

Goal-Setting Checklist

Overview

Before teams begin working together on a project, they need to make sure they are on the same page. This assessment tool helps teams determine if they are ready to perform at their best by looking at four dimensions of team effectiveness: goals, roles, interpersonal relationships, and procedures. It provides insights into areas that may need improvement.

GETTING A GRIP ON YOUR TEAM'S EFFECTIVENESS

GOAL-SETTING CHECKLIST

It is infrequent for us to assess the organizational significance of our objectives	0	1	2	3	4	5	Objectives are assessed to make sure they hold organizational significance.
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The staff members are the ones who hold clear accountabilities, not the manager	0	1	2	3	4	5	Everyone, including the manager, has defined responsibilities.
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I do not typically communicate objectives with my team members	0	1	2	3	4	5	I regularly communicate with team members to discuss objectives in depth.
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Goals that are impossible to achieve are often assigned to the team	0	1	2	3	4	5	Goals are typically achievable when they are set.
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Meetings to discuss performance are infrequent.	0	1	2	3	4	5	Performance is frequently addressed in our meetings.
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There is a lack of measures in place to encourage individuals to share information about their goals.	0	1	2	3	4	5	Our objective is to encourage individuals to communicate their goals.
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It's not common for us to specify our criteria for measuring success.	0	1	2	3	4	5	We have concrete measures to determine our level of success.
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Our number of goals for this year are less than 3 or more than 6	0	1	2	3	4	5	Our goals for this year are limited to 3 to 6 achievable ones.
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Our goal-setting sessions are scheduled with a time gap of one year or longer.	0	1	2	3	4	5	Goal update sessions are scheduled every 3 months at minimum.
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Goals are typically not subject to change despite changes in circumstances.	0	1	2	3	4	5	In the event of unexpected situations, it may be necessary to reevaluate our goals.
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Total of 10 circled numbers: _____

ROLES CHECKLIST

Please indicate the degree of fit between your team and the two descriptions provided for each of the ten items related to team roles.

Informal roles may sometimes supersede formal roles.	0	1	2	3	4	5	Formal roles are adhered to while informal roles are not attempted.
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The team's leadership is not clearly defined.	0	1	2	3	4	5	There is a clear understanding of team leadership.
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The job roles and responsibilities of team members are not clearly defined in writing.	0	1	2	3	4	5	There are written job descriptions for every position.
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There is a lack of clarity in defining roles and responsibilities, leading to questioning of individual tasks.	0	1	2	3	4	5	Individuals demonstrate a strong understanding of their duties and seldom exhibit doubt towards them.
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When a person is not present, others experience uncertainty about how to proceed.	0	1	2	3	4	5	The completion of important tasks is not hindered by the absence of one individual.
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There is a lack of mutual respect for each other's roles in the process.	0	1	2	3	4	5	Each team member's role is valued and respected by all.
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There is currently no training or preparation for a new position.	0	1	2	3	4	5	Individuals are consistently being prepared for their future roles.
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There is no established program in place to address weaknesses among staff members.	0	1	2	3	4	5	Continuous attention is given to staff development.
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Assigning work is a challenging task as it may cause conflicts.	0	1	2	3	4	5	The process of assigning work is straightforward as the team members are aware of their roles and willingly fulfil them.
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Our roles are not openly discussed.	0	1	2	3	4	5	We have a transparent discussion about our roles.
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Total of 10 circled numbers: _____

INTERPERSONAL RELATIONS CHECKLIST

Please indicate the degree of fit between your team and the two descriptions provided for each of the ten items related to interpersonal relationships.

I maintain a professional relationship with my teammates, viewing them more as co-workers than friends.	0	1	2	3	4	5	Friendships within the team are frequent and do not result in issues.
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I become aware of the problems I've caused only after it's too late.	0	1	2	3	4	5	Issues that I cause are promptly identified in order to take corrective measures.
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The team members' perceptions of our relationships differ from those of people outside the team.	0	1	2	3	4	5	The team's perception of their interpersonal dynamics aligns with the perception of outsiders.
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The expression of anger and frustration can manifest as outbursts of violence.	0	1	2	3	4	5	Resolution of anger and frustration occurs through rational means.
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There are certain individuals in the team who exhibit behaviour that could be perceived as treating others as inferior.	0	1	2	3	4	5	There is a noticeable presence of empathy and equal treatment among individuals.
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There is a lack of communication regarding the team's individual work.	0	1	2	3	4	5	The team demonstrates a willingness to give and receive feedback in a constructive manner.
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In situations of conflict, typically one individual emerges as the victor, often resulting in the sacrifice of others involved.	0	1	2	3	4	5	Conflicts are resolved to reach a mutually satisfactory outcome.
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Individuals tend to withhold their personal issues.	0	1	2	3	4	5	Individuals engage in discussing their issues with one another.
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There is a lack of evidence indicating trust among team members.	0	1	2	3	4	5	There is significant evidence that indicates mutual trust within the team.
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There is an unequal distribution of participation in decision making and meetings, with some individuals dominating the conversation.	0	1	2	3	4	5	Participation in decision making and meetings is distributed equally among all members.
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Total of 10 circled numbers: _____

PROCEDURES CHECKLIST

Please indicate the degree of fit between your team and the two descriptions provided for each of the ten items related to interpersonal relationships.

Communication is currently lacking clarity and direction	0	1	2	3	4	5	Clear communication is achieved, thus the providing clear source and method of obtaining information.
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The productivity of our meetings is low.	0	1	2	3	4	5	Our meetings are efficient and effectively organized.
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It is not always typical for formal regulations to be followed.	0	1	2	3	4	5	There is a significant emphasis on following formal rules.
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The policies and procedures need improvement in terms of communication clarity.	0	1	2	3	4	5	The policies and procedures are readily available and well-written for our use.
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Our organization does not have a protocol for addressing and resolving conflicts	0	1	2	3	4	5	We have established a formal process for resolving conflicts.
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Policies prioritize procedures that require significant labour and time, potentially at the expense of error prevention.	0	1	2	3	4	5	Policies prioritize comprehensive completion of tasks.
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Updating our operating procedures is required	0	1	2	3	4	5	Our operating procedures are regularly updated to ensure they are in line with current methods and technology.
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The team is facing challenges in coming to a consensus on difficult decisions. 0	0	1	2	3	4	5	A formal process has been put in place to resolve conflicts.
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The organization's policies exhibit inconsistency across various areas.	0	1	2	3	4	5	Policies are generally applicable to all areas but may have some essential exemptions.
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Our organization does not accept suggestions for change.	0	1	2	3	4	5	Our organization encourages and facilitates the creation of innovative concepts.
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Total of 10 circled numbers: _____

SCORING AND INTERPRETATION

The determination of a best or worst total score is meaningless due to the subjectivity of each statement's interpretation and the variables present in a numerical rating system.

The purpose of the checklists is to assist in diagnosing the strengths and weaknesses of the team in relation to various activities and behaviours. The diagnosis is based on comparing responses within the team, rather than against the scores of other teams.

Responses are rated from zero to five points using a rating scale. The maximum score for each of the four team dimensions is 50 points. Comparing the score for each dimension against the other three reveals which area needs more development. Within each dimension, the items with the lowest scores need the most urgent attention.