Introduction to the Team Guidelines Survey Template

The Team Guidelines Survey Template serves as a tool, used by the project team, to assess their progress toward enacting the team’s behavior guidelines. Each guideline is assessed based on statements regarding the group’s performance with regards to that guideline, and assigned a numerical score. The Team Guidelines Survey assists the OCM Practitioner, Project Manager, and project team in identifying guidelines to improve on throughout the project lifecycle. The survey may be administered multiple times throughout the project to serve as a “pulse check” for the project team.

Instructions and descriptions are provided to help the reader understand the assessment’s purpose and how to complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | [Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

Team Guidelines Survey Template

[Once the OCM Practitioner, working with the Project Manager have identified and introduced the team behavior guidelines, the Team Guidelines Survey should be administered. The survey should be completed by each project team member as a hard copy or electronic survey.

In the table below, have each team member score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. Once all team members have completed the survey, collect the surveys and compile the results to be used as discussion points in future team sessions.]

|  | Strongly  Disagree | | | Strongly  Agree | | |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | | | | | |
| Team Guidelines Survey |  |  |  | |  |  |
| 1. Members of the project team *show respect to all team members.* | 1 | 2 | 3 | | 4 | 5 |
| 1. Members of the project team *support and promote teamwork within the team and with outside resources.* | 1 | 2 | 3 | | 4 | 5 |
| 1. Members of the project team [insert team guideline]. | 1 | 2 | 3 | | 4 | 5 |
| 1. Members of the project team [insert team guideline]. | 1 | 2 | 3 | | 4 | 5 |
| 1. Members of the project team [insert team guideline]. | 1 | 2 | 3 | | 4 | 5 |
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