

Team Leader Checklist and Orientation

Checklist	Assessment
<p>Information to Know</p> <ol style="list-style-type: none"> 1. Gather Information <ol style="list-style-type: none"> a. Clients Scheduling <ol style="list-style-type: none"> i. What days and hours they are with WIN? ii. Transportation arrangements to/from parents (if applicable) b. Staffing Scheduling <ol style="list-style-type: none"> i. Who are your staff? ii. What are their positions (FT, PT, Casual) iii. What is the staffing rotation? c. Legalities <ol style="list-style-type: none"> i. Who is legal guardian/trustee of clients? ii. Are consents signed, and what is consented to? – (Medications, photos, release of information) d. Financials <ol style="list-style-type: none"> i. Who manages the finances for everyone? ii. What are the processes for spending, bills, and ledgers? 2. Clients <ol style="list-style-type: none"> a. Support Needs <ol style="list-style-type: none"> i. Who is the funder? <ol style="list-style-type: none"> 1. Persons with Developmental Disabilities (PDD) 2. Family Supports for Children with Disabilities (FSCD) 3. Alberta Brain Injury Network (ABIN) 4. Albert Health (AH) ii. Positive approaches? iii. Restrictive procedures? b. PCP Plan - ISP <ol style="list-style-type: none"> i. Getting to know everyone ii. Goals c. Health Needs <ol style="list-style-type: none"> i. Who is the doctor and pharmacist? ii. What medications are being taken? iii. Who administers, and what is the procedure for each? iv. Other medical needs? d. Family Connections <ol style="list-style-type: none"> i. Contact information 3. House Information <ol style="list-style-type: none"> a. Units allotted each, as well as overlap (if applicable) b. Household Responsibilities <ol style="list-style-type: none"> i. Grocery Shopping 	

- ii. Bill paying
- iii. Cleaning
- iv. Cooking
- v. Lease/Rental Agreement obligations/responsibilities

Responsibilities

Daily/Weekly Duties:

- Compare and approve PayWorks and OT Reports with Lognotes
- Family communication on an as needed basis
- Check travel claims for accuracy and approve/disapprove
- Manage team communication
- Check your Team Leader file at the office
- Comment on incident reports on an as needed basis
- Read through lognotes, family communication, communication notes, health notes, etc.
- Check email for house and Team Lead account
- Update HR notes for staff as needed – positives as well as required performance conversations
- Ensure household responsibilities are getting done
 - o Grocery shopping
 - o Bills being paid
 - Rent
 - Utilities
 - WIN Expense bills
 - Other personal/program specific bills (music, club fees, etc.)
 - o Picking up Mail
 - o Wallet counts done daily
 - o Water checks done for those that require support in bathing

Monthly Duties:

- Schedule for the following month is due on the 15th of the month
- Quarterly Reports are due on the 10th
- Check medications
 - o Back-up meds checked
 - o PRN meds checked
 - o Medication sign sheet checked
 - o Medications picked up and checked for accuracy
- Schedule team meetings a minimum of quarterly, as required - time to be determined
- Attend Team Leader meetings (must attend a minimum of once every quarter)

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- Ensure that the stand-in team lead is scheduled to alternate attendance at meetings
- Ensure the team is scheduled to attend general staff meetings (minimum of 1 staff per program)
- Check and approve time off requests
- Ensure that staff are scheduled to attend mandatory training
- Approve travel claims by the 7th of the month
- Obtain bank statements and balance all ledgers
- Receipts filed appropriately or sent to guardians
- Fire Drill completed
- Safety equipment check
 - o Fire extinguishers
 - o Smoke detectors
 - o Carbon Monoxide detectors
 - o 72- Hour Kit stocked
 - o First-Aid Kit stocked
 - o Universal Precautions Kit stocked
- Water check for the house and individuals done
- House calendar updated
- House menu created
- After each medication change:
 - o MAR to Michelle to get a new medication sign sheet
 - o New sign sheet to house ASAP to update in medication book, emergency binder, and **vial of life**
- Ensure staff are scheduled to attend mandatory training as needed
- Schedule and attend 1:1's with Coordinator minimum of quarterly
- Ensure goals are being recorded properly, and worked on regularly
- Check in with families, parents, guardians, etc.
- Review with the team and comment back on Incident Reports to committees (Risk Management and Best Practices)

Annual Duties:

- Performance evaluations done for all staff
- Taxes done for all individuals
- Annual planning meetings
 - o One-page profile
 - o House orientation
 - o Update photo
 - o Update fact sheet
 - o Update Vial of Life
 - o Update consents – check file
 - o Update Dr. Standing orders
 - o Update goals

- Update emergency binders (fire plans, tornado plan, 72-hour plan, risks)
- File reviews
- Update Greensleeves
- Med reviews done for everyone
- Annual safety check done (Sharevision)
- Ensure staff are appropriately orientated for Behaviour Support Plans and any amendments
- Ensure staff have used float days
- Dental appointments done
- Eye appointments done

Need to Know:

Float Days- annually each staff gets one, and renews April 1st. This can be seen on the pay stub.

Pay Stubs- current accrual is what was earned that month, YTD accrual is the total of time you have available to use

Sick Time- To be used for yourself only (not dependents). Covers days that you are not well enough to work and/or days that you have medical appointments. Medical appointments in the city have a cap of 4 hours that can be used. 3 days off or more requires a sick note.

Vacation Time- Is approved for the team after everyone has had the chance to put time in- ex. Summer vacation is approved in May. If there are multiples booking the same time off, use the process to determine who gets it.

Team Lead and Stand In can not both be off at the same time.

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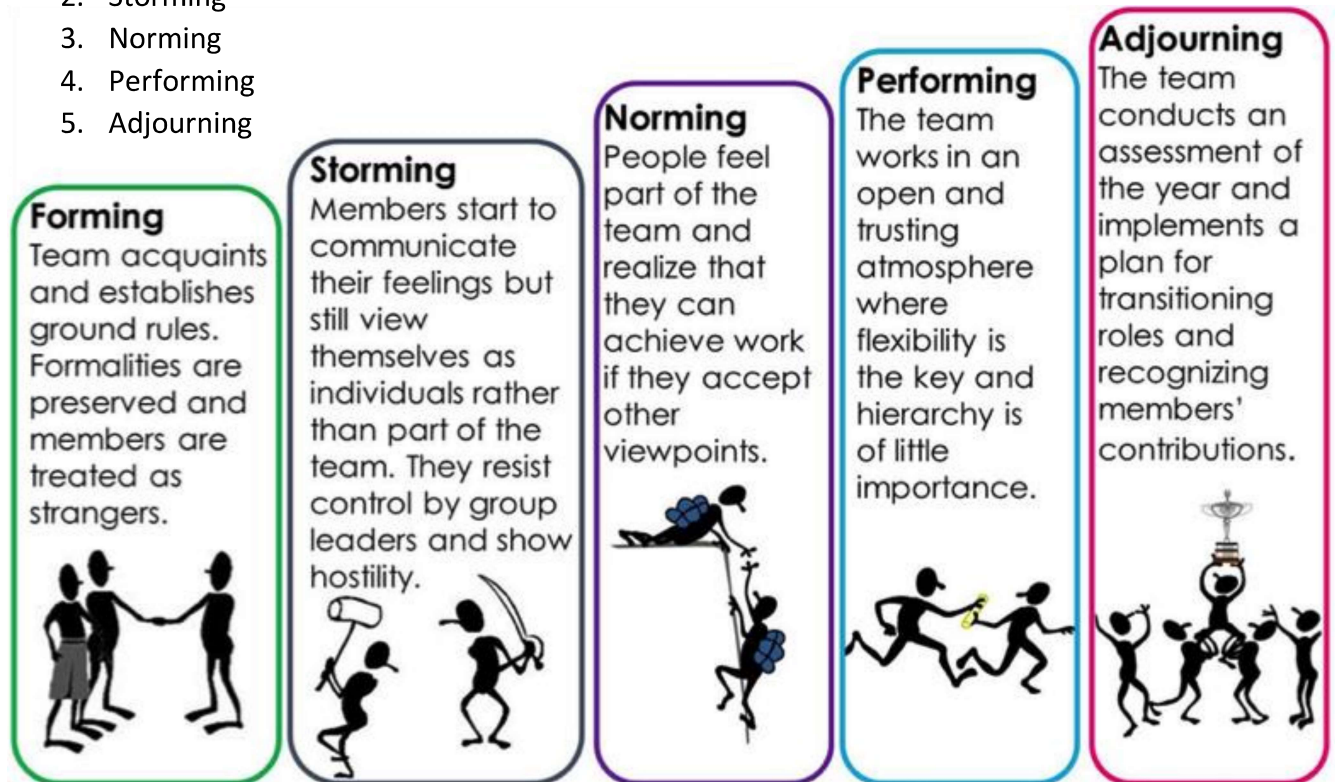
Team Building

Types of team members:

- a. Leader- encourages consensus, open communication
- b. Doer- enjoys providing the team with good technical data, info
- c. Thinkers- often has little to say
- d. Carers- alert to relationship issues within in the team

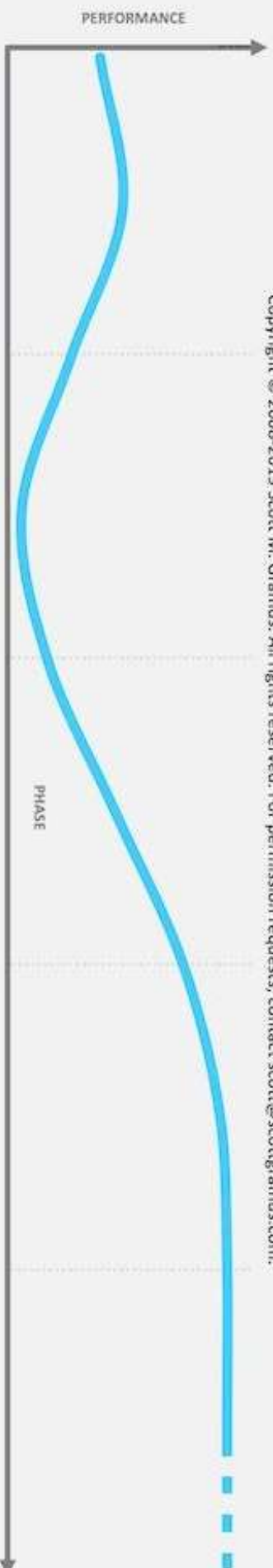
Phases that teams go through:

1. Forming
2. Storming
3. Norming
4. Performing
5. Adjourning



Phases of Team Development

Forming, Storming, Norming, and Adjourning — based on group development model by Bruce Tuckman
 All phases are necessary and inevitable for a team to grow, tackle problems, find solutions, plan work, and deliver results
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CHARACTERISTICS	FORMING	STORMING	NORMING	PERFORMING	ADJOURNING
CHARACTERISTICS	<ul style="list-style-type: none"> • Questioning • Socializing • Displaying eagerness • Focusing on group identity & purpose • Sticking to safe topics 	<ul style="list-style-type: none"> • Resistance • Lack of participation • Conflict • Competition • High emotions • Starting to move towards group norms 	<ul style="list-style-type: none"> • Reconciliation • Relief, lowered anxiety • Members are engaged & supportive • Developing cohesion 	<ul style="list-style-type: none"> • Demonstrations of interdependence • Healthy system • Ability to effectively produce as a team • Balance of task and process orientation 	<ul style="list-style-type: none"> • Shift to process orientation • Sadness • Recognition of team and individual efforts
STRATEGIES	<ul style="list-style-type: none"> • Taking the 'lead' • Providing clear expectations and consistent instructions • Quick response times 	<ul style="list-style-type: none"> • Normalizing matters • Encouraging leadership 	<ul style="list-style-type: none"> • Recognizing individual and group efforts • Providing learning opportunities and feedback • Monitoring the 'energy' of the group 	<ul style="list-style-type: none"> • Celebrating • 'Guide from the side' (minimal intervention) • Encouraging group decision-making and problem-solving • Providing opportunities to share learning across teams 	<ul style="list-style-type: none"> • Recognizing change • Providing an opportunity for summative team evaluations • Providing an opportunity for acknowledgments