



unfold the page to find the Team Performance Inventory tool

Instructions: Have each team member complete the Inventory form individually, and then come together as a group to discuss your responses to help figure out where your teamwork is strong and where it can be improved. Then, together, come up with at least one way to improve your team process.

The **Team Performance Inventory** is helpful tool for that kind of temperature check conversation.

Great teams do well by knowing that there is always room for growth. Teams that have been working together for a while can benefit from a periodic assessment of how the team is doing as a team.

Team Performance Inventory how are we doing as a team?



STEP ONE

Form a Great Team

the foundation of any worker cooperative

Directions

1. Circle the number that best expresses your opinion next to each statement below.
2. Share and discuss your responses with your team to figure out where your teamwork is strong and where less so.. Pick one way to improve.

TEAM PERFORMANCE INVENTORY

1 not at all **2** **3** **4** **5** absolutely

1 not at all **2** **3** **4** **5** absolutely

1 We say what we really feel and believe in our team meetings. 1 2 3 4 5

2 We listen to each other. 1 2 3 4 5

3 We deal with conflict creatively and constructively. 1 2 3 4 5

4 We challenge and support each other to our highest levels of performance. 1 2 3 4 5

5 We provide ongoing, honest, and useful feedback to each other. 1 2 3 4 5

6 Team leadership is flexible, shifting in style to meet the needs of the situation. 1 2 3 4 5

7 We put the team's success before our personal agendas. 1 2 3 4 5

8 We respond and adapt well to changing circumstances. 1 2 3 4 5

9 All members of the team actively (and appropriately) participate in our meetings. 1 2 3 4 5

10 Decisions are made only after those with useful input have participated. 1 2 3 4 5

11 We respect and support each other, personally and professionally 1 2 3 4 5

12 Our team has a high degree of team spirit and energy. 1 2 3 4 5

13 We are continually learning and improving our performance. 1 2 3 4 5

14 We use measurements effectively to improve performance. 1 2 3 4 5

15 We all share the same understanding of where we are going. 1 2 3 4 5

16 Our goals are translated into clear plans with dates and accountability. 1 2 3 4 5

17 Our team is really focused on getting the results most important for the success of our mission (rather than activity). 1 2 3 4 5

18 Our team process comes up with the best solutions to the challenges we face. 1 2 3 4 5

19 We use our time efficiently in meetings. 1 2 3 4 5

20 We follow through on our commitments and hold each other accountable. 1 2 3 4 5

- Meeting Notes:** Use something like the Meeting Notes Template tool to keep a running record of participants, agendas, decisions, and task assignments.
- For each meeting:
- Decide on meeting roles before each meeting.
 - Set your meeting agenda before you start. Check tasks from the previous meeting to prioritize agenda items.
 - Assign times to each agenda item to stay on track.
 - Keep a running list of tasks that come up during the meeting
 - Make time at the beginning of the meeting to check in with each other and go over the previous meeting's tasks.
 - At the end of the meeting, schedule your next meeting date and known agenda items.



unfold the page to find the Meeting Notes Template tool

The purpose of this tool is to get you, as an individual, in closer touch with what you have to offer a team by identifying the complex of personal qualities that make up your talents. The tool can also provide you with some insight into what kind of co-op business might be a good match for what is important to you.

To help you figure that out, the tool asks you to think about your **gifts** — the things that you were born to do; your **loves** — the things that you enjoy doing; and your **skills** — things that you have learned to do over time. To add additional perspective, we have also included a short survey for a friend or family member to reflect on what they know about you.

What this all boils down to is this: the places where your gifts, loves, and skills intersect — where they repeat — are important clues to the talents that make up your entrepreneurial self.



Discover Your Entrepreneurial Self about you

Tools for Teams

Most fundamental to any worker cooperative is its people. And, the extent to which those people are organized as a great team with shared values, shared enterprise and diverse skills, perspectives and personalities is crucial to cooperative success.

In this short booklet we will introduce you to six tools to help you analyze, support, and improve your team, starting with you!

1. **About You:** Discover your entrepreneurial self.
2. **Spectrogram:** See how we show up. Differently.
3. **Team Assessment:** Shared values. Diverse personalities.
4. **Business Model Canvas:** Placing workers front and center.
5. **Tracking Device:** Organizing and tracking meeting notes.
6. **Team Performance Inventory:** How are we doing as a team?

The tools are hidden inside the booklet. More about that as we go.

[insert date] Meeting Notes Template

Team members present: [list team members present in the meeting]

Meeting Roles:

- **Facilitator:** [insert name]
- **Note-taker:** [insert name]
- **Timekeeper:** [insert name]

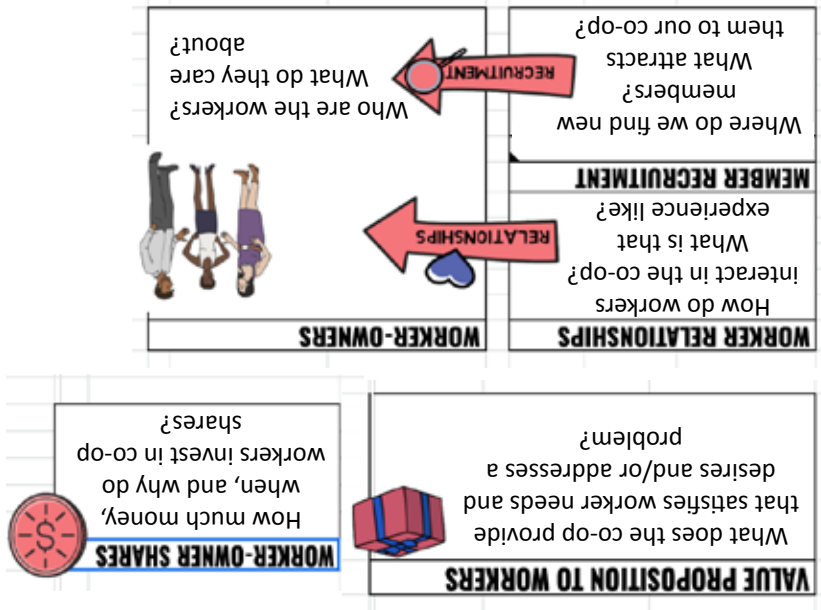
Tasks:

- [insert task] → [insert name of person responsible] by [insert deadline]

AGENDA

- Check-in – **10 minutes**
- Review proposed agenda & adjust as needed – **5 minutes**
- Go over previous meeting's tasks – **5 minutes**
- [insert agenda item] – **[insert time allotted]**
- [insert agenda item] – **[insert time allotted]**
- [insert agenda item] – **[insert time allotted]**
- Review tasks assigned during the meeting – **5 minutes**
- Schedule next meeting date – **5 minutes**

Next meeting: [insert date + time + known agenda items]



- How to play:**
1. Write your name (and your teammates') on one of the attached dots.
 2. Place the dot where your response would fall on the spectrogram.
 3. Notice how your responses are the same and how they are different.
 4. Ask each other why they placed themselves there.
 5. Appreciate your teammates.

In an in-person workshop, we use the Spectrogram to distribute ourselves physically as a way to respond to a question, and then explore why people picked their spot. So here's our paper version. You can do the exercise as a team; or, if you are by yourself, pick your own spot on the line and imagine where your teammates might place themselves.

Spectrogram how we show up, differently.

5 Tracking Device organizing and tracking meeting notes.

Worker co-ops have many meetings and a lot of what makes meetings great has to do with preparation. Here are some best practices:

Community Agreements help set shared expectations of how your team will work together respectfully and effectively. This, in turn enables people to interact more cooperatively and respectfully. It is best to generate these as a co-op and refer back to them from time to time.

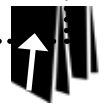
Examples:

- **One Mic:** we agree to actively listen when someone is talking and do not speak over each other.
- **Participate!**
- **Be Conscious of Time:** Help stick to it or negotiate for more.
- **Step Up, Step Back:** Make sure everyone is able to contribute.

What Are Your TALENTS?
where do your gifts, loves and skills intersect?



unfold the page to find the Entrepreneurial Self tool
& a short form for a friend or family member to complete (about you!)



Discover Your Entrepreneurial Self

NAME _____

1. What Are Your Gifts?

Things you were born to do

1. What comes easily to you?
2. What are the areas where others have said "I wish I could do that as well as you?"
3. Take five minutes to think about only this: What are your natural gifts?
4. Ask a friend or family member who knows you well to fill out the attached form that asks questions about how they think about your gifts.

2. What Are Your Loves?

Things you enjoy doing

1. What were the favorite parts of jobs or responsibilities or hobbies that you have had? What did you like so much?
2. If money were no object, what would you do for a job or career?
3. What work activities do you get lost in?
4. Take five minutes to think about only this: What kind of work do you love the most?

3. What Are Your Skills?

Things you have learned to do over time

1. What are some job skills you have from training or experience?
2. What are your strongest personal skills that you bring to a job or task? (attitude, responsibility, ethics, initiative, etc.)
3. What roles do you typically take on a team?
4. What are some other fundamental skills that you possess? (i.e. communication, managing information, using numbers, problem-solving).

My Gifts Are:

My Loves Are:

My Skills Are:

My Talents Are: *Where do your Gifts and Loves and Skills Intersect? What themes keep coming up, including those from your friend or family member? These are likely your TALENTS.*



unfold this page to find the Team Assessment tool. instructions included.

For example, if every member of your team is exceptionally cautious about risk or conflict, you might miss some good opportunities or have difficulty making tough decisions. Alternatively, if everyone is a big risk-taker, you might find yourselves jumping off too many cliffs. In teams, as in nature, diversity is a key to resilience. The point here isn't to denigrate a team that came together around really strong commonalities. That is a strength. The point is to be aware of where gaps may exist, and with that understanding, build ways and means to shore up areas in which your team may have some vulnerabilities.



The **Team Assessment** tool provides a view of the shared, core values that are held in common by your team — values that are so important that they are essential, non-negotiable, and help make your team a team. Surrounding these values are individual qualities of skill, personality, and attitude that likely emerged from the previous exercises. With respect to skills, consider those that are beyond trade skill to include aspects of operations, management, and relationships. The purpose of the tool is to provide a snapshot of your team's balance.

Team Assessment shared values, diverse personalities.

4 Worker-Owner Business Model Canvas placing workers front and center.

Step Two of this series is all about building a business model for your co-op, and to accomplish that, L.A. Co-op Lab has adapted the popular Business Model Canvas design to better accommodate the project of creating a worker-owned business.

In keeping with our purpose, we have added five worker-centered elements to the canvas along with key questions they pose for worker-owners.



They are included here because they have a lot to do with forming a great team.

A worker co-op is essentially a team business.

these 5 new elements were built from a conversation with Joseph Cureton, Obran Co-op

Put Your Name on the Spectrum

Write your name on a dot. Place the dot where your response fits best.

I am an optimist. I generally think everything is going to be OK.	I am cautious. I try to foresee problems before they arise.
I am comfortable facing conflict head on.	I avoid conflict at all costs.
It takes a lot for me to fully trust someone.	I trust people easily.

Team Assessment

In the outer layers of the circle, list the qualities that resonate with you as an individual.

With your team members, identify your shared bottom-line values and write them in the center circle.

Team Discussion

From your team, whose skill-sets and qualities complement one another?

Is there a skillset or area that is under-represented or over-represented?

How will you fill the gaps?

