

Assessing and Improving Team Processes and Dynamics



It is quite common for team members to struggle with creating and implementing efficient processes while simultaneously creating interpersonal relationships that facilitate the work of advancing health equity.

These resources will help you identify, anticipate and address common team challenges.

Use these tools periodically to assess and improve team functioning. You can use the tools in two ways:

- As an initial readiness assessment BEFORE working on a component of the Roadmap
- For ongoing assessment as you implement each Roadmap component

The tools are most useful when all team members have access to the team charter throughout all their work together.

Team Charter Review

Choose which team description most closely describes your current team composition and implement the accompanying next steps.

Team Description	Next Steps
All partner organizations and individuals on the team have a history of working together on the initiative.	Ensure that all team members are oriented to each component of the Team Charter and have opportunities to ask questions and seek clarification regarding the goals of the initiative and their specific role. This action is especially important for newer team members.
Some, but not all, of the individuals and/or partner organizations have a history of working together on the equity initiative.	Conduct a SOAR analysis. If you completed a SOAR analysis in the past, review the results and determine if it would be beneficial to update the analysis as a group. After reviewing and updating the SOAR analysis, review and update your Team Charter. At least once every three months assess if partner organizations and team members are still aligned on each component of the charter and make updates and revisions as necessary.
Most or all of the individuals and/or collaborative organizations are new partners.	Consider conducting a SOAR analysis and using the resulting information to complete all the components of a Team Charter. At least once every three months assess if partner organizations and team members are still aligned on each component of the charter and make updates and revisions as necessary.

Mission and Goals Alignment Exercise

Ask each team member to independently write down the team's mission and goals without looking at or referencing the Team Charter. Ask each person to submit their written mission and goals; ensure that submissions are anonymous. Review the written responses as a group to assess alignment and agreement across the group. Do the submissions match the mission and goals as written in the team charter? If not, conduct a group review of the team's mission and goals.

Team Discussion Questions

- How often does the team refer to the charter to guide their work and inform their team culture and working relationships?
- When was the last time the team referred to the team charter? If it was more than a few months prior, consider revisiting.

Accountable Spaces Review

Team Discussion Questions

1. Does everyone have access to the Accountable Spaces agreement in the team's charter?
2. How often does the team use or reference the Accountable Spaces agreement in the team charter?
3. How well does the agreement serve the team? Does it need to be updated?
4. Does the team follow the agreement?
 - a. If it does, describe with examples.
 - b. If not, how can the team begin using the agreement to guide their interactions and conversations?

Assessment Exercise

First, create a process for team members to submit their responses to the following questions anonymously. Second, ask team members to individually answer the questions and submit their responses. Third, discuss the anonymous submissions as a team, ideally with the guidance of a neutral facilitator who is not a team member.

1. Does the team use the accountable spaces agreement to facilitate inclusive interactions for individuals holding identities typically excluded from power and authority?
 - a. Please describe.
 - b. Please provide examples of successes and challenges that the team experiences regarding inclusive interactions.
2. Based on the team's history of conversations and interactions, were there times when referencing and following the accountable spaces agreement would have been beneficial?
 - a. Please describe.
3. Do team members' actions and behaviors foster accountability to the accountable spaces agreement?
 - a. Please describe.
 - b. Please provide examples of successes and challenges that the team experiences regarding accountability to each other and the agreement.

Team Roles and Decision-Making Review

Describe the leadership structure of the team.

- * Who are the team leaders?
- * How are the roles of the team leaders different from other members of the team?

Does the description of team member roles in the team charter match the roles that individuals have been playing in the work of the team?

If not, does the leadership structure or the designation of member roles need to be revised? Does the team charter need to be revised?

Has the team mutually agreed upon a specific process or method for making decisions?

YES:

- * Is the process or method documented in the team charter?
 - * Does the team consistently follow the process or method when making decisions?
 - * Are all of the team members happy with the decision process or method, or is there a need to revise it?
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NO: Consider a variety of decision-making methods or processes and agree upon at least one that the team will use. Document the decision in the team charter.

Team Relationship Dynamics Review

Assessment Survey and Team Discussion Questions

Topic	Assessment Survey	Discussion Questions
Energy	<p>How energized do you feel after our meeting today?</p> <ul style="list-style-type: none"> • Not energized at all • Somewhat energized • Very energized • Extremely energized 	<ol style="list-style-type: none"> 1. What are the key characteristics of a meeting that leaves you feeling energized or motivated? 2. What does feeling energized in or after a meeting mean to you? 3. What does that feeling tell you about the meeting, team dynamics, facilitator, or project/topic?
Sense of worth	<p>My perspective was valued in our meeting today.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree <p>I was genuinely interested in, and curious about, the perspectives of my other team members.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree 	<ol style="list-style-type: none"> 1. What makes you feel like your perspective is valuable? 2. What makes you feel like your perspective is not valued? 3. What actions or words from the facilitator show that your perspective is important? 4. What actions or words from your team members make you feel like your perspective is important? 5. What strategies or intentions should we set to make sure that everyone's perspective is valued?
Clarity	<p>I feel increased clarity on the project, our team, and/or my role after our meeting today.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree <p>The next steps for me and our team are clear after our meeting today.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree 	<ol style="list-style-type: none"> 1. Individually, what does clarity for a project or your role look like? 2. Take a moment to reflect on some past projects/roles when you've felt that the next steps were very clear. What were specific characteristics that made the project or role seem clear? 3. What are some strategies we can use or actions we should take to help increase clarity around the project, team, and roles?

Productivity	<p>How much capacity do you have to take the next steps in the project?</p> <ul style="list-style-type: none"> • No capacity at all • A little capacity • Some capacity • A lot of capacity <p>How motivated do you feel to take the next steps on the project?</p> <ul style="list-style-type: none"> • Not motivated at all • Somewhat motivated • Very motivated • Extremely motivated 	<ol style="list-style-type: none"> 1. What typically helps motivate you? 2. What is inhibiting your motivation? 3. What factors contribute to your current level of motivation? (e.g., the project itself, the larger context or environment, stress, burnout, etc.)
Desire for more connection	<p>I would like more opportunities to connect with my team members in the future.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree 	<ol style="list-style-type: none"> 1. What factors contribute to your current level of desire for more connection with the team? (e.g., team member behavior, the larger context or environment, stress, burnout, etc.) 2. What inhibits your desire for more connection with the team?
Conflict	<p>When our team experiences and addresses internal conflict or significant disagreement, even though it can be difficult, it ultimately strengthens our relationships, helps us transform for the better, and reminds us of our common goals to advance health equity.</p> <ul style="list-style-type: none"> • Strongly disagree • Disagree • Neutral • Agree • Strongly Agree 	<ol style="list-style-type: none"> 1. Does the team avoid directly addressing disagreements or conflicts? 2. What impact does avoidance have on individuals and the ability to meet team goals? 3. When addressing or negotiating conflict does the team keep to its accountable spaces agreement? 4. When addressing or negotiating conflict are all perspectives heard and the people sharing them treated with respect?