

# Change Team Core Processes and Tools

## Set-Up and Management Checklist

Change teams designed to increase diversity, equity, and inclusion (DEI) require thoughtful planning and communication throughout the active lifecycle of the team: Launch, Management, Evaluation, and Relaunch. Change teams, like any other team, require management tools, skills, and processes to be successful.

Use the following checklists to create the change team charter and core management tools and processes. These preparatory steps allow the team to spend more time focused on advancing the organizational DEI goals, and less time troubleshooting preventable team management issues.

### Change Team Core Elements – Team Charter

Before inviting people to serve on the team, create a charter that outlines the purpose, scope, strategy, composition, and resources of the team. These initial elements can be grouped into: WHO, WHAT, WHEN, WHERE, and WHY. The charter should be revisited every year to ensure it reflects team needs and direction.

- ☐ Change Team Purpose (The WHY)
  - Why is this team being created? What is the story behind this team and effort?
- ☐ Change Team Scope or Focus (The WHAT)
  - Connect this to your organizational mission or strategic plan
  - The breadth of your scope or focus can quickly become too broad. Create a focus that meets your current capacity. It can always expand as more resources and capacity become available.
- ☐ Change Team Strategy (The HOW)
  - You might spend your first few months identifying your strategy
  - How will you meet the goals outlined in the Scope or Focus?
- ☐ Change Team Composition and Leadership Structure (The WHO)
  - Will there be team leads or will leadership be shared across the team?
  - How many members and leads will serve per year?

- Identify the Executive sponsor (often this is the person who currently hold positional power, e.g. Executive Director)
- Will the Executive Sponsor be an equal member on the team or a partner?

☐ Change Team Tenure and Transition Plan (The WHEN and WHERE)

- How long to leads and members serve on the team?
- How does membership and leadership rotate?
- How will knowledge and skills be transferred to the new team? Most teams plan for staggered membership to share the load and ensure current team members or leads and train new people.
  - Will the team meet remotely, in-person, or is it a hybrid of both?

☐ Change Team Resources (The HOW)

- Human
  - Remember to create a hierarchically diverse team
- Financial
  - Additional pay for team members
  - Financial resources to upskill the steam
  - Financial resources to pay for change team activities, e.g. training dollars, data collection services, consultancy services, etc.
- Time
  - How often will the change team meet and for how long?

## Change Team Core Elements – Management & Operations

The following tools and processes increase the change team’s capacity to create goals and tasks, track progress, and communicate internally and externally to the staff and board. Your organization may already have tools on this checklist. You can apply them to change team business or create your own.

☐ Change Team Invitation - This invitation contains charter information and asks candidates to share why they are interested in joining the team. Consider using [the questions provided in this Equity Team resource](#) by Cultures Connecting, LLC.

☐ Group Agreements. These statements create guidelines for trusting and respectful communication and participation. There are many types of group agreements! One of TREC’s favorites is: “Be gentle on the person and tough on the issue.” By Dr. Bill Vaughn. [Get creative and draft your own](#) or search the web.

☐ Shared Note Taking Space and Document Storage

☐ Facilitator and Note Taker Schedule

☐ Meeting Agenda Template ([POPP](#))

☐ Goal Setting Template. The Management Center has an excellent framework for creating DEI goals that are equitable and inclusive. [Check out their tools and worksheet here.](#)

☐ Yearly or mid-yearly feedback/evaluation

☐ [Work Plan/Action Plan/Development Plan](#)

☐ Communications Plan (How will you communicate internally as a team and externally with the Staff, ED, and Board?)

☐ Calendar of Events (Change Team Internal Activity and External Activity with Staff, ED, and Board)

☐ Change Team Contact point for staff and/or consultants

☐ [Decision Making Process](#)