*Forming the Team:*

*Picking the Right Team Members*

Making the Most of Diversity - Task-Related Skills & People Skills

Use this list of task- and people-related strengths to determine what mix of knowledge and skills your team requires.

Work Skills Chart

|  |  |
| --- | --- |
| **TASK-RELATED SKILLS: To complete the tasks at hand, you may need members who bring:** | **PEOPLE SKILLS: To get everyone working well together, enlist members who excel at:** |
| * Relevant functional expertise (for example, in fundraising, planning, project management, outreach, marketing) * Relevant knowledge (for example, in direct service, case management, environmental advocacy, specific population) * Technological skill * An appetite for research * The ability to mine and analyze data * A knack for writing and presenting | * Networking with people outside the team who can provide resources * Facilitating meetings * Building consensus * Giving feedback * Communicating in groups * Resolving conflicts * Negotiating * Motivating others * Exercising emotional intelligence * Influencing others |

Work Style Continuum Chart - have a mix of approaches

|  |  |  |
| --- | --- | --- |
|  | | |
| Is detail-oriented | **OUTLOOK** | Focuses on the big picture |
| Focuses on the next project deadline | Looks one to three years down the road |
| Decides on the basis of data | **DECISION MAKING** | Relies on intuition |
| Decides deliberately with analyses and contemplation | Decides spontaneously |
| Is a late adopter of trends; prefers certainty and clarity | **CHANGE** | Is an early adopter; is comfortable with uncertainty |
| Prefers incremental change; builds on what works | Prefers large, sweeping change; likes a “clean slate” |
| Places task completion ahead of relationships | **PRIORITIES** | Places relationships and harmony ahead of tasks |
| Focuses on the tasks themselves | Focuses on how the work gets done (the process) |
| Prefers to work alone  Prefers a slow and methodical environment | **WORK ENVIRONMENT** | Prefers to work in groups  Prefers a fast and fluid environment |
| Works on one task at a time | Multitasks |
| Spends time analyzing and preparing for risk | **RISK** | Faces risk with minimal planning |
| Identifies all possible outcomes and generates contingencies ahead of time | Prefers to make real-time adjustments as needed |

Team Member Roles Chart

|  |  |
| --- | --- |
| **Task roles** | **Process roles** |
| **Meeting facilitator:** puts the agenda together, leads the discussion, and makes sure the meeting starts and ends on time  **Project manager:** sets up the project sequence and timeline; holds members accountable to that plan  **Task specialist:** organizes and leads a portion of the larger project, such as conducting the research or doing the analysis  **Note taker:** records all key decisions; documents the progress of the team  **Liaison:** informs stakeholders (clients, boss, customers) about team activities; brings their ideas and concerns back to the group | **Gatekeeper:** pays attention to who  is and isn’t talking; invites quiet members into the conversation  **Mediator:** names conflicts (often the “elephant in the room”) and then guides conflict resolution  **Devil’s advocate:** challenges the team’s thinking to increase rigor in decision making  **Morale manager:** keeps members energized by remembering birthdays, organizing social events, and so on  **Consensus taker:** monitors the commitment level during team discussions to see if people really agree with decisions  **Goal/rule keeper:** monitors adherence to team goals and rules; facilitates ongoing “continuous improvement” discussions |

Team Player Styles Chart\*

|  |  |  |
| --- | --- | --- |
| Contributor | Task- oriented | Does their homework; likes data. Dependable, responsible, authoritative, organized. |
| Collaborator | Goal-directed | Views mission and vision as paramount, but is flexible and open to new ideas. Accommodating, flexible. |
| Communicator | Process- oriented | Effective listener and facilitator of involvement, conflict resolution, consensus building, feedback. People person and at times not sufficiently focused on task completion. |
| Challenger | Questioner | Willing to disagree with others, goals, methods, and even the ethics of the team. Outspoken, principled, ethical, adventurous. Often undervalued. |

\*Source: Glenn M. Parker

**EXERCISE:**

**DEFINING TEAM MEMBER ROLES AND STYLES**

1. Review the Team Member Roles Chart. Circle the Task and Process Roles that apply to you best. Now highlight your weaker areas.
2. Review the Team Player Styles Chart. Circle the Styles and descriptions that apply to you best.
3. For a new team, or an existing team you’d like to reevaluate:
4. Team:
5. Using the Team Member Roles Chart, identify people who will do or are doing a good job performing the Task and Process Roles. (people often have multiple roles, of course)
6. Have we clearly defined Roles for team members? Are roles fuzzy, causing confusion or conflict?
7. What Roles are we missing?
8. Who can perform the missing roles? List here.

Name Roles\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Set the expectation that everyone needs to trust others in performing their respective roles. If they want to change roles, they need to ask.

Process Goals: Defining Expectations - SAMPLE

|  |  |
| --- | --- |
| **Regarding:** | **Team members are expected to:** |
| Task work | * meet deadlines * keep everyone informed on progress * meet targets |
| Relationships | * manage their own emotional responses * maintain good working relationships * resolve conflicts |
| Collaboration | * pull their weight [define] * accept and support team decisions |
| Meetings | * attend all required meetings * come prepared * actively participate |
| Time management | * give advance notice before pushing back a due date * return all related e-mails, texts, and calls by close of business each day |

Rules of Conduct – Inventory Chart

|  |  |  |
| --- | --- | --- |
| **RESPECT AND TRUST** | Do Now | Add |
| Keep conversations confidential. |  |  |
| Be punctual. |  |  |
| Return phone calls and e-mails by close of business each day. |  |  |
| Avoid sarcasm, snide remarks, or melodramatic body language (such as eye rolling) when conveying disagreement. |  |  |
| Don’t sulk or give the silent treatment when your position has not prevailed. |  |  |
| Respect other people’s ways of accomplishing tasks; don’t redo work or impose your way on others. |  |  |
| Be flexible. |  |  |
| Listen without interpreting people’s motives. Ask why they said, did, or asked for something. |  |  |
| Volunteer to take on work when you can without doing the “who’s doing more/less” calculation. |  |  |
| Other: |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **MEETING DISCUSSIONS/ DECISION-MAKING** | | Do Now | Add |
| Goal: make it easy to contribute – every member feels comfortable advocating, challenging, proposing alternatives, before getting behind final decision | |  |  |
| Share “airtime,” listen, and don’t interrupt others. | |  |  |
| Invite quiet people to speak. | |  |  |
| Resist viewing an opposing opinion as a personal affront. | |  |  |
| Be willing to change your position or compromise. | |  |  |
| Support the team’s final decision, even when it’s different from the one you proposed. | |  |  |
| Stop advocating your position after a decision has been made. | |  |  |
| Be clear on Decision-Making Process – 1) leader decides after input; 2) majority vote; 3) consensus. | |  |  |
| Other: | |  |  |
| **DISSENT AND INNOVATION** | Do now | Add |
| Rigorously examine multiple options, and their respective strengths and weaknesses, before evaluating alternatives and making decisions. |  |  |
| Assign a devil’s advocate at each meeting to assure different perspectives are considered and normalized. |  |  |
| Protect dissenting views by encouraging the speaker to explain and preventing others from immediately dismissing the ideas. |  |  |
| Encourage innovation by delaying evaluation. |  |  |
| Reframe “This will never work” as “How could we make it work?” |  |  |
| Other: |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **FEEDBACK AND REPORTING** | Do now | Add | |
| Give the team status updates according to the prescribed process (which the team determines). |  |  | |
| Give a “heads-up” and be responsible for the consequences if you have to miss a deadline. |  |  | |
| Give positive feedback frequently; speak up when someone’s behavior helps the team. |  |  | |
| Give negative feedback constructively. State the observed behavior and its impact on the team, ask for the other person’s perceptions, and suggest a preferred behavior. |  |  | |
| Admit your own mistakes. |  |  | |
| Listen and avoid defensiveness when receiving constructive feedback. |  |  | |
| When giving or receiving feedback, put it in the context of helping the team move toward its goals. |  |  | |
| Other: |  |  | |
| **CONFLICT RESOLUTION** | |  |  |
| Assume that every team member is working in good faith toward the team’s goals. | |  |  |
| Put conflict “on the table” for discussion. | |  |  |
| Discuss conflict with the goal of identifying what is best for the team’s future. | |  |  |
| Commit: Discuss the conflict first with the person involved; avoid talking behind anyone’s back. | |  |  |
| Don’t yell, use profanity, make threats, or walk out of discussions. | |  |  |
| Other: | |  |  |

Team Contract - SAMPLE

Here’s a template for capturing the goals, roles, rules, and metrics your team has agreed to. Update your contract periodically, as members, tasks, and timelines change.

***Brief team description:***

***Date:***

***Team members:***

|  |  |  |
| --- | --- | --- |
| Name | Contact information | Signature |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

***Goals that will serve as a unifying force in the work ahead:***

|  |
| --- |
| Task goals (what we’ll accomplish) |
|  |
| Process goals (how we’ll work together) |
|  |

***Roles we’ve identified to ensure performance:***

|  |  |
| --- | --- |
| Roles | Names |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

***Rules of Conduct:***

|  |  |
| --- | --- |
| Meetings |  |
| Communication |  |
| Decision making |  |
| Managing tasks |  |
| Managing relationships |  |

***Evaluation plan (how we’ll determine that we’ve achieved our goals):***

A Tool to Improve Team Process:

If things are going south, have everyone fill in this form, then debrief on the results together.

**PROCESS RATINGS EXERCISE**

Ask members to score the team on the following elements of teamwork,

and then meet to discuss. Have them share their ratings, explain their

reasoning, and suggest changes that would improve the ratings.

**1**

**. Team infrastructure (goals, roles, and rules)**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

**. Accountability**

**2**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

**3**

**. Workload**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

Never clearly

established;

members don’t

know what’s

expected of them.

Members don’t

comply with team

goals and rules;

they aren’t held

accountable.

Clearly established;

members know

what’s expected of

them.

Members comply

with goals and

rules; they’re held

accountable.

Team has “free

riders” who don’t

contribute or

volunteer; their

work gets ignored

or is done by a

dominant few.

Team has no “free

riders”; work is fairly

distributed.

**4**

**. Problem solving and decision making**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

**. Managing conflict**

**5**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

**6**

**. Task/project progression**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**10**

**9**

**. Communication**

**7**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**10**

**9**

**. Trust**

**8**

**1**

**2**

**3**

**4**

**5**

**6**

**7**

**8**

**9**

**10**

A few members

make all the

decisions, with little

or no rigor; the team

doesn’t appreciate

opposing ideas.

Members avoid

conflict or pretend

it doesn’t exist;

people complain

about others behind

their backs.

Members do poor-

quality work and

miss deadlines.

Members don’t

communicate; they fail

to disclose decisions,

rationales, goals, and

other information

critical to performance.

Members don’t trust

one another, which

stifles innovation, risk

taking, and rigorous

decision making; they

expect their input to

be misinterpreted

or leaked to people

outside the team.

Team discusses

decisions rigorously,

seeks diverse ideas,

invites dissent, and

includes affected

stakeholders.

Members explicitly

discuss conflicts

with all those

involved.

Members produce

high-quality work

on time.

Members communicate

frequently and fluidly;

they fully disclose

decisions, rationales,

goals, and other

information critical to

performance.

Members have a high

degree of trust, which

fosters innovation, risk

taking, and rigorous

decision making; they

expect their input to

be received openly and

kept confidential.