Leading a Nonprofit Organization:
Tips and Tools for Executive Directors and Team Leaders
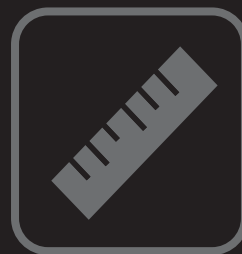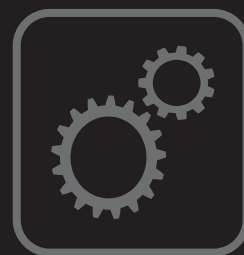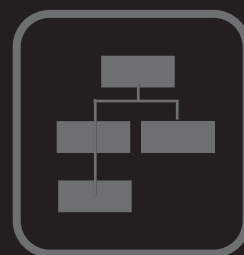
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INTRODUCTION

The Compassion Capital Fund (CCF), administered by the U.S. Department of Health and Human Services, provided capacity building grants to expand and strengthen the role of nonprofit organizations in their ability to provide social services to low-income individuals. Between 2002 and 2009, CCF awarded 1,277 grants, and the CCF National Resource Center provided training and technical assistance to all CCF grantees. *Strengthening Nonprofits: A Capacity Builder's Resource Library* is born out of the expansive set of resources created by the National Resource Center during that time period, to be shared and to continue the legacy of CCF's capacity building work.

Strengthening Nonprofits: A Capacity Builder's Resource Library contains guidebooks and e-learnings on the following topics:

1. Conducting a Community Assessment
2. Delivering Training and Technical Assistance
3. Designing and Managing a Subaward Program
4. Going Virtual
5. Identifying and Promoting Effective Practices
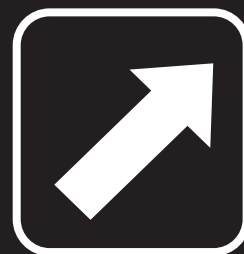6. Leading a Nonprofit Organization: Tips and Tools for Executive Directors and Team Leaders
7. Managing Crisis: Risk Management and Crisis Response Planning
8. Managing Public Grants
9. Measuring Outcomes
10. Partnerships: Frameworks for Working Together
11. Sustainability
12. Working with Consultants

Who is the audience for *Strengthening Nonprofits: A Capacity Builder's Resource Library*?

Anyone who is interested in expanding the capacity of nonprofit services in their community – from front line service providers to executives in large intermediary organizations – will benefit from the information contained in this resource library. The National Resource Center originally developed many of these resources for intermediary organizations, organizations that were granted funds by CCF to build the capacity of the faith-based and community-based organizations (FBCOs) they served. As such, the majority of the resources in *Strengthening Nonprofits: A Capacity Builder's Resource Library* support intermediary organizations in their capacity building efforts. However, funders of capacity building programs (Federal program offices and foundations) and the nonprofit community (including FBCOs) at large will also find these resources helpful. In addition, individuals working to build capacity within a program or an organization will be able to use these resources to support their efforts to implement change and make improvements.

The ***Leading a Nonprofit Organization*** guidebook will be helpful to new or current executive director or anyone leading or managing a team/committee within a nonprofit.

Who developed the ***Leading a Nonprofit Organization*** guidebook?

The guidebook was developed for the Department of Health and Human Services by the National Resource Center.

OVERVIEW

No matter your title or role, there are plenty of opportunities while working at a nonprofit organization for you to serve as a leader. Whether you are directing a board, chairing a committee, managing a team, or coordinating a project, the goal is always the same — to lead effectively.

The structure of some nonprofits may mirror the corporate model, with a clearly defined chain of command, but many others, particularly smaller organizations, pursue their mission in a more unique fashion. Accordingly, this toolkit is divided into two main sections: "Operational Responsibilities of the Executive Director" and "Leading Teams." The former provides practical tips and tools for the first-time executive, while the latter discusses leadership in broader terms — offering insight and activities to help anyone become a stronger leader.

OPERATIONAL RESPONSIBILITIES OF THE EXECUTIVE DIRECTOR

As the person in charge of the operations of a nonprofit organization, an executive director has many unique responsibilities. Executive directors are charged with establishing and enforcing the vision of the organization; recruiting and supervising office staff; maintaining a productive relationship with the board of directors; creating a fundraising plan that will ensure sustainability; and managing organizational finances.

Becoming an Executive Director

Starting a new job is always an exhilarating experience, and nonprofit directors have the power to effect real, lasting change. The first half of this toolkit offers tips and tools to help make your adoption of this new role as seamless as possible.

If you are replacing a former executive director rather than starting your own organization, it is important that your orientation occurs as part of a larger transitional plan. Because the executive director takes the lead in establishing an organization's climate, work, and processes, assuming control can impact staff morale, board member engagement, and the perception of funders and clients.

New Executive Director Checklist

Here's a quick list of the essential documents that a new executive director should gather together on the first day of work and keep in a management folder. If these documents are not already available, you should make it a top priority during your first quarter on the job to get them developed.

General

- ❒ Most recent annual report
- ❒ Strategic plan
- ❒ Staff contact sheet
- ❒ Board roster and contact information
- ❒ Board policies and procedures
- ❒ Minutes from recent board meetings
- ❒ Technology inventory

- ❒   Organizational conflict of interest policy
- ❒   Bylaws
- ❒   IRS determination letter

Human Resources

- ❒ Personnel handbook
- ❒ All job or position descriptions (including your own)
- ❒ Employee orientation manual and process

Financial

- ❒ Current fiscal year budget
- ❒ Current statement of financial position and activities
- ❒ Recent audit information (if applicable)

Fundraising

- ❒ Funding matrix (with funder name, amounts, and report deadlines)
- ❒ Fundraising plan
- ❒ Recent proposal(s)

Designing, Developing, and Implementing Strategic Plans

As an executive director, it is your responsibility to guide the organization and provide a vision for where it will be in the immediate future and the long term. This is achieved through the creation and implementation of a strategic plan.

Strategic planning charts a course for reaching your goals and evaluating your progress. Strategic planning is important because it provides an organization's board, staff, and stakeholders with a universal blueprint for action.

Every nonprofit will have different needs for a strategic plan, depending upon the organization's leadership, culture, and size. Sometimes strategic planning is less about making big, sweeping decisions and more about clarifying an organization's top priorities.

While board members, staff, clients, community members, and other stakeholders may play a role in forming the strategic plan, the process is often driven by the executive director. If there is a plan already in place, it is typically reviewed and implemented by the executive director.

Design and Development

Prior to the development of a strategic plan, you should determine a design process and identify dates of anticipated achievement. You may also want to consider hiring an external consultant.

Following a few simple rules will increase the likelihood that your strategic plan becomes an actionable one, rather than a document that collects dust:

- Involve the relevant people. Gather input from those upon whom you will rely to implement the plan.
- Break the plan into tasks. Although the plan should contain large, long-term goals, it is equally important to develop actionable steps for achieving them.
- Be realistic. It's okay to think big, but you should also think about what is realistically achievable based on the size and strength of your support team.

Implementation

Once you have a plan in hand, you are ready to put it into action. Here are a few helpful activities for implementing your strategic plan:

- Assign tasks and due dates. For more complex tasks, consider dividing them into smaller action items or assigning them to a work group or team.
- Insert the tasks into the most appropriate job descriptions and schedule performance reviews to monitor progress.
- Distribute the plan in a format that is user-friendly and conducive to implementation.

If there is already a strategic plan in place when you assume the role of executive director, you will want to meet with both board members and staff to review the plan and discuss their reactions and experience. Specifically, you should survey the team on who contributed to the plan, how the plan has historically been implemented, and the perceived effectiveness of the plan. These conversations will help you determine the best way to move forward in implementing the plan.

Hiring, Managing, and Retaining Staff

An organization is only as strong as its staff, so it is essential that you take a thoughtful approach and make informed decisions when recruiting new employees. Once you have a team in place (or if you are inheriting a preexisting staff), it is equally important to engender mutual respect and commitment to the organizational mission.

Whether you are the supervisor of a small team of middle managers or you directly oversee the entire staff, you will play a key role in staff recruitment, management, and retention. Here we offer tips on writing an effective job description, managing smartly, and keeping your staff focused and fulfilled.

Job Descriptions

By providing a straightforward description of the position's key duties and requirements, a well-written employment listing will help applicants determine if they're a good match for the job and provide a framework for choosing the best candidate for the position.

A job description can also prove useful in the orientation and supervision of a staff member, as it helps everyone in the organization understand the boundaries of that person's responsibilities. For the employee and his/her supervisor, it also provides the framework for a performance development plan.

There are several essential elements to crafting an effective job description:

Overview

Provide a brief history. You might want to include when the organization was founded, the organizational mission, and a list of your programs.

Responsibilities

Describe all of the duties associated with the position. Provide plenty of detail in this section. The applicant will rely on this information to determine his or her suitability for the job, and the organization will use the details here to define the new hire's role and create a performance management tool.

Qualifications

List all requirements for applicants to be considered for the position, as well as any preferred skills, knowledge, or experience. Be sure to distinguish between what is essential to the performance of the job (requirements) and what would be considered beneficial but is not essential (preferences).

Application Instructions

Provide an e-mail address or fax number for submitting applications. You should also specify what materials must be included for consideration, e.g., cover letter, resume, writing samples.

Other information you may want to provide in a job description includes salary and benefits; a description of the work environment; travel requirements (if any); the title of the person(s) to whom the employee will report; the terms of employment (e.g., short-term, contract, or full-time); and the job hours or work schedule.

Management and Retention

Whether directly or indirectly supervising employees, the executive director establishes the overall tone for staff management across the organization. While every manager has his or her own style of leadership (see p. 12), there are several key tactics for ensuring that your staff stays well-informed, dedicated, and adaptable:

Staff Orientation

A formal walk-through of the organization's operational structure and practices empowers new employees and makes them feel like part of the team from the very start. It also helps establish clear lines of communication and promotes an open environment that encourages questions and feedback.

Well-defined Roles and Responsibilities

The more employees understand what is expected and required of them, the better they can work toward achieving those goals. A clear understanding of how one fits into and supports the organization allows for a healthy degree of self- and peer-management.

Regular Management Check-ins

Both managers and their employees benefit from periodic reviews and consultations. This ensures that all parties remain on the same page and presents a forum for self-reflection, reevaluation, and open communication.

Meshing of Styles

Each member of your organization has his or her own way of approaching a task and interacting with managers and fellow employees. It's critical to establish an environment in which varying work styles can coexist and flourish.

Research indicates that personal conflicts are the primary reason for employees electing to leave a given job. This underscores the importance of allowing different working styles to coexist. It also cements the need for an executive director to institute measures that will help employees feel secure, valuable, and able to grow with the organization. Some recommended methods for keeping your staff satisfied and dedicated include:

Provide Relevant Benefits

Most employees expect health insurance and paid vacation time, but you should consider any and all benefits that support the needs and desires of your staff, including life and disability insurance or such pre-tax incentives as transportation and childcare subsidies.

Express Appreciation

Always remember to take time to recognize the accomplishments of your employees. Whether you publicly acknowledge an individual's achievement during a staff meeting or throw a party to celebrate the team's successful completion of a project, this kind of gratitude bolsters employee confidence and commitment.

Help Individuals Grow

An executive director is not simply someone who manages daily operations and delegates tasks. You also function as a professional mentor. Get to know your employees and their career aspirations and help them achieve their goals as appropriate. Your encouragement and support will engender loyalty and respect.

Challenge Your Employees

No employee likes to feel like they're just collecting a paycheck. Help your staff grow as they work by learning new skills and taking on new responsibilities. Your employees should continually be reminded that their hard work and willingness to push themselves is integral to the organization's mission and success.

Working with a Board of Directors

As any nonprofit director will tell you, it's not just employees with whom it is essential to maintain a positive working relationship. To function as an effective executive in a nonprofit organization, you must learn to balance your day-to-day leadership duties with your accountability to the board of directors.

The proper balance can only be achieved when both the board and the executive director have clearly defined their roles and responsibilities, and when meetings are structured in an efficient and logical fashion.

Some initial degree of tension or disconnect between the executive director and board of directors is natural, but taking steps to address any challenges or concerns will instill mutual trust and strengthen the organization's operational capacity. Here are a couple of suggestions for optimizing this work relationship:

Clarify Roles and Responsibilities

The line between who is responsible for what is often unclear to both executive directors and board members. Some directors or board members may not have prior experience in their role, while others may have held similar positions but must learn how to adapt to the unique needs of this particular organization.

Try gauging your understanding of the differing responsibilities of the board and the executive director by marking the following statements as true or false:

1. The executive director is legally accountable for all aspects of the organization's operation: _____
2. The board of directors establishes the policies, rules, and guidelines of operation: _____

3. The board of directors can hire, evaluate, or fire any employee: _____
4. The executive director always provides formal authorization of the organization's programs: _____
5. The executive director has final approval of the annual budget: _____

So how do you think you did? (The answers are at the bottom of the page.*) If you didn't get them all correct, don't be discouraged. You may want to review your job description, as well as work on developing a board member orientation process that is easy to understand and follow.

You should also make certain that all board members are provided with detailed descriptions of their legal obligations and the specific needs of your organization. It may prove helpful with this step to obtain BoardSource's *Legal Responsibilities of Nonprofit Boards* or refer to Free Management Library's "Sample Job Descriptions for Members of Boards of Directors."

Maximize Board Meeting Productivity

The next step to getting the most out of your relationship with the board of directors is to ensure that board meeting agendas are clear, concise, and on point. Agendas should be distributed prior to board meetings so that attendees can familiarize themselves with the issues to be discussed.

When creating a board agenda, it is helpful to use the same template for each meeting to ensure a consistent of format and to simplify the work of the individual tasked with taking minutes.

Here is a sample board meeting agenda:

> Community Foundation
> Board of Directors Meeting
> January 15, 2010, 6:30 p.m. – 8:30 p.m.
>
> Welcome
> Review Minutes from Last Meeting (vote needed)
> Program Updates from the Executive Director
> Committee Reports
> - Finance
> - Fundraising
> - Board Development
>
> New Business
> - Review of Audit Report (vote needed)
> - 2009 Operating Budget (vote needed)
>
> Summary of Actions Taken
> Adjourn

Financial Management and Fundraising

In most cases, the executive director is also responsible for determining how the organization spends its money and generates financial support. Managing and raising funds effectively is critical to the sustainability of the organization and will be an issue of particular concern to the board of directors.

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* Answer Key: 1. False, 2. True, 3. False, 4. False, 5. False

Financial Management

At a minimum, a new executive director must have some experience with finance, including hands-on knowledge of cash flow management and bookkeeping. The executive director should also institute such financial controls as the consistent documentation of every dollar raised and spent by the organization, as well as understand how to generate and analyze key financial documents:

Balance Sheet

Also known as a "statement of financial position," the balance sheet reports on the organization's assets and liabilities for a given moment in time. Assets include cash, accounts receivable, equipment, ownership of a building, and any intangible resources that have value, such as a curriculum or copyright. Liabilities are any cash owed, including payroll, rent, transportation, and supplies.

Statement of Activities

This statement of profit and loss compares funding sources against program expenses, administrative costs, and other operating commitments. As opposed to the balance sheet's financial snapshot, the statement of activities reports on a specific time frame (e.g., monthly) and indicates whether the organization is financially solvent (in the black) or owes money (in the red) for that period.
The executive director is also responsible for working with the board, accountant, chief financial officer, and other stakeholders in creating the organization's annual budget.

Fundraising

In tandem with a development director, board member, or other support staff, the executive director is typically tasked with creating and implementing a plan for successfully raising the funds needed per the annual budget.

When creating a fundraising plan, it is important to examine the organization's history to identify previous funding sources. This is the single greatest indicator of future fundraising success. The fundraising plan should outline steps for raising funds from each potential source. Using foundations as a sample revenue source, here are some suggested steps for creating your fundraising plan:

1. Review all previous foundation funding and determine whether the organization is eligible for financial support from each foundation again.
2. Research additional foundations for compatibility with the organization in terms of mission, geographic focus, and organizational life cycle.
3. Complete profiles that include foundation priorities, contact information, proposal due dates, submission instructions, and funding range.
4. Develop a funding matrix to determine the probability of receiving grants from each foundation. Criteria include compatibility with organizational mission, foundation funding priorities, receipt of previous funding, funding of similar organizations in the area, and relationship with the funder.
5. Multiply the probability of funding by the amount of request to determine how much the proposal is "worth."
6. Determine which foundations to apply to based on "worth."

Foundation	Amount of Request	Probability of Receiving Funds	Total Revenue = (Amount of Request) x (Probability)
ABC Foundation	$25K	100%	$25K
For the Kids Foundation	$20K	100%	$20K
Do Good Foundation	$20K	90%	$18K
Little Foundation	$20K	95%	$19K
Family Foundation	$50K	80%	$40K
All Over Foundation	$20K	90%	$18K
Big Foundation	$75K	60%	$45K
National Foundation	$15K	60%	$9K
Great Foundation	$15K	55%	$8.25K
Giant Foundation	$15K	50%	$7.5K
Total			$209.75K

The steps above can be adapted for planning to raise funds from individual donors, corporations, and government entities. Once you determine from whom you will be seeking funding, you will need to establish a plan and time frame for requesting the funding.

LEADING TEAMS

Leadership is a critical factor in managing the complexities of a nonprofit organization, but you don't have to be the executive director to be a leader. Nearly everyone must lead at some point in their employment at a nonprofit, whether it's in the form of heading a project or mentoring a co-worker.

Leadership Styles

It takes more to effectively lead than simply being the one in charge. The critical question for any person placed in a leadership position to ask is whether or not people are willing to follow your direction. An important first step in answering this question is to consider your approach to leading. Let's explore a few of the most common leadership styles[1]:

Authoritarian

This style of leadership is one that connotes being a leader with having all of the decision-making responsibility. Although authoritarians are often criticized for adhering to conventional notions of leadership, there are times when this style is most appropriate, such as when the leader is clearly the most knowledgeable and qualified to decide or when there isn't sufficient time to consider team input.

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1   Adapted in part from the U.S. Army Handbook (1973). Military Leadership.

Participative

In contrast to the authoritarian, the participative leader consults with team members when decisions need to be made. When used effectively, this style of leadership can help motivate the team and keep people engaged. Participative leadership tends to make team members feel more valued, but it is a style best employed only when there is ample time for group discussion and evaluation.

Delegative

The effective use of delegative leadership requires the leader provide sufficient coaching and support for the team to feel comfortable making decisions. A delegative leader must also pay close attention to the skills and talents of the team to help ensure that appropriate levels of responsibility and decision-making authority are assigned. Delegative leadership does not mean that you relinquish responsibility and can blame others if things go wrong.

Depending upon the situation, a leader may need to employ a leadership style to which they are unaccustomed, or combine two or more styles. Over time, as project or organizational needs change, you may consider reevaluating or adjusting your leadership style. It also helps to be open to team feedback and to occasionally reflect upon your leadership approach.

Team Management and Performance Tools

There are a variety of models that have been designed to help manage teams and plan projects. We have chosen to focus on two of them — the Drexler/Sibbet Team Performance Model and the GRPI project planning model. Both present logical approaches to getting the most out of your work with a team.
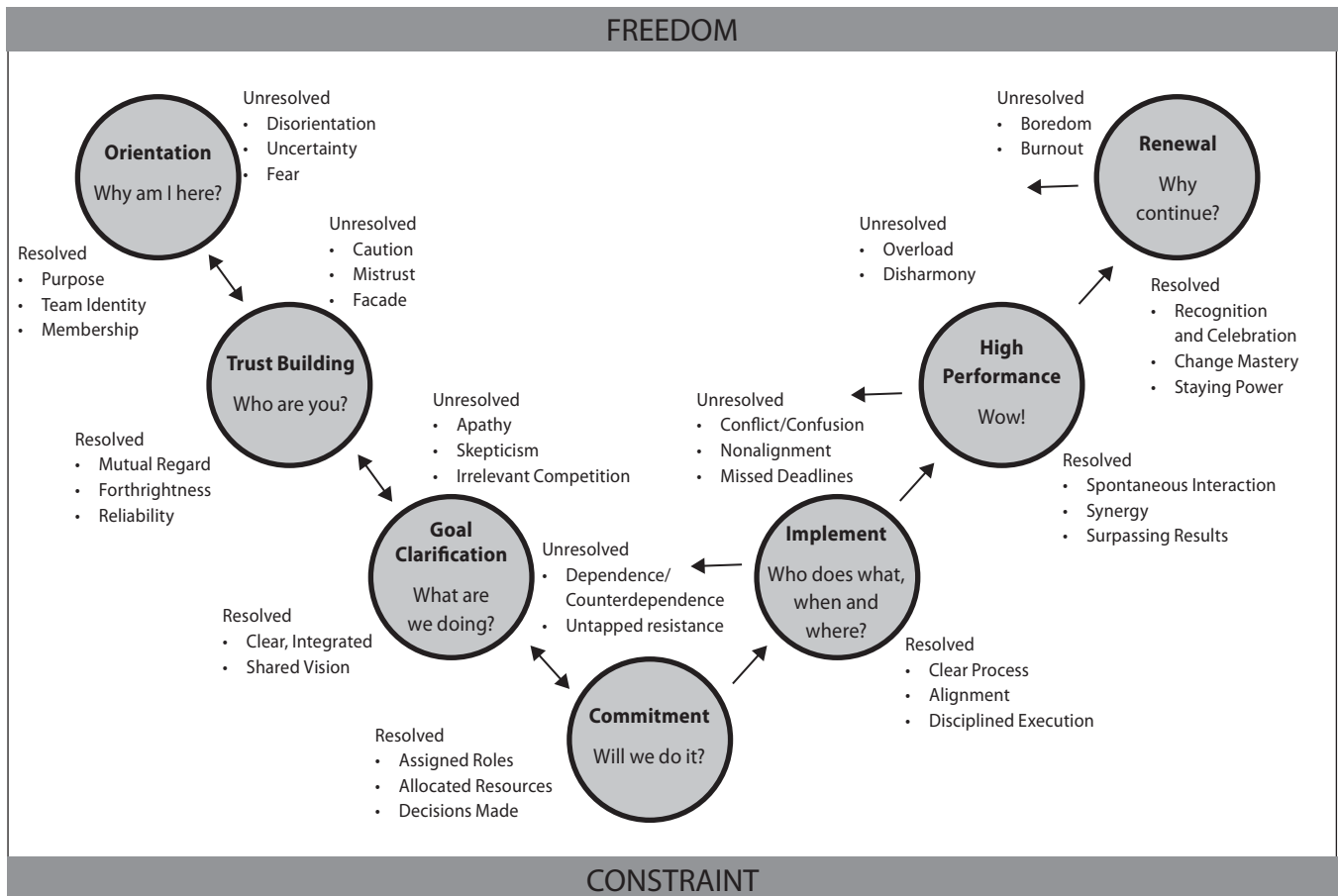
The Drexler/Sibbet Team Performance Model

Developed by Allan Drexler, David Sibbet, and Russ Forrester, this model (see below) comprises seven stages to help optimize the workflow of a team effort: orientation, trust building, goal clarification, commitment, implementation, high performance, and renewal. Each stage is identified by the primary question of concern for team members when they are in that phase.

The structure of the model resembles the path of a bouncing ball. This is because the model demonstrates the team's arch of energy. When in the stages toward the top of the diagram (the beginning and end), teams will often feel a greater sense of freedom — the orientation and renewal stages provide opportunities for limitless potential and possibility.

As a team moves into stages toward the bottom of the diagram (the middle stages), there are more constraints. Goals are set; some things end up being included, and others do not.

Let's look more closely at each of the seven stages and the questions and issues raised during them:

Orientation

Why am I here?

Unresolved
- Disorientation
- Uncertainty
- Fear

Resolved
- Purpose
- Team Identity
- Membership

Trust Building

Who are you?

Unresolved
- Caution
- Mistrust
- Facade

Resolved
- Mutual Regard
- Forthrightness
- Reliability

Goal Clarification

What are we doing?

Unresolved
- Apathy
- Skepticism
- Irrelevant Competition

Resolved
- Clear, Integrated
- Shared Vision

Commitment

Will we do it?

Unresolved
- Dependence/ Counterdependence
- Untapped resistance

Resolved
- Assigned Roles
- Allocated Resources
- Decisions Made

Implement

Who does what, when and where?

Unresolved
- Conflict/Confusion
- Nonalignment
- Missed Deadlines

Resolved
- Clear Process
- Alignment
- Disciplined Execution

High Performance

Wow!

Unresolved
- Overload
- Disharmony

Resolved
- Spontaneous Interaction
- Synergy
- Surpassing Results

Renewal

Why continue?

Unresolved
- Boredom
- Burnout

Resolved
- Recognition and Celebration
- Change Mastery
- Staying Power

Orientation

The primary question asked during this first stage of the model is, "Why are we here?" The team must work together to identify a task that each individual finds personally beneficial, useful, or important to the organization. When a team member is unable to envision their role, they often feel anxious and distance themselves from the group. Alternatively, when a member feels more connected, they are more likely to participate in achieving the group's goals.

Trust Building

According to the model creators, this is the stage during which "people want to know who they will work with — their expectations, agendas, and competencies." Trust can only be established once team members become clear on their individual roles and responsibilities and establish a better understanding of each other's work styles and experience.

Goal Clarification

Here is where the team works to identify a shared vision by discussing possibilities, variations, and the reasons these goals may or may not be the best options. Some disagreement can happen during this stage, so it is important to make sure that everyone is on the same page before proceeding. This is also a good time to address any conflict between individual and organizational goals.

Commitment

This stage comprises the most constraining work the team will face during the entire process. If your work here remains unresolved, some team members may disown individual responsibility for the success of the team by going along with the preferences of others, while others may attack proposed courses of action

without offering any feasible alternatives. Such behavior could indicate a lack of priorities, roles, or a clear definition of how work should proceed.

Implementation

The implementation stage is dominated by timing and scheduling. You may cycle back through earlier stages of the process as your team encounters unforeseen obstacles and works to find its groove. The key here is to impose some shared process for completing the team's work. This can be achieved through online project management tools, flowcharts, or work plans.

High Performance

While the design of this model might suggest that "high performance" is a destination that all teams reach, research indicates that many never do. But you don't have to reach this point for good work to get done. The process outlined in the Drexler/Sibbet model is designed to increase the likelihood of becoming a high-performance team and spending more time in this stage.

Renewal

The primary question at this stage of the process is, "Why continue?" You can think of renewal as both an ending and a new beginning. Each team member may want to reflect on what did and did not work, what was achieved and can now be left behind, and what issues remain to be tackled.

Teams don't always move through the Drexler/Sibbet model in a linear fashion, so don't be discouraged if you are unable to complete one stage before moving onto another. The model is designed to enhance workflow and team performance rather than restrict the team to a fixed set of rules.

GRPI Project Planning Model

Some teams may find it difficult to adapt the theory presented in the Drexler/Sibbet model into everyday practice. Another tool that may prove helpful in planning projects is GRPI — an acronym for goals, roles, process, and interpersonal relationships.

The GRPI model suggests that teams and their leaders will function most effectively if they address the four stages of planning in the order they are listed in the acronym:

- **G**oals — What is the team going to accomplish? What is its core mission?
- **R**oles — Who will do what on the team? Are the roles and responsibilities clear?
- **P**rocess — How will the team work together to solve problems/make decisions?
- **I**nterpersonal relationships — How do the team members get along?

You can also use the GRPI model to develop a team charter and a solid agenda for your next team meeting. Here are some suggested steps to take toward achieving those goals:

Developing a Team Charter

Goals

- Identify the one mandate that will drive the work of your team.
- Identify two additional team goals.
- Have each team member identify a personal goal.

Roles

- Determine the key team project roles.

- Briefly clarify the responsibilities of each role.

- *Optional*: Identify who will fill these roles.

Process

- Determine a method for making decisions, e.g., consensus, leader, co-leaders, majority vote.

- Decide on due dates for deliverables.

- Agree on three workable strategies for resolving conflict within your team, e.g., appointing a mediator when two people can't reach an agreement.

- Identify three ground rules that your team will follow, e.g., one person talks at a time; focus on what the person is saying, not on what you will say in response; no side conversations allowed; no cell phones or e-mailing during meetings; everyone must be heard from on important decisions.

Interpersonal Relationships

- Have each team member share one key expectation he or she has of the other team members in their work together.

Developing a Solid Agenda for Your Next Meeting

Date:	**Start time:**	**End time:**
Location:	**Facilitator:**	
Note-taker:	**Timekeeper:**	

Agenda Items

- ❑ Check-in _____ minutes
- ❑ Review agenda _____ minutes
- ❑ Review meeting objective _____ minutes
- ❑ Review previous meeting _____ minutes
- ❑ Give work reports/updates _____ minutes
- ❑ Meeting task: _____ minutes
- ❑ Meeting task: _____ minutes
- ❑ Meeting task: _____ minutes
- ❑ Plan for next meeting
  (date, time, length, location, facilitator) _____ minutes
- ❑ Review today's commitments _____ minutes
- ❑ Evaluate meeting _____ minutes

Exercises and Activities

Here are a few tools designed to help align your team, build trust, evaluate productivity, and assess your performance as a leader:

Staff Alignment

The goals of this exercise are to 1) review your current staffing plan, 2) align your team, and 3) prepare for project implementation. Consider how best to align staff to maximize the impact of your team's project.

Follow these instructions to complete the staffing plan table below:
1. Identify the discrete aspects of the project and list them across the top row of the table.
2. List the names of all those who will be working on the team's project in the far left column of the table.
3. Identify in the corresponding columns each individual's role in each discrete aspect of the project.
4. Add rows as needed to complete this activity.

	[DISCRETE ASPECT]	[DISCRETE ASPECT]	[DISCRETE ASPECT]	[DISCRETE ASPECT]
NAME:				
NAME:				

Trust Building

This activity is designed to explore team members' perceptions of one another and to promote open dialogue.
1. Team members identify and share the single most important contribution each of their fellow team members has made to the team.
2. Team members identify and share one area that their fellow team members must improve upon for the good of the team.
3. Team members identify and write down on a note card an underlying challenge or conflict that the team has been unable to discuss openly.
4. Team leader or facilitator collects the cards and reads them out loud.
5. The team selects one or more of these conflicts to discuss openly. If the leader/facilitator notices discomfort over the conflict, he or she asks team members not to retreat from healthy, honest discussion.

Team Status Check-in

This activity presents an opportunity to evaluate your team's progress in achieving its goals.

1. What are your target outcomes? Have you hit them?	
2. Status of planned activities and schedule	
3. Status of any work products or deliverables	
4. Personnel changes	
5. Highlights or accomplishments	
6. Implementation challenges or barriers	
7. Analysis of challenges/barriers — underlying issues, strategies, methods, and assets (internal or external)	
8. Solution and implementation steps	

Self-Assessment

It's always a smart tactic to ask yourself a few basic questions about your experience as a team leader. This exercise is designed to help you identify any areas of concern and think about how best to address them.

Questions:

1. What have been your top three challenges in leading teams?
2. What have been your top three successes in leading teams?
3. What are your top three strengths or assets as a leader?
4. What is your single most effective team building practice, tool, or solution?
5. What have you tried as a leader that did not work?
6. What is the most essential piece of advice you would give to a new leader or manager about leading teams?
7. How have you changed as a team leader?

Next Steps:

- Identify one leadership challenge from above to explore.

- Consider any underlying issues/dynamics, as well as your strengths and assets as a leader.

- Document possible solutions, changes, or effective practices to implement in addressing your leadership challenge.

LEADERSHIP CHALLENGE	
UNDERLYING ISSUES OR DYNAMICS	
LEADERSHIP STRENGTHS AND ASSETS	
SOLUTIONS	