elevating opportunities for the team to connect and draw on one another would be important moving forward with a team huddle structure that fosters safe conditions in which the team members can share and stay connected (Squires et. al., 2022).

Creating a space for equitable sharing is also encouraged (Squires et al., 2022). One of the team huddle components I intentionally designed was an opportunity for everyone to share out loud. This was done in two ways at each huddle. The first opportunity for team members to individually express themselves was in a structured welcoming ritual activity as part of the SEL 3 Signature Practices (CASEL, 2019). On some occasions, individual sharing was done in dyads or triads and sometimes participants shared with the whole group. The second opportunity for expression was with the whole group at the conclusion of each huddle when each team member shared their next step for the week. This structure allowed every team member to articulate the person on the team with whom they would be connecting and why. This optimistic closing

activity, also taken from the SEL 3 Signature Practices, “encourages participants to make a commitment to action in the near future” (CASEL, 2019, p. 40). Additionally, this activity allows individuals to focus on both their self-awareness and self-management competencies from the CASEL (2019) competencies.

A second core principle of the Carnegie Foundation for the Advancement of Teaching (2016) improvement paradigms the collaboration of other networks for improvement. Once the Appleworks department has secured consistent implementation of team huddles and sustained an improvement rhythm, they could benefit from collaborating with neighboring branch departments. This collaboration would require other departments similar in their structural design to implement team huddles and apply disciplined inquiry as part of the improvement research that Bryk (2020) supported. With a neighboring department that applied the same change package from the theory for improvement, the Appleworks department could learn from a separate application of improvement and determine if any changes should be made to their improvement process of team huddles through “coordinated, collective action” (Bryk, 2020, p. 12).

The sixth core principle of the Carnegie Foundation for the Advancement of Teaching (2016) improvement paradigm emphasized the organization with spread and scale of networks. In the Appleworks department, “scaling the network” could mean significant improvement would have been made and evidence may be seen in the instruments used in this research study and the department internal surveys that are completed annually. Additionally, any internal organizational data from the Orange Blossom Educational Institution (OBEI) would demonstrate improvement metrics after full implementation was conducted in the Appleworks department and its neighboring branch departments.

There are multiple ways to spread and scale the change idea of team huddles. The spread efforts would come from the branch departments to other divisions outside of the Appleworks branch. One method of implementation would appear as if multiple departments across the organization conducted structured team huddles with the same agenda formats and intentional design. An example of scaling the efforts of the improvement theory would be taking the improvement design to external partners of OBEI. Because the institution supported 43 local educational agencies in its geographical boundaries, there are many avenues through which the team huddles may be facilitated and replicated externally. Similar to how internal departments could spread the improvement method, team huddles could be facilitated in the school districts and modeled as an explicit and intentional strategy of building communication and trusting relationships in educational communities.

I was very curious about the day of the week team huddles occurred and their frequency. I wonder about the impact of increasing the frequency of huddles as a weekly occurrence based on positive outcomes yielded from other industries; I would want to implement this change on a very small scale first and measure the results with the same mood meter survey data. Additionally, I would recommend using a qualitative data survey to discover more about why participants felt the way they did at the conclusion of team huddle meetings. It would be important to do so in a noninvasive and structured format that allows participants to continue to respond anonymously. I am curious to know if outside factors affected the participants' moods or if the structure itself contributed to their energy and pleasantness levels.

Because the research study originated from the two areas upon which the Appleworks department wanted to improve—"avoiding hard conversations" and "operationalizing organizational values"—I further recommend the Appleworks department should intentionally

connect team huddle content to activities that can improve those two areas. It would also be beneficial to measure communication health and use of core values with the Appleworks team to have an additional method of measuring improvement.

Concluding Remarks

Although the practice of improvement science has been used for decades (Bryk, 2020), the methodology used in this doctoral dissertation work was a newer practice at George Fox University. John Hopkins began using the structure in its doctoral programs in 2012 in an effort to see the EdD program “[evolve] to be more integrated and coherent, more contemporary, and more relevant to the authentic work of those involved in an array of education-related endeavors” (Pape et al., 2022, p. 60). With the structure of continuous improvement comes an intentional component of seeing the system and learning about the multifaceted angles in which it delivers the results. Pausing with a systems investigation allows an opportunity to take time to discover, lean into inquiry, build a theory, and try a change idea to make an impact on the overall system (Bryk et al., 2017).

In the case of this dissertation research study, attrition rates have been an overarching problem that have affected educators for years (Madigan & Kim, 2021). There are many root causes of attrition rates such as burnout and stress (Squires, 2019), numerous burdens from the COVID-19 global pandemic (Will, 2021b), teaching credentialing roadblocks (Park & Choi, 2009), family reasons, and higher salary needs (Chuong, 2008). Additionally, lack of quality administrative leadership (Grissom, 2011; Mouw et al., 2021; Walker, 2009; Weiland, 2021) has been a common contributing factor for educators leaving the field, which has caused researchers to wonder how to solve this ever-growing problem (Will, 2021b). Through more in-depth research, I found contributing factors have helped support teachers and administrators in their

craft and data have suggested there is a possible avenue to reverse attrition rates in the education field. I created a theory for improvement from the review of literature; thus, change ideas could be explored in testing a theory with a small scaled disciplined inquiry cycle for improvement.

With a foundational belief that staff well-being and connection are at the root of successful strategies, I believe using these strategies to cultivate social and emotional skills for adults in an educational organization may be the angle to find improvement to a greater system. I have used team huddles as an improvement strategy while coaching improvement teams by implementing a way to conduct short check-in meetings for progress. While coaching teams through the COVID-19 global pandemic, I found it was more effective to conduct the team huddles when I began with a warm-up activity and checked in with the team. By using this practice and refining the huddle agenda with researched-based practices such as CASEL (2022) strategies, I developed a change idea and tested it with the Appleworks department to improve the department's aim related to establishing trusting relationships.

From this dissertation study, I learned intentional design of an environment can indeed improve collaboration efforts and overall mood in a team space. I also learned adults value learning about themselves and each other, and they appreciate when their time is facilitated for them. I wonder what the greater impact of these strategies could be if they went beyond the scope of the department and spread out to the entire branch. I theorize integrating team huddle methods in teams I coach outside of the organization would have a stronger sense of collaboration, sense of belonging, and connection to the improvement work of which they are a part if I can facilitate agendas that include the CASEL (2019) strategies.

The next step to spread and scale efforts from this research study is to use a networked improvement community. The networked improvement community forum would allow a

community of improvers to share learning and deeper inquiry around this improvement study. I hope the 11 team members from the Appleworks department take their learning from the team huddle activities and continue to focus on their self-care and well-being in the workplace. I expect they gained curiosity from the 11 questions and these areas have improved their personal lives so they feel more self-aware, experience an increase in self-management, and decrease their overall stress levels. Through the Appleworks participants' learning about themselves and their celebration of their individual diversity, strengths, and skills, I hope this discovery continues to prompt them to have more collaborative discussions and interactions with each other in the department. Finally, I hope this practice to continue and improve will not only take place in their team space, but also it would be scaled throughout the organization and to the 43 local educational agencies they serve so more educators can build awareness of the impact of team huddles in their institutions and experience true connectedness, collaboration, and learning.

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APPENDICES

APPENDIX A

GFU LETTER OF CONSENT/IRB APPROVAL

2221007

Title: *Building Relationships through Team Huddles*

Principal Researcher(s): Jennifer L. Biagio-Patterson

Date application completed: July 31, 2022

5

GEORGE FOX UNIVERSITY HSRC INITIAL REVIEW QUESTIONNAIRE

(The researcher needs to complete the information above on this page.)

COMMITTEE FINDING:

☒ (1) The proposed research makes adequate provision for safeguarding the health and dignity of the subjects and is therefore approved.

☐ (2) Due to the assessment of risk being questionable or being subject to change, the research must be periodically reviewed by the HSRC on a basis throughout the course of the research or until otherwise notified. This requires resubmission of this form, with updated information, for each periodic review.

☐ (3) The proposed research evidences some unnecessary risk to participants and therefore must be revised to remedy the following specific area(s) on non-compliance:


☐ (4) The proposed research contains serious and potentially damaging risks to subjects and is therefore not approved.

  _____ Chair or designated member Date

APPENDIX B

EXAMPLE OF TEAM HUDDLE AGENDA

MONDAY LAUNCH TEAM HUDDLE

Huddle Date: 11/7/22		
30 mins	Huddle Protocol	Notes SLIDE DECK
1 min	Agenda this morning <ul style="list-style-type: none"> - Opener- What is Top of Mind - Learning more about our MBTI - Weekly Connection 	Total Number in attendance
	Goals of the Huddle <ul style="list-style-type: none"> • Kickstart the week together • Build community • Build social-emotional wellness 	
3 min	Welcoming Ritual: “Top Of Mind” Think about an EVENT you have this week that is top of mind for you. Whip around and share what that EVENT is in 1-3 words MAX. This helps others in LSS be aware of some big ticket items this week and also allows your teammates to see what is heavy on your mind in priority (empathy).	
10 min 2 set up 8 team	ACTIVITY: Let’s Create! In Triads (pre-selected)- Take 8 minutes to create a mock flyer for an upcoming event. <ul style="list-style-type: none"> - Each group will draft a flyer sketch encouraging people to visit a local event or attraction at TCOE. - The advertisement must entice the other groups to visit the event. 	
7 min	Engagement Activity: MBTI: S’s and N’s <ul style="list-style-type: none"> • Sensing and Intuition (4 mins overview) • Poster Share Out (1 min per group) • Make the connections to the poster to S & N traits 	
2 min	Optimistic Closing: My Next Step <ul style="list-style-type: none"> • WHO: Name one person here you will connect with this week • WHAT TOPIC: In 1-3 words MAX, what is the topic you will connect with them on? • EXAMPLE: “Marty ... MSC Newsletter proofread • Whiparound Quickly 	
2 min	Team Huddle Feedback Survey: Please answer two questions on the survey https://forms.gle/yCqTqiPpwu9uvjEG6	
3 min	LSS Updates - for the good of the order	
2 min	Huddle Process Plus/Delta	

APPENDIX C

PRE- AND POST-SURVEY SELF CARE AND WELL-BEING IN THE WORKPLACE

Self-Care Assessment

The following survey for assessing self-care is not exhaustive, merely suggestive. Take particular note of anything you would like to include more in your life.

Rate the following areas according to how well you think you are doing:

- 3 = I do this well (e.g., frequently)
- 2 = I do this OK (e.g., occasionally)
- 1 = I barely or rarely do this
- 0 = I never do this
- ? = This never occurred to me

Workplace or Professional Self-Care

- ____ Take a break during the workday (e.g., lunch)
- ____ Take time to chat with co-workers
- ____ Make quiet time to complete tasks
- ____ Identify projects or tasks that are exciting and rewarding
- ____ Set limits with clients and colleagues
- ____ Balance my caseload so that no one day or part of a day is "too much"
- ____ Arrange workspace so it is comfortable and comforting
- ____ Get regular supervision or consultation
- ____ Negotiate for my needs (materials, resources, professional learning)
- ____ Have a peer support group
- ____ Develop a non-trauma area of professional interest

[Google Form Link](#)

Reference:

Adapted from Saakvitne, Pearlman, & Staff of TSI/CAAP (1996). *Transforming the pain: A workbook on vicarious traumatization*. Norton.

(Retrieved on 7/15/22 from *Reunite, renew, and thrive: Social and emotional learning (SEL) roadmap for Reopening School*. CASEL. (2021, August 23). <https://casel.org/casel-gateway-sel-roadmap-for-reopening/> adapted by Jennifer L. Patterson, a doctoral student.

APPENDIX D

POSTHUDDLE FEEDBACK SURVEY

Post Huddle Feedback Survey

Please complete both questions. Your answers are anonymous and will not be shared during the study.

All data will be summarized at the conclusion of the study and shared as whole team data.

MOOD METER

How are you feeling?



As you leave this Team Huddle, what is ONE word to describe how you are feeling:

Scale of Pleasantness

Using this scale, rate your PLEASANTNESS:

