THE TEAM CHECKLIST

This tool contains a checklist to use in establishing a successful team. It includes the team's purpose, norms of behavior, measures of success, team roles and responsibilities, and operating rules. This is a very useful tool for new teams, as well as for teams that are searching for a renewed sense of purpose.

The Team Charter

Successful teams have five things in place:

1. A clear sense of purpose
2. Well-understood norms of behavior
3. Measurable success indicators
4. Clear roles and responsibilities
5. Operating rules

These are often incorporated into a team charter – a single document in which all five elements are written down.

Use this checklist to ensure that you've established all five elements on your team.

Using a qualified facilitator will help everyone take part and ensure team buy-in for each element of the charter.

1. Team Purpose

The first part of the meeting should be devoted to answering these questions:

- Why was this team put together in the first place?
- What is the fundamental purpose or mission of the team?
- What are the goals of the team?
- What else does the team want to achieve?
- What will the team be called?

2. Team Norms

Team norms are the behaviors expected of each member of the team. Identifying them explicitly is critical to making the team function effectively.

- What are the values of the team? (Ask team members to identify the behaviors they would consider essential to team success.)
- How will we make decisions? (Recommended tool: "Decision making types")
- How will the team members support and interact with one another?
- What will our meeting ground rules be? (Recommended tool: "Ground rules for productive conversations.")

3. Success Indicators

Next we want to look at how the team will measure its success. Ask the following questions:

- What outcomes does the team want to achieve?
- How will the team know it is successful? (What measurements will it use?)
- How will it evaluate the progress it is making?
- How will the team recognize one another and celebrate it successes?
- How will the team deal with poor performance?

4. Team Roles

Team roles should focus on decision making. Ask the following questions:

- What is the typical mode of decision making for this team?
- Who's responsible for clarifying the decision-making roles of the team and of team members if we're unclear?
- Is someone on the team responsible for managing each major decision?
- How much authority does the team have to make decisions by consensus?

5. Operating Rules

Operating rules should define the way the team manages its meetings. Ask the following questions:

- How often will the team meet?
- How long will the team meet?
- Who facilitates the meeting?
- What kind of agendas do we want? How will we build agendas?
- How will we evaluate our meetings/actions?
- What kind of meeting notes do we want?
- To whom are the notes distributed?
- When are the notes distributed?
- How else will we communicate after the meeting?
- How else will we manage our meetings?

Next Steps

- Write down the team's commitments in a charter. Distribute the charter to every team member.
- Regularly review these commitments (at least twice a year). Ask the team: "Are we doing what we said we would?"
- Follow up in any areas where the team feels it needs to strengthen its commitments.