

RED–YELLOW–GREEN Team Check-In Worksheet

Purpose:

This check-in supports teams working in community-focused and nonprofit environments by creating shared awareness of capacity, well-being, and support needs. It centers empathy, sustainability, and mutual care while honoring boundaries. Sharing details is **optional**; the goal is collective understanding, realistic expectations, and appropriate support.

How to Use This as a Team

- Each team member completes this worksheet at the start of a meeting, circle, or weekly check-in.
 - Alternatively, leaders can facilitate this verbally. However, if there is something really bothering team members, they may not feel as comfortable addressing it verbally with others.
- Choose **one color** for *Work/Professional* and **one color** for *Personal*.
- You may add notes if you want—but you are never required to share personal details.
- Facilitators, supervisors, and teammates use this information to:
 - Adjust priorities and timelines
 - Share workload equitably
 - Offer mutual aid, flexibility, or emotional support
 - Prevent burnout and promote sustainability
- This tool is especially useful in high-care, high-impact work where capacity can change quickly.

Team Agreements:

- We respect privacy—no one is required to explain their color choice.
- Colors are **not** a performance evaluation or measure of commitment.
- This tool supports sustainability, not productivity at all costs.
- We recognize that community and nonprofit work often involves emotional labor.
- The purpose is trust, care, and realistic expectations so we can continue showing up for the communities we serve.

Team Member Information

Name: _____

Date: _____

Meeting / Week: _____

1. Professional / Work Check-In

Select the color that best represents your current work capacity:

 RED – At Capacity / Overloaded

- I am at full capacity and feeling overwhelmed or behind.
- Additional tasks would be difficult right now.
- Support, flexibility, or help prioritizing would be beneficial.

 YELLOW – Managing but Stretched

- I am balancing my workload reasonably well.
- I can maintain current responsibilities.
- Taking on additional tasks may be challenging at this time.

 GREEN – Doing Well / Available

- I feel caught up and on track.
- My workload feels manageable.
- I could potentially take on additional tasks or support others.

Optional Work Notes (priorities, deadlines, support needed):

Designed by: Creating Community in Real Life – Tracy McIntyre.

Credit to the Montana State University Extension Services for original idea and concept.

2. Personal Check-In

Select the color that best represents your personal well-being today:

- RED – High Emotional Load**
 - Something personal is demanding my attention or emotional energy.
 - I may be more distracted, sensitive, or low on bandwidth.
 - Details are not required—awareness helps my team respond with understanding.

- YELLOW – Mildly Drained**
 - Something is on my mind or affecting my energy.
 - It’s manageable, but it may slightly impact focus or stamina.
 - Examples might include poor sleep, appointments, or minor stressors.

- GREEN – Feeling Good**
 - I am rested, emotionally steady, and doing well overall.
 - I feel positive and ready to engage.

Optional Personal Notes (share only if comfortable):

Mark this box if you are sharing to make your manager aware of the situation but would like for it to remain confidential at this time.

Team Awareness & Support (Optional – For Managers or Facilitators)

- Any immediate adjustments needed? Yes No

- Support offered or planned:
