

Collaborative Team Process Checklist

(Mann and Muscott, 2004)

INSTRUCTIONS: Team members should use this checklist when they start their work, and at least monthly thereafter to gauge their efficiency and effectiveness and to identify areas that require attention.

School: _____ Team: _____ Date: _____

STATUS: In place Partially in place Not in place	TASK	PRIORITY: High Medium Low
	1. Team membership and member commitment is established.	
	2. Meeting schedule has been determined (when and for how long).	
	3. Meeting location that is distraction-free as possible has been selected.	
	4. Meeting roles have been defined (e.g. facilitator; decision/note-keeper, time-keeper, etc.).	
	5. Roles have been assigned or system for rotating roles has been adopted.	
	6. Process for reaching a team decision (i.e. consensus; majority vote) has been defined and adopted.	
	7. Process for developing a team meeting agenda is established. Job of preparing agenda is assigned.	
	8. Team mission is established that clarifies the function and assignment of the team.	
	9. "Ground rules" for expected meeting behavior have been agreed to, recorded and adopted (develop list or meeting matrix).	
	10. Ground rules and mission are posted at meetings and are regularly referred to as guiding documents for meeting process.	
	11. A "decision log" or "action planning" sheet are used to record decisions made at meetings and to record tasks to be completed. Tasks to be completed are assigned, and dates of expected completion are established (the decision log or action planning sheet may replace traditional "minutes" or "meeting notes").	
	12. Decision log or action planning sheet is distributed to all participants after team meeting is held, and is reviewed as first agenda item at next team meeting.	
	13. A file for notes, handouts and materials used by team is established (if team addresses confidential information, assure that file is in secure location)	
	14. Action plan has been developed to address items of priority that are not in place or are partially in place.	