



District  
Management  
Group

## MANAGER'S TOOLKIT

# Establishing and Managing Effective Teams

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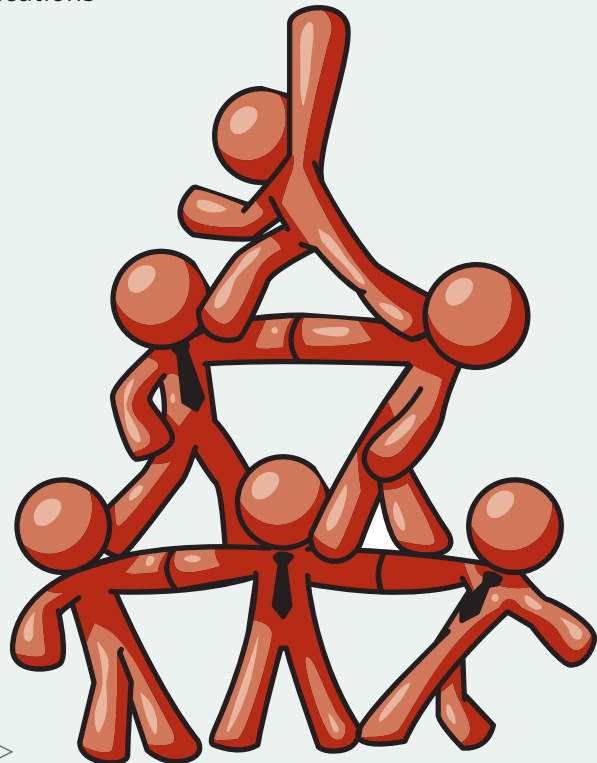
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## Establishing & Managing Effective Teams

The following tools are intended to help you increase the effectiveness of your teams by using the three levers discussed in the Spotlight article: improving team structures, procedures, and behaviors.

The tools are designed to support conversations that:

- Assist in team design around a common purpose
- Select team members for specific roles
- Manage processes and deliverables through a SMART goal format
- Run meetings and ongoing communications with increased efficiency



*Turn the page for your DMC Toolkit* >

# Establishing & Managing

## TEAM CHARTERS:

### Defining the Team and How it Works

Teams should develop a charter—a 1-2 page document following the structure below—that provides a common identity and mission for the team, as well as a valuable communications and process management tool.

**Team Name:**

**Team Members and Roles:**

|   | Team Member Name | Specific Role (if applicable)<br>(e.g. data analyst and team energizer) |
|---|------------------|---|
| 1 |                  |   |
| 2 |                  |   |
| 3 |                  |   |

**Problem and Context:** *(description of why we are here)*

**Mission/Objective:** *(description of what we hope to accomplish)*

**Goals:** *(specific outcomes we will achieve, articulated as SMART goals)*

|   | SMART Goals (Goals should be outcome oriented; goals should not be activity oriented (e.g. gathering input, writing a report). Goals need to be SMART: <u>S</u> pecific, <u>M</u> easurable, <u>A</u> ggressive yet <u>A</u> ttainable, <u>R</u> elevant, and <u>T</u> ime-bound.) |
|---|--|
| 1 |  |
| 2 |  |
| 3 |  |

**Timeline & Deliverables:** *(major activities & timing)*

|   | Activity | Deliverable | Timing/Deadline |
|---|----------|-------------|-----------------|
| 1 |          |             |                 |
| 2 |          |             |                 |
| 3 |          |             |                 |

**Operations Notes:** *(meeting times, expected agenda, communications planning)*

# Effective Teams

## MEETING MANAGEMENT:

### Building Mutual Accountability for Teams

Use this Meeting Management tool to organize your meetings around specific objectives, track key decisions made, and agree on and communicate next steps. The tool should be used at the next meeting to review progress on the tasks.

#### Meeting Agenda:

|   | Agenda Topic | Today's Meeting Objective |
|---|--------------|---------------------------|
| 1 |              |                           |
| 2 |              |                           |
| 3 |              |                           |
| 4 |              |                           |
| 5 |              |                           |

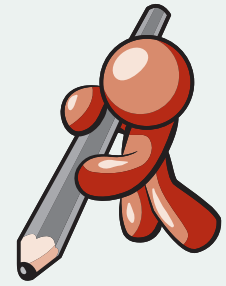
#### What decisions were made? *(read this list aloud before the meeting ends)*

#### Next Steps: Who's going to do what? *(start with a recap of this during your next meeting)*

|   | Task | Person Responsible | Timing/Deadline |
|---|------|--------------------|-----------------|
| 1 |      |                    |                 |
| 2 |      |                    |                 |
| 3 |      |                    |                 |
| 4 |      |                    |                 |
| 5 |      |                    |                 |

# Establishing & Managing Effective Teams

## "HOW DID YOUR MEETING GO?": Managing Processes & Enforcing Norms



Use this **Effective Meeting Diagnostic** to complement the meeting management tools. Rate yourself as a leader or as a participant on key measures of meeting performance, and discuss the results as a group to plan for improvement.

| As the <b>leader</b> , I:  | Rating<br>5=good, 1=bad | Comments |
|--|-------------------------|----------|
| Prepared for the meeting   |                         |          |
| Started on time  |                         |          |
| Stated the meeting's purpose                                     |                         |          |
| Shared the agenda  |                         |          |
| Established, followed, and enforced ground rules                 |                         |          |
| Encouraged participation by 100% of the team members             |                         |          |
| Encouraged ideas shared in private to be voiced to the full team |                         |          |
| Remained focused on the task                                     |                         |          |
| Clarified next steps in writing, specifying roles and timelines  |                         |          |
| Ended on time  |                         |          |

| As the <b>participant</b> , I:                     | Rating<br>5=good, 1=bad | Comments |
|--|-------------------------|----------|
| Prepared for the meeting                           |                         |          |
| Arrived on time                                    |                         |          |
| Understood the meeting's purpose                   |                         |          |
| Understood the agenda                              |                         |          |
| Helped establish, follow, and enforce ground rules |                         |          |
| Participated and encouraged others to participate  |                         |          |
| Listened to others' ideas                          |                         |          |
| Remained focused on the task                       |                         |          |
| Agreed on next steps, roles, and timelines         |                         |          |