



Technical Note #2

Building a team

New York State Education Department
Workplace Education Project

1994-97

December 1994 edition

CONTENTS

Background	1
Who should be on the team?	2
What criteria do you use to select members?	2
How do you get them interested and negotiate their roles?...	3
What do you do with them in your first meeting?	3
How do you make sure that all members can participate in a meaningful, productive way?	4
Who will serve as leader?	5

Background

Technical Note #1 ("Collaborative Learning for Continuous Improvement: An Introduction") introduced the thinking and procedures central to a "collaborative" or "team" approach to workplace education. That Tech Note also presented a cycle of program components which you and other stakeholders would oversee through the life of a workplace education effort.

On that cycle, one of the first things you would have to do is to pull together an education planning team. But who should be on that team? What criteria do you use to select members? How do you get them interested and negotiate their roles? What do you do with them in your first meeting? How do you make sure that all members are able to participate in a meaningful, productive way? And who will serve as leader of all this activity?

This Tech Note provides some answers to those questions. For further ideas, see the following publications:

Sperazi, L. and Jurmo, P. (1994) Team Evaluation: A Guide for Workplace Education Programs. East Brunswick, NJ: Literacy Partnerships.

Folinsbee, S. and Jurmo, P. Collaborative Needs Assessment: A Handbook for Workplace Development Planners. Toronto: ABC CANADA.

Who should be on the team?

An education planning team (EPT) should have a mix of the stakeholder groups who will have an interest in the workplace education effort. (We define "stakeholder" as an individual or institution which is investing something [time, money, or other resources] in the education effort and will expect something in return. Note that, in current organizational development parlance, a "stakeholder" might also be termed a "customer" of the education effort.)

Stakeholders might include workers (both program participants and other workers), union representatives, higher-level managers (production and human resource/training managers), supervisors, and education providers.

What criteria do you use to select members?

For a team to succeed, members need to meet the following criteria:

Interest (motivation) Members need to see a value in the education effort and want it to succeed. They need to see the EPT as a means of ensuring a successful education effort.

Time Members need to have a reasonable amount of time to give to the real work of the team. Without it, work doesn't get done -- or is done by only a few members -- and the team isn't really a team.

Expertise While members don't have to be trained as "team leaders" per se, they do need certain kinds of knowledge and skills. For example, they need to know something about the workplace itself and the workforce. They need to be able to perform such functions as brainstorming, recording ideas, and organizing information. While some of these skills can be developed through special training, the work of the team will be speeded up if members already have at least a basic level of these skills when they join the team.

A mix of workplace roles and backgrounds As noted under "Who should be on the team?" above, members should

represent a range of workplace roles (jobs). They should also be a representative mix of ethnic and linguistic groups, genders, ages, and abilities.

How do you get them interested and negotiate their roles?

If you are an "outsider" (an education provider who will be coordinating the team's efforts), you will likely have to rely on a few "inside" key contacts to help you identify potential members for the team. Go over the above criteria with your key contacts and identify some likely candidates.

Meet with those "candidates" and explain that you are looking for people who have the time and interest in organizing and overseeing a workplace education effort. Explain the steps that the team will go through (See Technical Note #1's review of the program components an EPT would oversee.) Make it clear that members need to put some time into the team, but that the exact responsibilities of members are flexible. It will be up to the team to decide who does what.

What do you do with them in your first meeting?

When you get members together in your first meeting, you might briefly summarize for them what you had told them individually. Better yet, ask members to tell you what they anticipate the team will be about, based on the discussions they already had with you. Ask them the following questions:

- At this initial stage, what do you think the purpose of the education planning team is?
- What do you understand the duties of members will be?
- What questions do you have about the team at this point?

Then present members with your own thoughts on these questions.

You might then go into some more depth about the "team concept" which you hope will underlie your efforts. Rather than lecture them about the history and meaning of teams, first get them to think about their own experience on teams, in groups, etc. This

will give everyone a clearer picture of "where people are coming from" and elicit questions they might have about working in a team. To do so, ask them these kinds of questions:

1. What does "team" mean to you -- what have your experiences been working with teams?
2. What are some advantages and disadvantages of working in a team or group?
3. What is required to make a team work well?
4. How is the idea of "teamwork" now being used in this workplace?
5. How do you think the notion of "team" might be applied in a workplace education project?

Note the participants' responses. This will serve as a record of the early thinking of team members.

How do you make sure that all members can participate in a meaningful, productive way?

The fact that someone joins a team doesn't necessarily mean that he or she will automatically feel comfortable and be able to be an active participant. Ideally, all members will be able to have a high degree of responsibility, control, and reward vis-a-vis the group's activities.

Some members, however, might lack some of the skills or the self-confidence needed to participate in a team. In some cases, there might be a history in the organization of some groups of employees not being "empowered" to do the kinds of things you want them now to do: speak up, take risks, make decisions.

You need to -- in a diplomatic way -- make it clear that all members should be encouraged to participate actively. Make it clear that they can talk with you privately if they feel inhibited from participating actively -- for any reason.

You also have to be sensitive to group dynamics and structure discussions so that all members get an opportunity to speak. In multilingual workplaces, you might need an interpreter or have language minority groups form smaller groups in which they can speak freely in their own tongues. You might have to limit the

amount of reading and writing tasks for members who don't feel comfortable with print. Members might take turns preparing presentations or serving as recorder, so that all get a chance to play a variety of roles.

In addition to structuring day-to-day team activities in ways to nurture full member participation, you might also organize special events to instill a team identity and open communications. You might, for example, arrange an informal lunch, picnic, or evening at the ball game. Perhaps the company has an annual volleyball tournament and your team could participate. You might, if resources permit, go to a special "team training" workshop or retreat.

Just be sensitive to the fact that you will likely have to continually nurture a team identity and "infrastructure" to enable members to participate fully. Don't expect members to automatically begin operating as a cohesive unit just because you've gotten them to sit down together and call themselves a "team."

Who will serve as leader?

The role of leader -- or "facilitator" or "coordinator" -- of an education planning team is a vital one. This is the person who must do most of the "grunt" work of organizing meetings, keeping track of records, writing reports.

In fact, the team might divide this work among several different people. The more the work of the team is shared, the more likely it is that members will take ownership for the group. This will also reduce the likelihood that one person will burn out from overwork.

The leader(s) of the team must have all of the characteristics described above under "What criteria do you use to select members?" Leaders must also have qualities like patience, perseverance, an understanding of democratic principles and procedures, willingness to listen and encourage good ideas, ability to communicate clearly, and ability to balance the many interests represented in the group. Bookstores are full of "how to be a good leader" guides. You might read a few of them.

Keep in mind that, for an education planning team to work, good leaders are vital. Whoever takes on that role should think carefully about the responsibilities entailed and prepare carefully to fulfill them.