Step 1: Identify Your Leadership Team

A leadership team is a group of individuals, each of whom is responsible for leading some part of the team's purpose, and who are interdependent in providing overall leadership to the overarching enterprise.

Related to your quality improvement work, think of a leadership team that you formed or are a member of. Please answer the following questions:

(1) What is the name of the team?

(2) List the names and main organizational affiliations of the team's core members:

Step 2: Diagnose the Effectiveness of Your Leadership Team

Complete the Diagnostic Checklist (below) to determine whether your leadership team has the conditions in place to work together as effectively as possible, and how it could improve.

How to Use the Diagnostic Checklist

Although we ask you to complete the Diagnostic Checklist individually, please note that it is designed as a teamwork activity. It can be completed at the beginning of the life of a group to help it get off to a good start by addressing any missing key components and at various points throughout the group's lifecycle to assess and improve performance.

The checklist is organized into three sections: (1) A Real Team With The Right People; (2) Compelling Purpose; and (3) Enabling Structure. Section 1 asks you to look at the team as a whole and evaluate how it works together. Section 2 assesses the degree to which the team's purpose engages members' motivations and orients them in a common direction. Lastly, Section 3 evaluates the effectiveness of how the group makes decisions and adheres to team norms.

Assess the leadership team's design.
Move through the checklist by starting in the middle column of each section. For each statement in a section, assign a grade (A, B, C, D, or F); for example, you might assign an "A" to the first statement, "The team is bounded." The grade you assign to some statements might be clear-cut, while the grade for others might require more discussion. You can start with whichever section you choose and feel free to jump around sections; you do not have to complete this in an orderly fashion.

Assign an overall grade.
A team's score for each section is computed by averaging assessment responses for each statement.

Identify and write out steps for improvement.

Once you have computed an overall grade for each section, discuss with your team members how you did. In what areas is your team strongest? What about the areas where you may need to improve? Write down the solutions and next steps that your team can take to improve your design.

As your leadership team grows and evolves, make sure to return to this checklist every so often to ensure that your team remains effective and stays on a positive trajectory over time.

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Grade your team based on the following prompts and answer the reflection questions below:
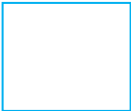
	How is the leadership team's design? A B C D F	How might we improve our design?
A Real Team With The Right People ⬜ Grade Overall	_____ The team is bounded _____ The team is stable _____ The team is interdependent _____ Members have the diversity of roles and perspectives _____ Members have collaborative skills such as empathy and integrity	

(1) Why did you give your team this grade?

(2) What are the barriers to changing the condition?

(3) What do you need to do next to move toward putting this condition in place?

	How is the leadership team's design? A B C D F	How might we improve our design?
Compelling Purpose ⬜ Grade Overall	_____ The team has a shared purpose that is *clear* to all members _____ The shared purpose is *consequential* _____ The shared purpose poses a significant *challenge* that will demand people's best efforts	

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	(1) Why did you give your team this grade?
	(2) What are the barriers to changing the condition?
	(3) What do you need to do next to move toward putting this condition in place?

	How is the leadership team's design? A B C D F	How might we improve our design?
Enabling Structure Grade Overall	____ We have clear roles and responsibilities ____ The tasks we do are real leadership work involving important joint decisions ____ The group has explicit norms of conduct that specify acceptable and unacceptable behavior	

(1) Why did you give your team this grade?

(2) What are the barriers to changing the condition?

(3) What do you need to do next to move toward putting this condition in place?

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Step 3: Design Your Team's Re-Launch Agenda

Like the checklist you have just completed, incorporate components of this template "team launch" agenda as part of a "re-launch" – to enable your team to work together more effectively.

In the column labeled "Have we done this already?" please check the box if you have already incorporated this practice into your teamwork. Then reflect on how you might include (and adapt) these topics in your team's next meeting.

Agenda Design Template
Team Re-Launch Goals
1) Build relationships and shared aspirations among members
2) Identify shared values that can be the underpinning of a compelling, shared purpose
3) Clarify the team's purpose; establish a compelling direction
4) Explore definitions and measures of success for the whole initiative
5) Decide how or whether to expand, reduce, or alter the composition of the team
6) Review lessons from experience about conditions for success and for a great startup
7) Develop initial norms and work practices
8) Surface key strategic questions to guide the work of the group in its upcoming meetings

AGENDA ITEM	TIME	Have we done this already?
Review Agenda and Recruit Note Taker and Timekeeper	3 minutes	☐
Tell Personal Stories • A story from your own history that will teach us something about you aspire to lead this change	3 minutes per person	☐
Establish Team's Shared Purpose	15 minutes	☐
Conduct Before-Action Review (BAR) • What have we learned from prior efforts?	10 minutes	☐
Review the Key Relationships and Capabilities Members Bring • Consider who is not at the table and may be needed	10 minutes	☐
Dig into Key Strategic Priorities	No limit	☐

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Establish Roles and Structure to Support Work of the Group	10 minutes	☐
Establish Norms of Conduct • Make sure to establish a norm for decision making and a way to hold the team accountable (to be revisited)	15 minutes	☐
Clarify Upcoming Priorities and Immediate Next Steps	5 minutes	☐
Evaluate the Meeting: • Key insights, what went well, what will we improve	5 minutes	☐

Reflect On How / Whether To Incorporate Agenda Items Into Team Meetings:

Given the results of the "diagnostic checklist," name the agenda items that would enable your team to function more effectively. How might you incorporate them in an upcoming team meeting?

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