

Setting Up Team Roles & Routines

Modify this template as needed to meet your team's needs and what your team may have already discussed.

Time	Protocol	Notes
10 min.	Opening, and set up for a productive meeting • Go-round check-in • Review agenda and make updates as needed • Decide on meeting roles ◦ Facilitator ◦ Notetaker ◦ Timekeeper • Orient team to where materials are shared (Drive, Dropbox, OneDrive, etc.)	
15 min.	Discuss and decide on team norms • Decide on norms or community agreements about how to work as a team • Decide on a plan to ensure that norms are maintained Process [10 min] • Take a couple minutes to write suggested norms individually on sticky notes • Group items that are similar and label categories • Then discuss and record selected norms or community agreements as a group	
10 min.	Clarify team roles • What tasks will the team lead take on? • What will team members take on? • How will the organizational leaders stay involved in the work of the team? Will they attend some team meetings or participate in any of the inquiry activities? Which ones?	
5+ min.	Orientation to the current work • Review why the team has formed and what its charge is (ex: investigating a problem or testing specific changes aligned to a theory of improvement) • Plan next steps, such as: ◦ Decide on what data to collect or change(s) to test within the next week and who will do them ◦ If conducting a PDSA, complete plan section of PDSA form	
5 min.	Review key decisions and next steps, including planning next meetings • Set huddle dates and times • Set consolidation meeting date, time, and participants	
5 min.	Evaluate meeting • What went well? • What could make this even better next time?	