

# Team Diagnostic Survey

## Full Team Report



Project: Initial Evaluation

Team: The Guides

Org: Developing Citizen Leaders

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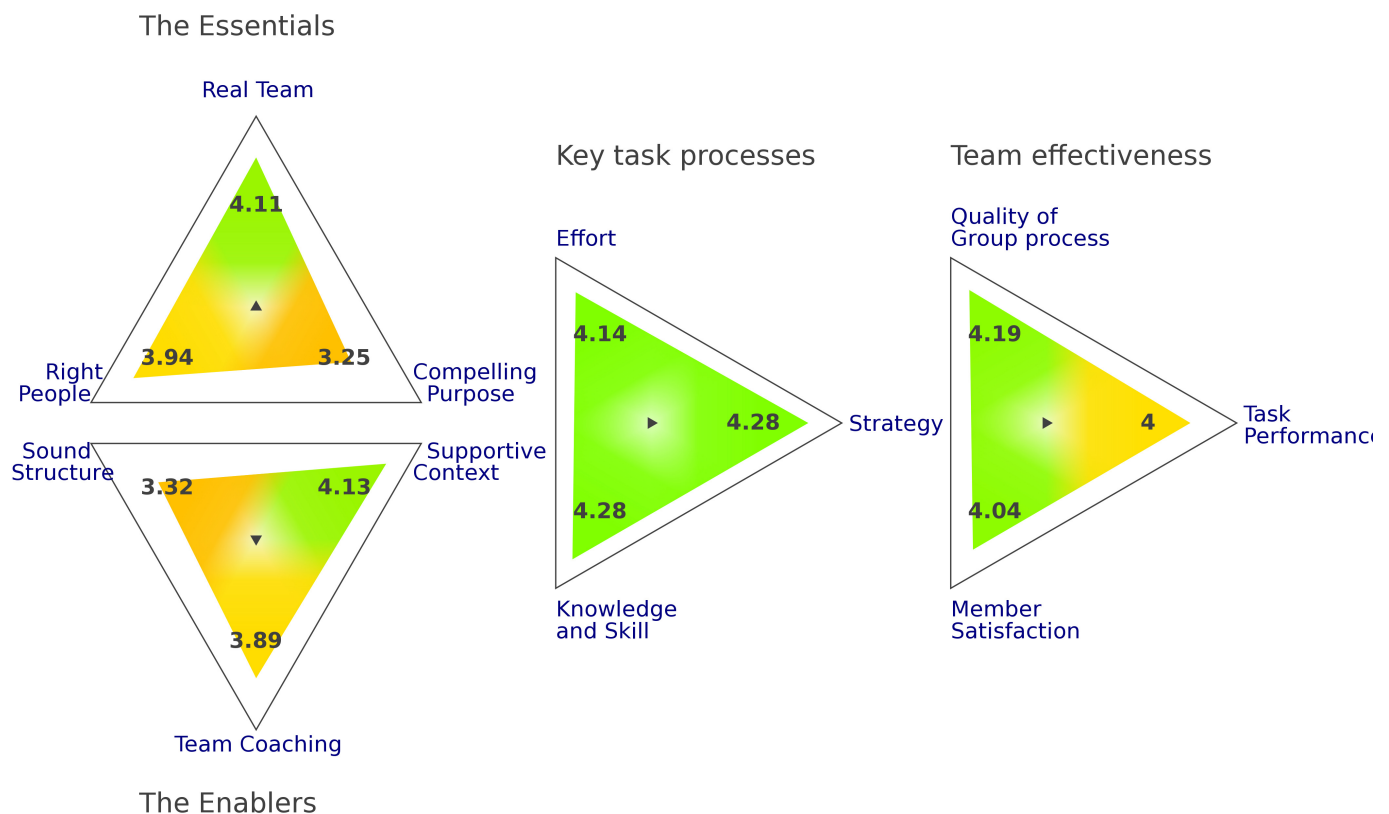
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### Introduction

The Team Diagnostic Survey is a well-validated instrument designed to diagnose the strengths and weaknesses of teams. Drs. Ruth Wageman, Richard Hackman, Erin Lehman and their colleagues at Harvard and other universities developed this assessment based on their research about the major conditions that foster team effectiveness. It measures 6 Conditions that account for up to 80% of team effectiveness, 3 Key Task Processes that emerge from those conditions, and 3 measures of Team Effectiveness.

### Overall Snapshot: What is the team's standing on the 6 Conditions, the 3 Task Processes and the 3 Criteria of Effectiveness?

The graphic below illustrates at a glance the relative strengths and weaknesses of the team. In the graphics, **green** shading that is close to the black "ideal" triangle indicate that the team is in good standing; **yellow** shading, more distant from the ideal, indicate some need for attention, and **orange and red** indicate that the team faces significant challenges on that dimension. The numbers in each triangle report the mean scores of the team on each factor (1=poor, 5=superb).



**6 Conditions.** The first part of the diagram, the Six Conditions, represent the main features of a team's design that you can influence to shape its effectiveness. The Six Conditions are presented in chronological order. To build a great team, first come the **Essentials** (Real Team, Right People, Compelling Purpose). When the Essentials are in good shape, turn next to the quality of the **Enablers** (Sound Structure, Supportive Organizational Context, Team Coaching). Detailed definitions and breakdowns of these 6 are in the pages that follow.

**3 Key Task Processes.** Together, these Six Conditions collectively influence the 3 key task processes that drive team effectiveness: Effort (how hard is the team working?), Strategy (how effective are the team's approaches to the work?) and Knowledge and Skill (how well is the team using its full capabilities?) These 3 Task Processes are great predictors of how well a team will perform in the long run and how it will develop over time.

**3 Criteria of Team Effectiveness.** A superb team is one that (1) meets or exceeds the needs of its clients (Team Task Performance); (2) does so in ways that build the team's capability (Quality of Group Process) and (3) contributes to the growth and learning of its members (Member Satisfaction).

**Supplemental Material.** In addition to these main dimensions, this report summarizes other aspects of team functioning and leader behavior that help identify and interpret opportunities for intervention and coaching.

### Interpreting charts and graphs in this report

Throughout the TDS report, **green** shading indicates that the team is in good standing on that dimension; **yellow** shading indicates some need for attention, and **orange and red** indicate that the team faces significant challenges on that dimension. The shading is relative to the absolute standard (1=poor, 5=superb) on the measurement scales used, and not based on empirical norms.

Data presented in blue are descriptive (e.g., pages 19 and 24); there is no "better" or "worse" score on these dimensions.

The height and depth of bars in the bar charts indicate spread of responses, with the average of team member responses reported with the dark line in the middle of the bar.

### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Reflecting on this summary diagram, consider:

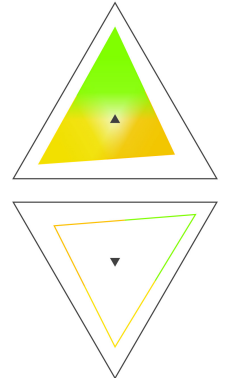
Where are the team's greatest strengths? In other words, where are the scores closest to ideal? Are those strengths among the Essentials?

Which scores are of most concern? Where is the team farthest from ideal? Tackle the Essentials first. Teams must have a solid basic design in order to take advantage of the Enablers.

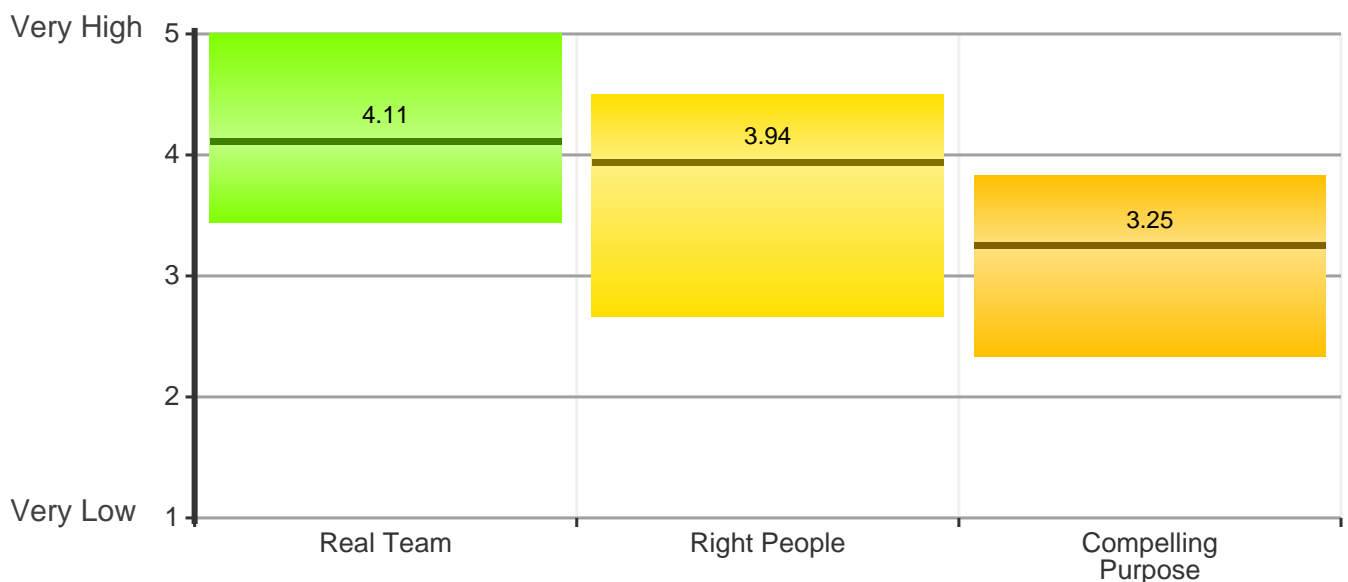
### The Essentials

#### The Essentials

**The Essentials** are the three main conditions that result in a sturdy platform for any team to be able to perform effectively: a Real Team, working toward a Compelling Purpose, with the Right People involved in the team. If any of these conditions are missing or weak, teams will inevitably struggle over time.



#### The Essentials



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

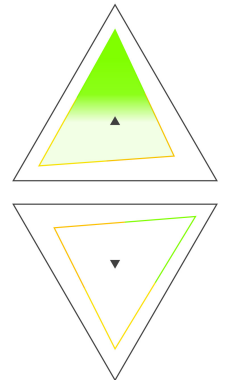
Which of the Essentials—Real Team, Right People, Compelling Purpose—is in most need of attention? The pages that follow will address each of these in more detail.

Note: The size of the bars indicates the spread of responses in the team. Larger bars mean there is less clarity and agreement in the team.

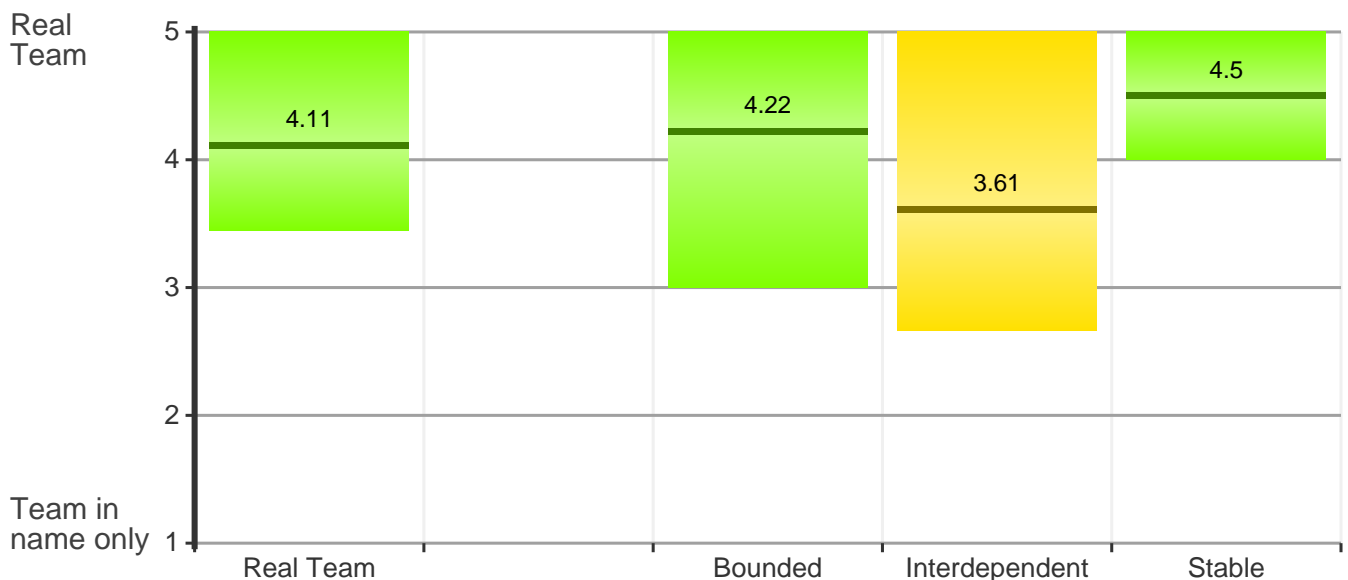
### Is this a Real Team?

#### Is this a Real Team?

**Real Team** means that the team is **Bounded**, meaning that members know who is and is not on the team. It is **Stable**, meaning that members stay together long enough to learn how to work together. It is **Interdependent** for a common purpose, meaning the team must interact and share resources to accomplish their purposes.



#### Is this a real team?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams score low on Real Team typically because:

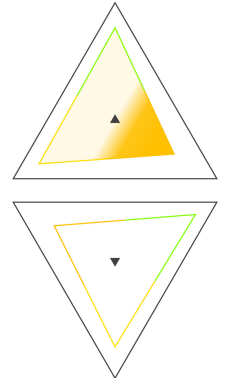
- Their work is disaggregated into individual tasks performed independently of each other.
- They are a team in name only.
- When the team convenes they merely provide updates on their individual accomplishments.
- Membership changes frequently or the team is kept intact for too little time.
- Different people show up to each meeting.



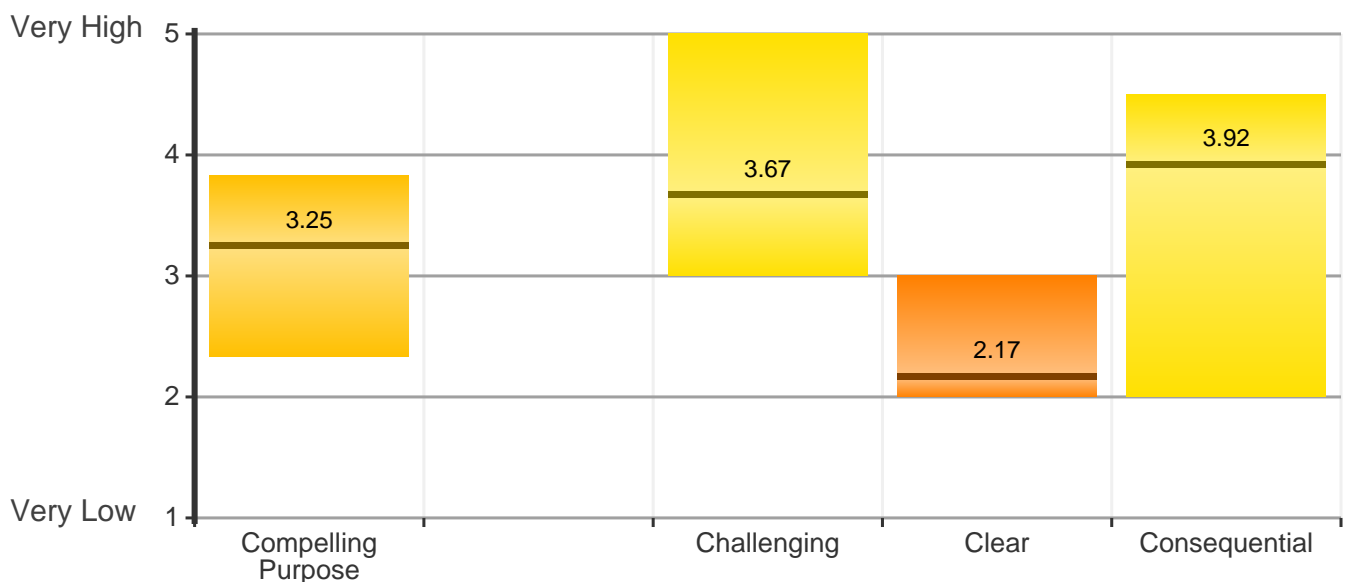
### Does the team have a Compelling Purpose?

#### Does the team have a Compelling Purpose?

**Compelling Purpose** means that the purpose is **challenging** (a stretch, but not impossible), **clear** (they know what it would look like to accomplish it) and **consequential** (it has meaningful impact on the lives and work of others). Compelling purpose orients and motivates team members so that they are headed in the same direction—even when they are not working in the same place at the same time—and they do so with energy and conviction.



#### Does the team have a compelling purpose?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

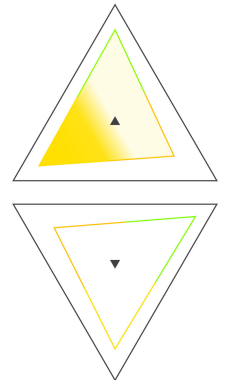
Teams with low scores on this Essential condition typically struggle with some or all of these threats to their effectiveness:

- The team's purpose lacks importance in the overall scheme of things, does not resonate well with members' values, or has been poorly connected to strategic aims of the larger organization.
- The purpose is relatively trivial or doesn't stretch members' capabilities.
- The impact of their work or what success looks like is vague.

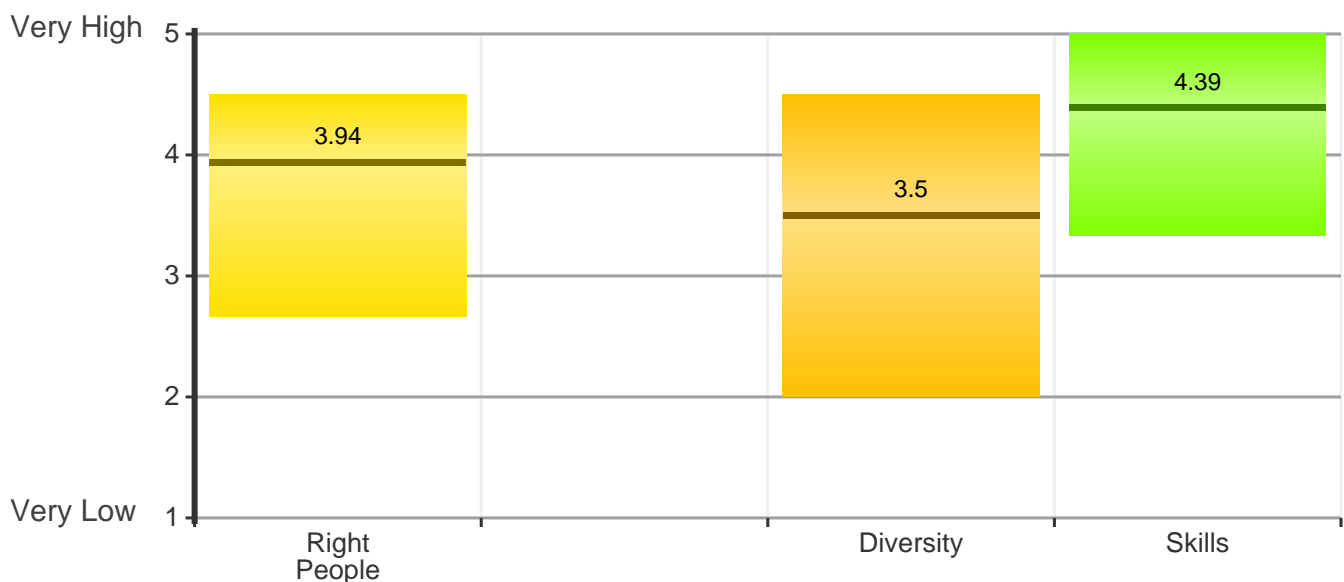
### Does the team have the Right People?

#### Does the team have the Right People?

**Right People** means that the team has both the right **Skills** to do the work effectively—including *teamwork* skills; and **Diversity** that brings a range of perspectives needed to perform creatively and well.



#### Does the team have the Right People?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams that score low on **Right People** often do so because:

- Members have been placed on the team without enough thought about what they can contribute to the purpose, and they may be there for other reasons (representing each part of the organization, for example).
- No one assessed the degree of teamwork skills that members have.
- Members may be “too different” so they struggle to understand each others’ perspectives.
- Or they may be “a good Mix,” meaning the right range of perspectives.
- The boldface text at the bottom interprets the “Diversity” bar above. Members may be “too alike”—so similar in background and experience that the range of perspectives is too narrow:

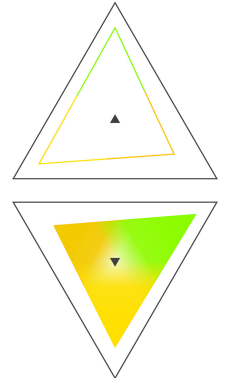
#### Diversity: (a good Mix)



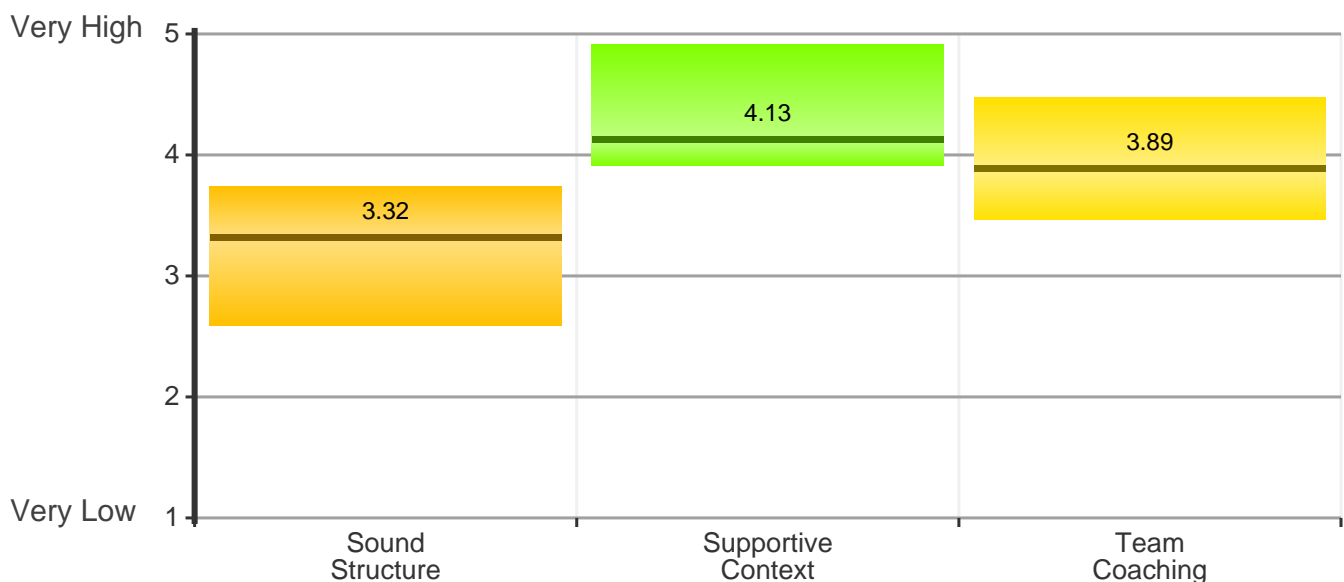
### The Enablers

#### The Enablers

This chart represents the team's scores on the **Enablers**. The bar chart provides the team's scores on **Sound Structure**, which means the team's size, tasks, and core norms of conduct. It shows whether the team works in a **Supportive Organizational Context**, meaning the organization's structures and systems enable rather than undermine teamwork. The third **Enabler** is **Team Coaching**, meaning the availability of someone to help the team develop effective processes.



#### The Enablers



These three conditions accelerate how fast teams grow into truly excellent performers. In the pages that follow, we break down the Enablers into their elements.

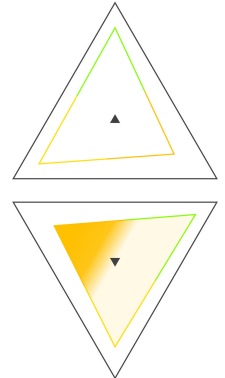
### Does the team have a Sound Structure?

#### Does the team have a Sound Structure?

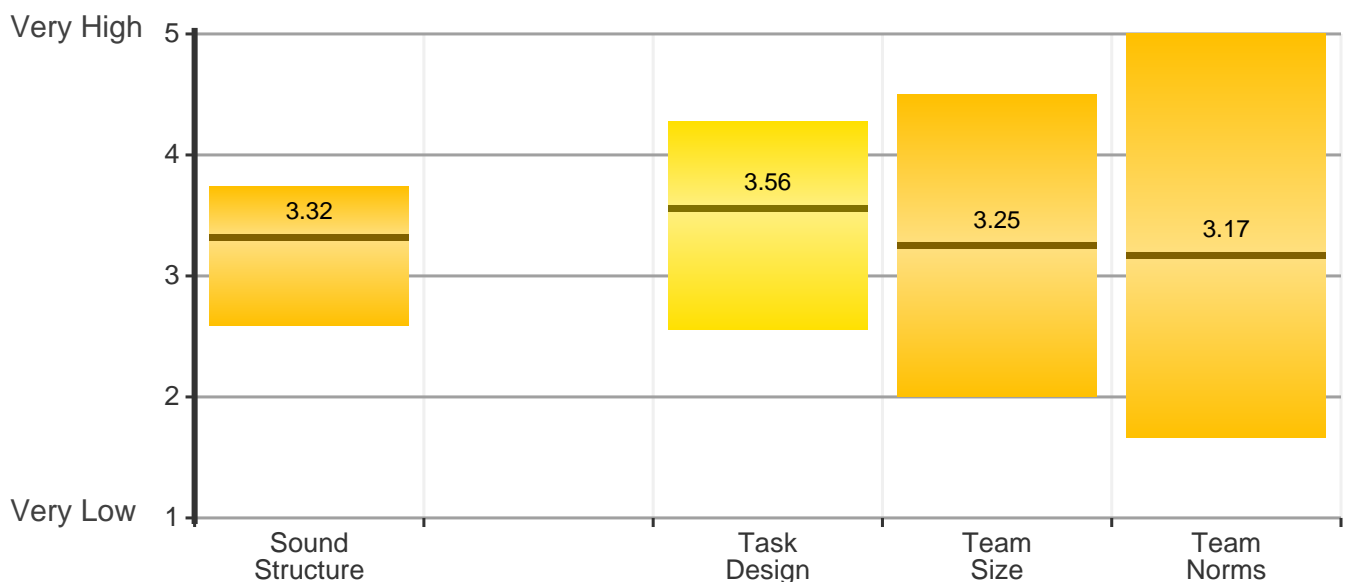
**Sound Structure** has three elements. **Task Design** means the team performs work that makes sense to be done by a team and that allows members to use their judgment and experience to complete it;

**Team Size** means the team is neither too big to coordinate nor too small to have the resources they need to do the work;

**Team Norms** means the team has clear ground rules for how members are expected to work together.



#### Does the team have a Sound Structure?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams with low scores on Sound Structure often suffer from:

- Too many people in the team, sometimes for political rather than task reasons.
- Expectations of members are not addressed or are not really enforced.
- The work makes no sense to be done by a team; members have disaggregated it into smaller pieces and there is no real opportunity for teamwork.

Here are the ranges in the reported team size by team members. When there are large discrepancies in the reported number of team members, the team has porous or unclear boundaries:

**Smallest Reported: 6**

**Average: 6.2**

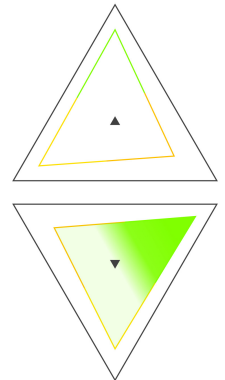
**Largest Reported: 7**

**Size: (a bit too small)**

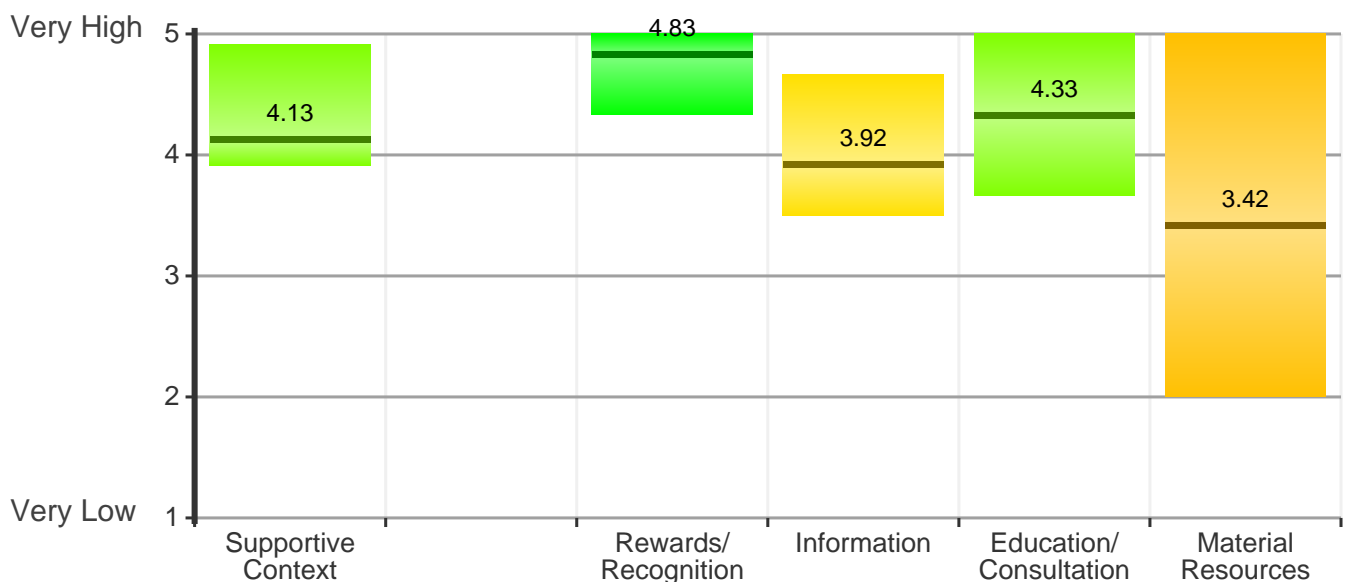
### Does the team operate in a Supportive Context?

#### Does the team operate in a Supportive Context?

**Supportive Context** means the organization's structures and systems promote rather than prevent teamwork. **Rewards and Recognition** means the organization pays for and celebrates excellent team (not just individual) performance. **Information** means teams get the data they need in a form they can use. **Education/Consultation** means that when teams encounter novel problems or need to improve their teamwork they can get training and technical consultation. **Material Resources** means that meeting space, computing resources, time—whatever the team needs—is made readily available.



#### Does the team operate in a Supportive Context?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

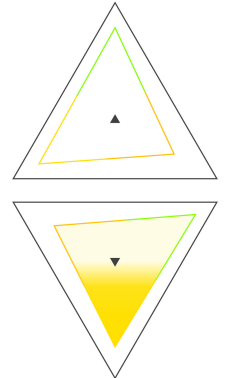
Teams with low scores on Supportive Context often suffer because:

- The reward system is designed to reward individual excellence.
- The organization skimps on training, or restricts resources.
- The information system produces data that is out of sync with the team's needs.

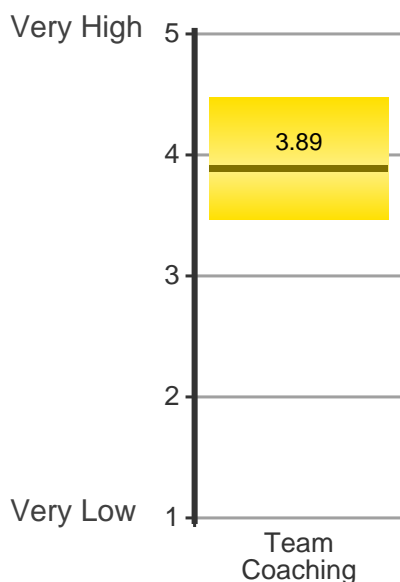
### Is Team Coaching available?

#### Is Team Coaching available?

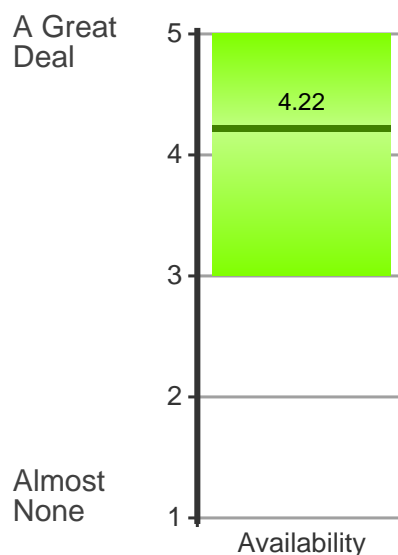
**Team Coaching** means someone is available to the team—a leader, a member, an external consultant—who pays attention to the team's process and intervenes at helpful moments. **Availability** means often or readily present for the team. **Helpfulness** means the person doing the coaching knows how and when to intervene.



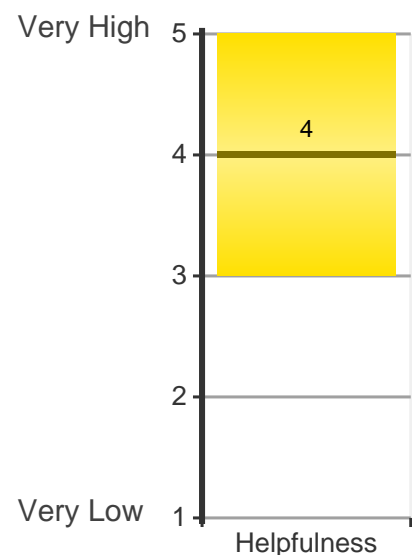
#### Team Coaching



#### Availability



#### Helpfulness



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

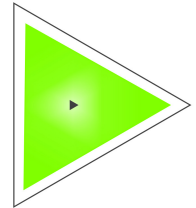
Teams have low **Team Coaching scores** when:

- There is no individual who holds accountability for providing ongoing coaching.
- No one in the team feels able or allowed to intervene in team process.
- Team coaches are difficult to access (in high demand, costly to the team).
- Coaching is focused on individual performance and not on the team as a whole.
- Coaching is viewed as a formal intervention in troubled teams, rather than an ongoing process for all teams.

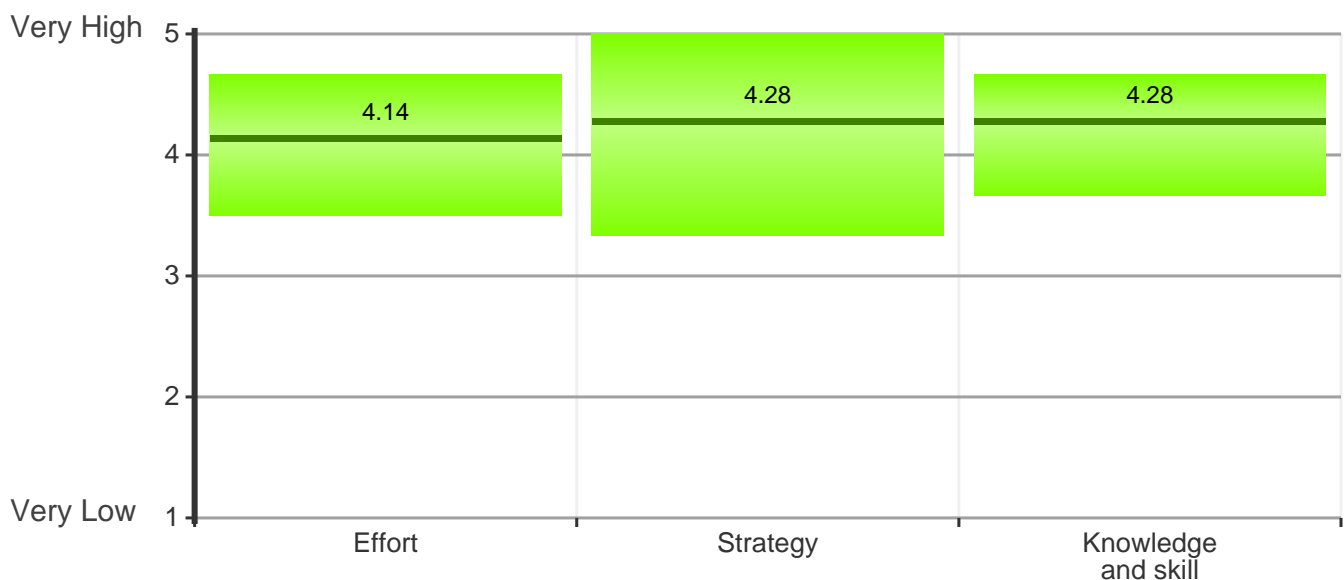
### Key Task Processes

#### Key Task Processes

Key Task Processes mean the ways that members are working together result in the team using its full capabilities to do the work well and the team is growing in capability. **Effort** is working in ways that build shared commitment to the work and the team. **Strategy** means inventing uniquely suited approaches to the work. **Knowledge and skill** is using member capabilities well.



#### Key Task Processes



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams with low scores on the Key Task Processes:

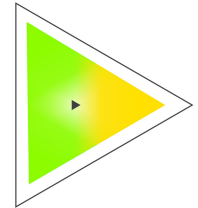
- Some members may be withdrawing their effort over time rather than carry too much.
- Members have trouble coordinating with each other to carry out their work plans.
- Some team members are not able to contribute because their views are not taken into account in the team's work.

Poor scores in Key Task Processes are signs that something needs attention in the **team design**. Consider: Is the purpose clear and compelling? Is it a Real Team, with the Right People? Look back at the team's scores on the Essentials and the Enablers, because these are the main drivers of the Task Processes in these graphs.

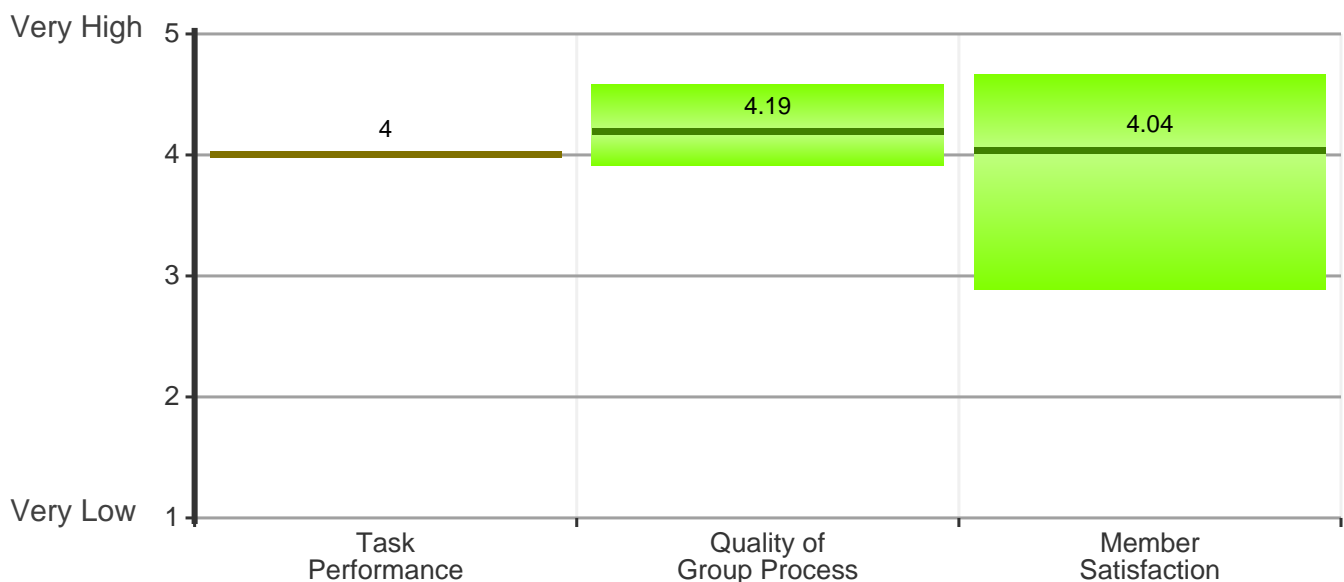
### Three Criteria of Team Effectiveness

#### Three Criteria of Team Effectiveness

The **Criteria of Team Effectiveness** mean that the team outcomes are excellent. **Task Performance** means the main clients or users of the team's work are satisfied with the quality, quantity, and timeliness of the team's work. **Quality of Group Process** means the group is becoming increasingly effective over time, not just for a one-time good performance. **Member Satisfaction** means that the team contributes to the learning, growth and satisfaction of its members. There are tradeoffs among these three outcomes in the short run (e.g., sometimes a team has to put task performance ahead of member learning), but great teams are able to make those tradeoffs and build positive outcomes on all three over time.



#### Team Effectiveness



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams with low scores on the criteria of Team Effectiveness:

- Have some clients of their work who are dissatisfied with what they get from the team.
- May be working in ways that get the job done but that undermine relationships and frustrate individuals along the way.
- Overfocus on one outcome—such as making sure members are comfortable—at the expense of others (such as paying attention to what their clients need).

Poor outcomes are signs that something needs attention in the **team design**. Consider: Is the Purpose compelling? Is it a Real Team, with the Right People? Look back at the team's scores on the Essentials and the Enablers, because these are the main drivers of effectiveness--and the best points of intervention to improve outcomes over time.



## Team Performance Metrics Self-report

### Team Performance Metrics Self-report

This chart summarizes the typical performance metrics this team's members believe are most important to their clients. This chart can help members reflect on the challenges and tradeoffs among their responsibilities and provides additional detail about the 1<sup>st</sup> Criterion of Effectiveness. The performance metrics are broken down by areas where the team believes their performance is superb, good, moderate, somewhat poor, and poor.

#### **Superb:**

##### **Good:**

Income from Trainings supports more trainings  
# of Teams Trained

A participant community organization's level of adoption of the leadership practices; their ability to teach others and spread the capacity

Amount of participation in any one program

New teams recruited to core programs

##### **Moderate:**

Greater justice engagement in community

Organizational and leadership clarity

#### **Somewhat poor:**

##### **Poor:**

## What is the main Purpose of the team? (Self-report)

### What is the main Purpose of the team? (Self-report)

This page lists how each member expresses in their own words the main purpose of the team.

Are their views aligned?

Where do they differ or overlap?

Does the purpose seem compelling to each?

What might make it more compelling?

Be a consultative and advisory body on org strategy and programming

To equip teams of leaders with the five leadership arts of community organizing. We also exist to animate citizens' depth of engagement in the world through volunteer work and capacity building practices.

Create effective citizen leaders

To advise the staff of our org on larger questions of strategy and mission

To guide the work of the org, set direction, attend to staff and financial management, cultivate new program opportunities.

To provide advice to the Core Strategy Team and the ED

### How well is the team's Purpose specified?

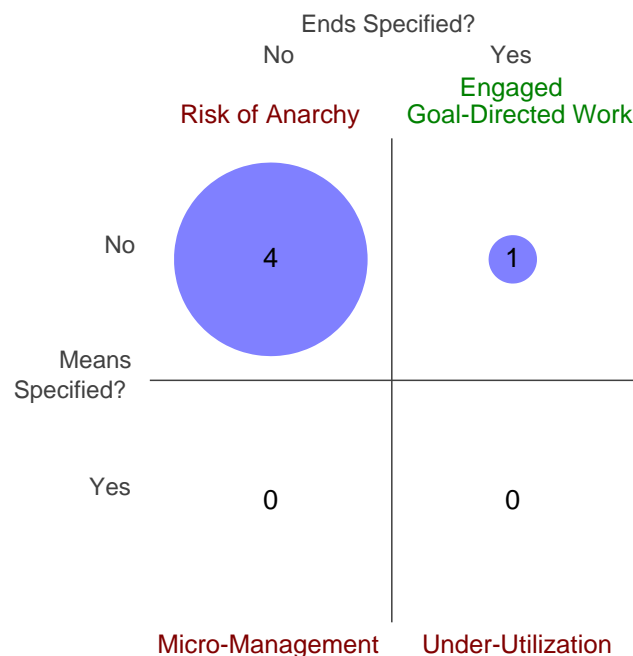
#### How well is the team's Purpose specified?

Teams benefit from a purpose that is crystal clear about *ends*—what the team exist to accomplish—and leaves plenty of room for the team to decide *means* to reach those ends.

In the diagram below, each team member indicated whether the team purpose is well-defined (*Ends* Yes vs. No) and whether someone also has specified the means they should use to get there (*Means* Yes vs. No).

Ideally, members agree that someone specified the ends, but not the means.

#### How well is the team's Purpose specified?



**Engaged, goal-directed work** - The upper right quadrant, is best.

**Risk of Anarchy** – when neither ends nor means are specified. Team members make independent decisions about what to do and how, creating fragmentation.

**Under-Utilization** – When both means and ends are specified, only one individual's knowledge (whoever specified the purpose) is truly being used.

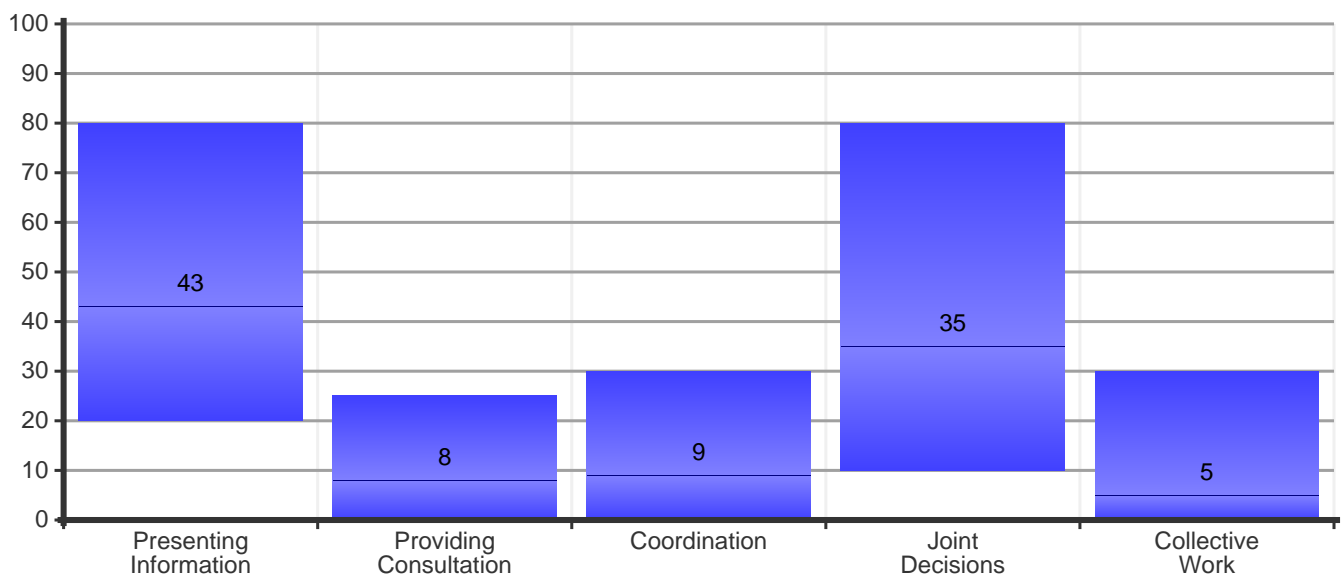
**Micro-Management** – When the purposes of the work, the end states, are unclear, but all the steps to get there are over-specified. This kind of Micro-Management, focused on the details of *what* the team does, and not *why*, is a serious problem for motivation.

### Team Types

#### Team Types

Teams differ in the main kinds of tasks they do. This chart summarizes the way the team spends its time when convened, from least interdependent to most interdependent. **Presenting information** means members update each other on individual work, **Providing Consultation** means members provide advice to each other so that individuals might do their own work more effectively. **Coordination** means that the team integrates individual tasks. **Joint Decisions** means the teams makes decisions together. **Collective Work** means the team performs interdependent work. The graph below summarizes the average amount of time the team reports spends on each.

#### Team Work in Meetings



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Note: Information about team types is especially helpful for leadership or management teams. Many leadership teams are teams in name only, because they spend the bulk of their time exchanging information that may only be relevant to a few members, and very little time making the critical leadership decisions needed by those they lead.

Consider:

What type of team is this most of the time?

What type of team *should* it be?

### How Much Authority Does the team have?

#### How Much Authority Does the team have?

Teams have different levels of authority over features that influence their performance. **Manager-led** teams have authority only to execute the work; all other key decisions are made by managers.

**Self-managing** teams also have authority to decide their task strategies, including the timing, sequencing, and allocation of tasks.

**Self-designing** teams also have authority to alter features of their own team. Specifically, **Self-designing Type 1** teams can invite new members or change their composition. **Self-designing Type 2** can allocate rewards. **Self-designing Type 3** can both change members and allocate rewards.

**Professional** teams can decide their purposes and manage their own work but have little control over membership.

**Self-governing led** teams form for their own purposes. They decide why they exist as a team at all and who will be part of that work

**Other** teams do not fit any of these typical forms.

#### Level of team authority



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Do members generally agree on how much authority they have?

What kind of authority do most members agree that they have?

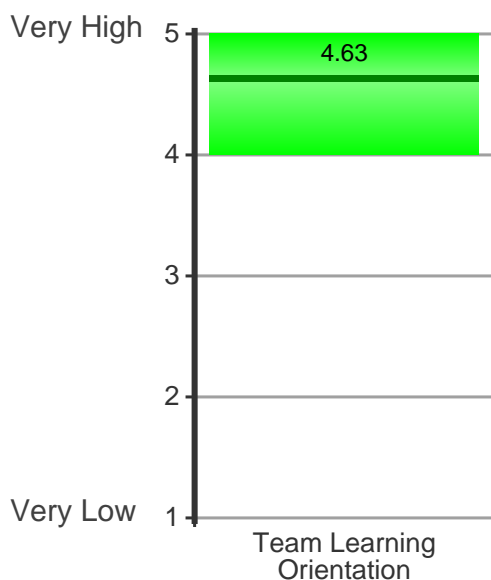
What kind of authority should they have? Consider whether the team itself (or someone outside the team) has the most knowledge and expertise to make decisions about these features of team design and functioning.

### Team Learning and Psychological Safety

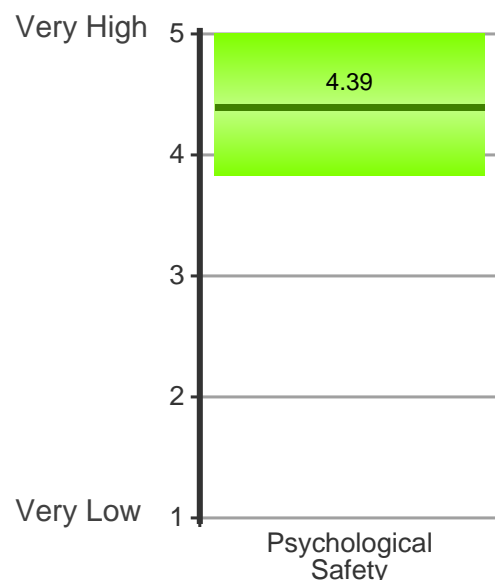
#### Team Learning and Psychological Safety

Teams that perform innovative work, deal with complex problems or that do knowledge work benefit from work processes within the team that promote risk-taking, learning, and experimentation. **Team Learning Orientation** means members encourage proactive learning and competence development for their members, expanding the team's capability. **Psychological Safety** means the team reinforces a belief that interpersonal and professional risk-taking is welcomed and supported in the team.

#### Team Learning Orientation



#### Psychological Safety



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Teams that score low on team learning orientation or on psychological safety tend to be teams in which members or the organization's norms emphasize performance over learning, and may to punish errors or discourage novel approaches.

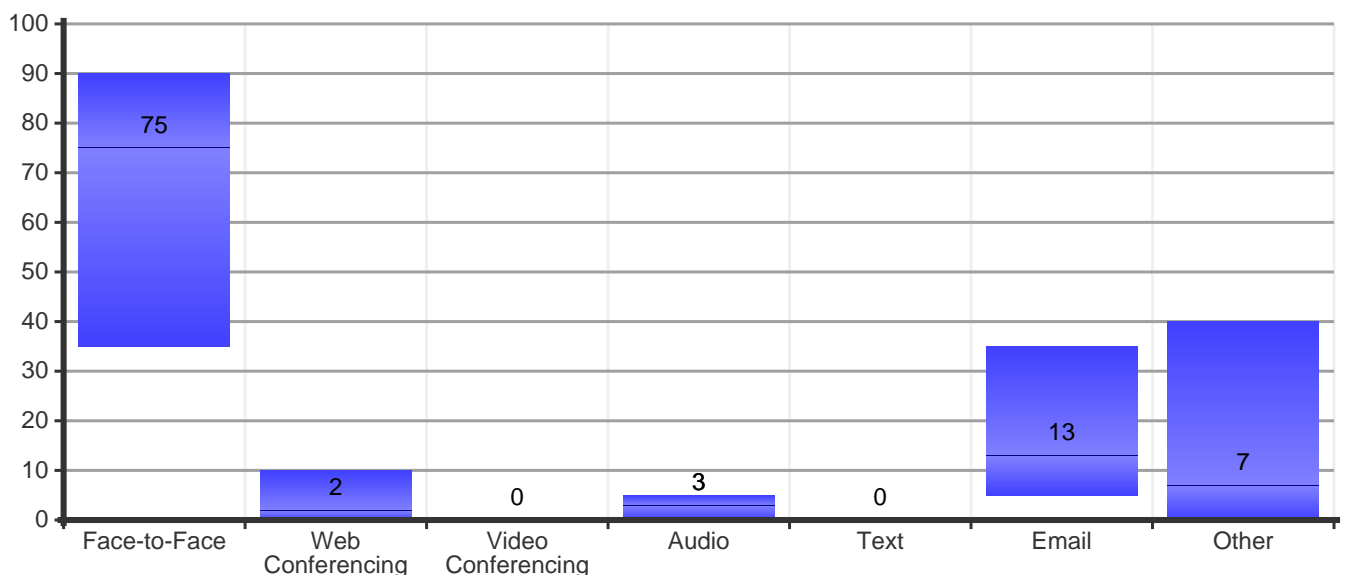


### Communication with Other Team Members

#### Communication with other team members

Teams use different media to coordinate and complete their work. The graph below summarizes what members say they use most and least frequently as a means of working together.

#### Communication with Other Team Members



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

There is no ideal mix of communications media for all teams; many teams benefit from taking advantage of multiple forms to manage the work. Complex problem-solving and conceptual work benefit from some face-to-face interaction, especially early in the life of the group. Given the purposes and tasks of this team, what forms of communication are most helpful? Underutilized?

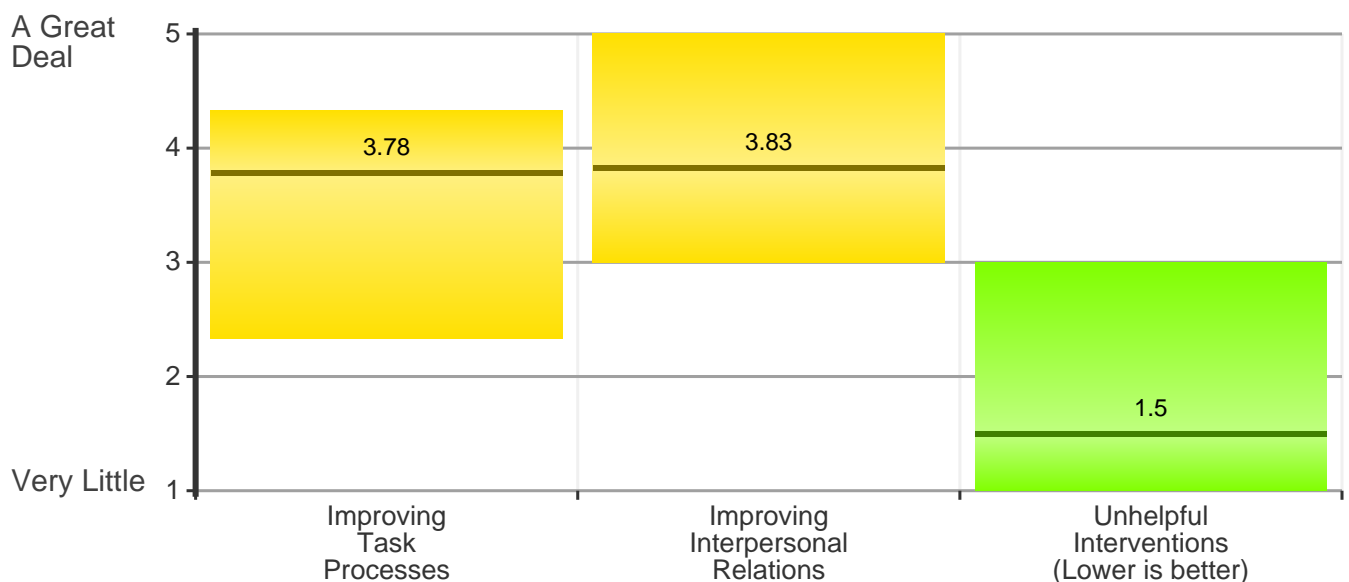
### Team Self-Coaching

#### What kind of coaching do the team members themselves do?

Members can provide helpful coaching to the team. This chart summarizes the amount of time team members spend on Task vs. Interpersonal vs. Unhelpful coaching

**Improving Task Processes** is coaching focused on helping members make the best use of their knowledge, skill, and experience in doing the work. **Improving Interpersonal Relations** is dealing with conflicts and building positive feelings among team members. **Unhelpful Interventions** is telling the team its problems and how to solve them.

#### What kind of coaching do members provide?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

- Task coaching should be high. It is helpful to team effectiveness.
- The amount of interpersonal coaching should be moderate or low. This kind of coaching is more often a distraction than a helpful intervention.
- Unhelpful Interventions should be very low. This kind of coaching undermines team self-management.

## Designated Team Leader

### Does the team have a designated team leader?

Number of members responding Yes vs. No

0 No, leadership is shared among team members.

0 There is no designated team leader but a particular individual acts as informal team leader.

6 Yes, there is a designated leader of the team.

### Reported Leader

NM

AC

NM - or the new ED, so can't answer

NM

NM

NM

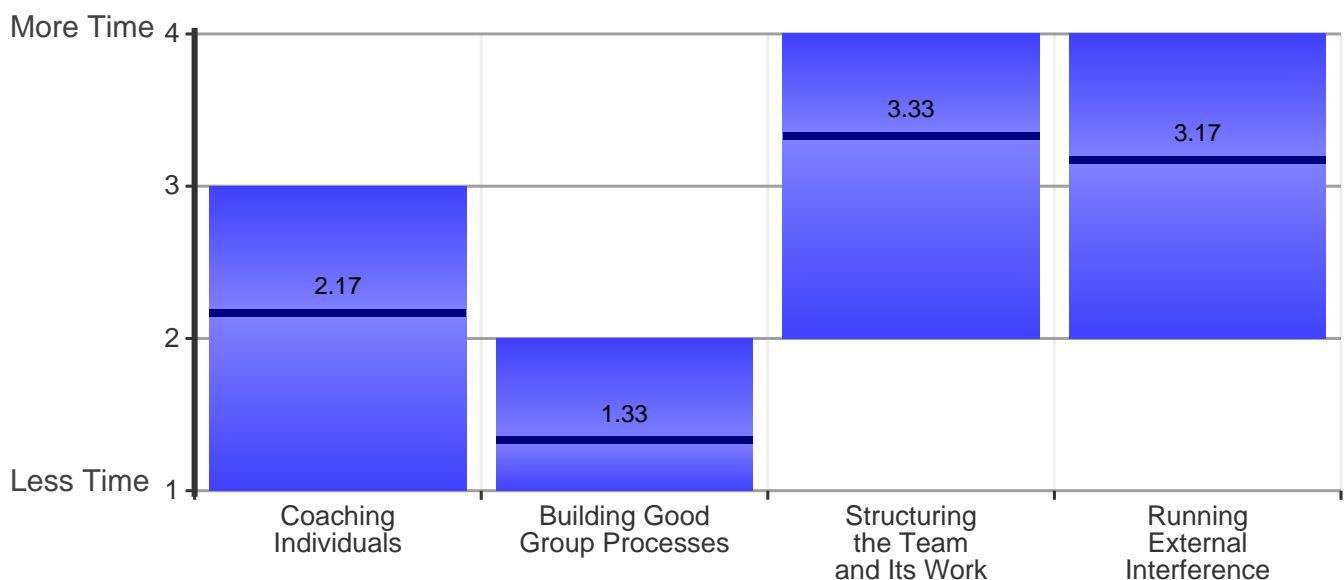
### Focus of Team Leader's Activities

#### Focus of team leader's activities

Team leaders can spend their time in four distinct kinds of leadership activities, all of which can be helpful to the team. This chart summarizes the relative amount of time the leader spends in these activities:

**Coaching Individuals** is providing feedback and intervention into the behavior and performance of individual team members. **Building Good Group Processes** is coaching the team as a whole to develop their effectiveness. **Structuring the Team and Its Work** is designing the team, choosing members, clarifying purposes. **Running External Interference** is making sure that the team has the resources, authority, and legitimacy it needs to accomplish its purposes.

#### Focus of Team Leader's Activities



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Of these four activities, 2, 3, and 4 should get relatively more of the leader's time. Coaching individuals should come last, because this activity is relatively more effective when the team is already well designed, well structured, and well coached.

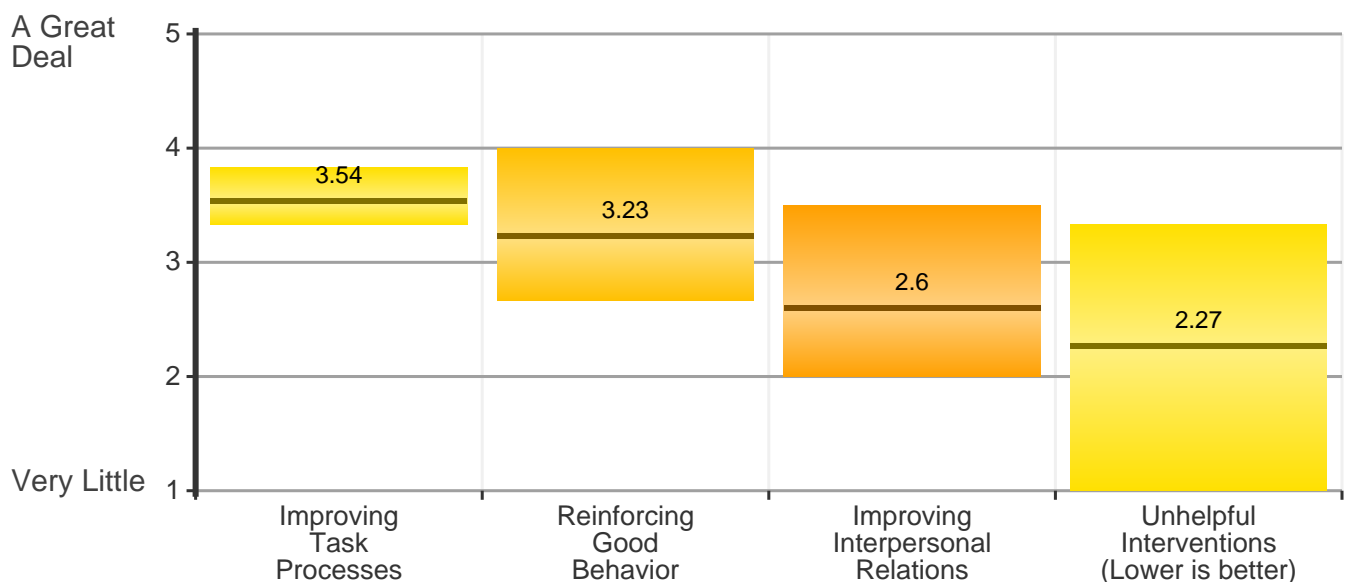
Which leadership activities are getting relatively more of the leader's attention?  
Which leadership activities need more attention?

### Coaching provided by leader

#### What kind of coaching does the leader provide?

This chart focuses on the coaching behavior of the designated team leader. Coaching refers to direct intervention into the team's processes to improve the team's functioning and performance. There are four kinds of coaching that are commonly seen in leaders' coaching. Not all are helpful. **Improving Task Processes** is coaching focused on helping members make the best use of their knowledge, skill, and experience in doing the work. **Reinforcing Good Behavior** is providing positive feedback for desired behaviour. **Improving Interpersonal Relations** is dealing with conflicts and building positive feelings among team members; and **Unhelpful Interventions** is telling the team its problems and how to solve them. The graph below summarizes how much of his or her time the team leader spends providing each of these kinds of coaching.

#### What kind of coaching does the leader provide?



#### USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Task and Reinforcing coaching should be high. Both forms of coaching are helpful to team effectiveness.

The amount of interpersonal coaching should be moderate or low. This kind of coaching is more often a distraction than a helpful intervention.

Unhelpful Interventions should be very low. This kind of coaching undermines team self-management.

**Preserve to contribute to team effectiveness Self-report**

The level of commitment we all have to the work

Practicing what we preach—we use our collaborative leadership practices in our own work

We collaborate well, mutual support

Passionate engagement

Everyone is doing this work out of love and we bring our best to it

This is one of the best teams I have every been part of, personally and professionally



## Change to improve team effectiveness Self-report

I don't think it is clear where we are headed as an organization

Chasing opportunities, no clear priorities

I sometimes feel we are not making good use of our time as a leadership team We are stretched too thin

WE don't agree about what we should be pursuing

I think we are all waiting for NM to set the direction

There is conflict that isn't getting surfaced