

TEAM DEVELOPMENT CHECKLIST

Preparation

- ❑ Define the Team charge/purpose.
 - What do we want to accomplish?
 - What are our deliverables?
 - What is the timeline for completing tasks?
 - What resources are available to support the effort?
 - What is the context surrounding this effort?
(e.g. policy restrictions, environmental or political concerns)
- ❑ Determine Team composition. Make sure that selected members have the knowledge and skill to complete each task.
- ❑ Gather data and information needed to inform the effort.
- ❑ Draft a Team Charter articulating the group purpose, role, level of commitment, scope of effort, and intended outcomes.

Groundwork

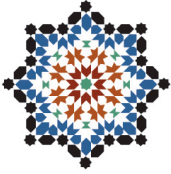
- ❑ Provide team members with the charter to confirm their commitment.
- ❑ Offer and distribute background materials.
- ❑ Organize and hold the initial meeting.

Organization (Within Team)

- ❑ Review the Team Charter.
 - Define structures, responsibilities, and roles of membership and leadership.
 - Clarify and agree on the deliverables and the scope of the effort.
 - Revise and finalize the charter based on group input.
- ❑ Establish guidelines for dialogue and decision making processes.
- ❑ Create action plans for achieving the deliverables that include timeframes and evaluation measures.
- ❑ Determine process for creating and distributing the meeting records.

Maintenance

- ❑ Hold regularly scheduled meetings—don't let competing priorities alter / change your meeting times.
- ❑ Set intended outcomes for each meeting.
- ❑ Ensure agenda offers discussion of timeframes.
- ❑ Send the meeting reminder, agenda, and background materials to members at least a week ahead of time. Include records/minutes of the previous meeting.
- ❑ Recognize member contributions and Team progress.



Assessment and Evaluation

- ❑ Evaluate progress toward achieving deliverables and completing action plans.
- ❑ Make mid course corrections to the action plan based on these assessments.
- ❑ Celebrate accomplishments.
- ❑ Write up and disseminate results to all members.

Team Meeting Process Guidelines

At the beginning of each meeting:

1. Review the intended outcomes, agenda items, timelines, and guidelines for dialogue.
2. Ask for member input to the agenda.

During the meeting:

1. Utilize facilitation techniques and participatory decision-making approaches.
2. Hold to the timeframe and stay focused. Keep people on task—make sure all voices are heard.
3. If decisions can't be reached within the given timeframe:
 - Defer the discussion to the next meeting.
 - Extend the discussion and reprioritize your agenda.
 - Examine factors contributing to the group's inability to reach closure and address those barriers. Some barriers may include: insufficient information to make a decision, unresolved underlying issues, stagnation or overinvestment in tangential elements of the decision.

At the end of each meeting leave time to:

1. Review meeting accomplishments.
2. Identify agenda items, handouts, and work processes for the next meeting.
3. Delineate tasks, responsibilities, and timelines.
4. Clarify the next meeting date, time, and location.