

Effective Team Process Checklist

Team: _____ Date: _____

Meeting Essentials

Components Needed for Effective Teaming

1. Identified roles for facilitator, notetaker, and timekeeper
2. Guiding principles
3. An agenda
4. A medium for taking notes and recording action items
5. Visual organizer and a medium for use - whiteboard or chart paper
6. Meeting mechanics
7. Relevant data

Meeting Practices

Team Behaviors that Improve Meeting Effectiveness

8. Start and end meetings on time.
9. Ensure needed team members are present.
10. Follow established agenda.
11. Establish and rotate roles and responsibilities.
12. Use guiding principles.
13. Take notes and record action items.
14. Use meeting mechanics for problem solving.
15. Establish a decision-making process.
16. Ensure equitable distribution of action items.
17. Data are collected to guide decision making.

Individual Meeting Accountability

Individual Behaviors that Improve Meeting Performance

18. Make attendance at meetings a priority.
19. Arrive on time and stay for entire meeting.
20. Bring new ideas, relevant information and data, and evidence of action item completion.
21. Actively participate and contribute.
22. Seek understanding and presume positive intent.
23. Model and maintain a safe, productive climate for discussions.
24. Be mindful of your own verbal and non-verbal communication.
25. Address guiding principle violations.
26. Use law, research, and data to guide decisions.

GOALS:	ACTION PLAN: