

## Leadership Team Evaluation Guidelines

Once you've decided to use the Leadership Team Evaluation with your team, these guidelines will help you to address it successfully with your group:

**1. Review the Leadership Team Evaluation document.**

- Change the values on question 3 to your values
- Determine that the statements and descriptions meet your company and team needs
  - These questions have been created with engagement in mind; use caution if changing questions
- The rating scale should remain 1 – 10
- Comment boxes are not included purposely – the results of this survey are meant as a conversation starter. Comments will come during the subsequent discussion.

**2. During a team meeting, preface the exercise by stating:**

*I'd like to do an evaluation of where we think our leadership team stands as a whole by doing a quick survey. Please complete this survey as honestly as possible – all answers will remain anonymous and we will only see the cumulative results. Once you are done, please put the survey in this envelope.*

**3. Hand out the blank evaluations to everyone (including yourself) and provide whatever**

**4. Give the surveys to someone to tally on the Excel spreadsheet and continue with the meeting**

- Data should be tallied and double checked for accuracy
- Print the report on the 'Report' tab (enough for one per team member)

**5. Discuss results, identifying lows and highs, and encouraging comments. An action plan could result from this discussion**

## Instructions for Using the Excel File

1. Enter the Leadership Team name and current date
2. Take the first survey and enter the scores of each question vertically in the cells on the spreadsheet under 'Survey #1'. See example on Excel spreadsheet.
3. Repeat for each survey
4. Double check entries
5. Click the 'Report' tab and print the report (best in color), one for each participant
6. Put reports in an envelope and return to the team leader
7. Destroy original surveys

### Leadership Team Evaluation

Read the 10 statements and corresponding notes. Rate our Leadership Team on each statement using a scale of 1 – 10 (see Rating Key below). After rating the 8 statements, circle the stage of development you feel this team is in.

Results will be tabulated and displayed as a benchmark.

#### Rating Key

- 1 = Not at all
- 10 = Excels at this

**1** ***Our Leadership Team makes decisions unselfishly, for the greater good of the company***      1    2    3    4    5    6    7    8    9    10

- We don't make decisions in our own self interest

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**2** ***Our Leadership Team is seen by its employees as aligned on mission, strategy, goals, and priorities***      1    2    3    4    5    6    7    8    9    10

- We focus and align in one consistent direction
- We behave in a way that supports this focus

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**3** ***Our Leadership Team 'walks the talk'; we live the values the organization stands for***      1    2    3    4    5    6    7    8    9    10

Our mutual commitments and values:

- Integrity
- Respect
- Balance
- Open Communications
- Flexibility
- Safety
- Innovation

*Note: These are sample values – insert the values for your company*

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**4** ***Our Leadership Team automatically and consistently 'assumes the best intentions' in one another***      1    2    3    4    5    6    7    8    9    10

- We do not assume 'motives', especially when we disagree
- All team members assume that teammates want what is best for the organization
- It is okay to have different opinions, but the team can engage in an open and respectful discussion