



Tools for Leading Teams

Group-Level Assessment

Introduction

This intervention is useful for involving the team in assessing its own performance or efficiency. While this is a more time-consuming option for the participants than written surveys or interviews, it has the double benefit of getting valid data from the group in real time and affecting immediate change, a technique known as “action research.”

Steps for Success

1. Construct 8-12 open-ended questions that explore the four cornerstones of a team: mission/purpose, roles/goals, processes/procedures, and working relationships. Other categories include: leadership, technology, rewards and recognition, communications, and group norms.
2. Print each question on the top line of individual flip chart pages, making each a “question chart.”
3. Post the question charts around the meeting room prior to the team meeting, but keep them turned over or otherwise hidden until revealed by the facilitator.
4. Outline the process (that follows) to the team so they understand the gist of the exercise.
5. Reveal each question chart and explain the question, answering questions to clarify each
6. Distribute Post-It Notes® to each participant and have them answer (individually) each question chart by noting their responses on individual note pages.
7. After a time of individual work, invite the group to post their responses on the appropriate question charts.
8. Invite everyone to browse the posted notes in a random fashion, even discussing them informally for a time.
9. Organize the team into small groups of 3-4 people each. Assign each of these teams to two or three of the question charts, grouping like question charts if possible.
10. Have each team analyze their assigned question charts, looking for patterns and themes in the responses to each question. The small groups should prepare a report out of their findings. Once given, allow the rest of the team a chance to add their thoughts to the initial analysis.
11. Once all the question charts have been analyzed and reported out, invite team members to individually summarize the current situation of the team into one paragraph. Encourage them to assimilate as much of the data as possible to capture the essence of the current situation.
12. Facilitate a large group discussion that blends the team’s diverse perspectives into one assessment paragraph written on a flip chart page.
13. Once a common understanding of the group’s current situation is reached by this method, follow-on methods such as brainstorming and action planning can be used to determine targeted next steps.