Module 6: Understanding Team Roles

Preparation

Review Reference Manual

Equipment, Materials, Supplies

❑   Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

❑   Review *Exercise 6-1: Team Role Analysis*

  ❑   Prepare newsprint to demonstrate how to score each page.

Room Arrangements

Participants should be seated at tables with enough room to work individually.

Overview

Purpose

The purpose of this module is to develop participants' ability to identify formal, or assigned, roles in a team, and to encourage a team to have members adopt support roles suited to their personalities.

Objectives

At the end of this module participants will be able to:

•   Discuss individual roles within a team: team leader, team member, timekeeper, recorder, and coach as facilitator and trainer.
•   Identify team support roles and the contributions each makes to a team.

Content	Time
Introduction	5 minutes
Individual Team Roles	10 minutes
Team Support Roles	45 minutes
	Total Time: 60 minutes

Time/Materials	Content/Activities

Introduction

5 minutes

OV 6-1

Introduce this session by presenting the purpose, objectives, and overview of the content.

Purpose

TELL participants The purpose of this module is to develop participants' ability to identify formal, or assigned, roles in a team, and to encourage a team to have members adopt support roles suited to their personalities..

Objectives

OV 6-2

PREVIEW the objectives from the reference manual.

Overview

OV 6-3

PREVIEW module contents

TELL participants that in this session we will review formal individual team roles (assignments) and discuss team support roles (personal behaviors).

Individual Team Roles

10 minutes

OV 6-4

(you may want slides from Module 1 about the roles, and Module 2 about the coach-team leader relationship)

REVIEW the formal roles and responsibilities of team members and ask participants if they have any questions or concerns.

REVIEW the relationship between the coach and team leader and ask participants if they have any questions or concerns.

Team Support Roles

45 minutes

Exercise 6-1: Team Role Analysis

Newsprint to demonstrate

DISCUSS the fact that people act according to their personalities, and understanding how different personalities support team goals will help a coach to encourage a team to develop a variety of support roles.

Team Role Analysis Questionnaire

INTRODUCE the activity

- **TELL** participants the purpose of this activity is to learn about the various team support roles team members may take and to appreciate the contributions each member makes to the team.

demonstrate scoring	• **TELL** participants another purpose is to find out how each person expresses his / her personality on a current team.
	• **TELL** participants to turn to *Exercise 6-1: Team Role Analysis*
	• **DEMONSTRATE** how to fill in the scoring sheet for each trait.

CONDUCT the activity

• **FOLLOW** the exercise directions. **HELP** participants correctly total and enter scores.

SUMMARIZE the activity

OV 6-5 through 6-9	• **TELL** participants to read the description of their top scores
	• **ASK** if they agree with this finding
	• **EXPLAIN** that a member can assume a role that is NOT his/her top score, if he/she is aware of the need to do so and able to modify their behavior. This is easiest with roles that are second or third highest in score, especially when the scores are close together.
	• **EXPLAIN** that a team needs to have representatives from all these roles to help the team develop, and a team that knows that roles its members have may see a "missing" role. In that case, someone with that role as a second or third score could take it on.
	• **DESCRIBE** that in prior uses of this scale, we have found teams that lack process managers don't have efficient meetings; that teams that have many harmonizers don't use critical thinking and accept the opinion of the leader as truth; that some teams of health care workers have many harmonizers and technical experts, but few output drivers or politicians (might this explain why health care workers sometimes don't accomplish tasks, or are not very persuasive?)
	• **ASK** if they are willing to share their results – consider posting a summary sheet to see what the characteristics of the group are, ask them what they need to do to balance the roles.
	• **TELL** participants that they may wish to use this exercise with the teams they are working with.
	• **IF THESE TEAMS ARE GOING TO STAY TOGETHER TO DO QA WORK, ASK THEM WHAT THE IMPLICATIONS OF THESE RESULTS ARE FOR FUTURE WORK**. (Perhaps they have well balanced roles, perhaps not – they may need to encourage some members to "put on" alternative behaviors).
Transition	REVIEW module goals and link them to the next module.

Exercise 6-1: Team Role Analysis Questionnaire

Instructions

The questionnaire has five sections, each of which focuses on a different team behavior. Each section is allocated ten points and you will allocate the ten points among the statements in that section. Think of a team in which you are currently a member. The number of points that you assign to each statement should reflect your perception of your behavior at the present time. The more strongly that you believe you demonstrate a particular behavior, the more points you should allocate to that item. Be sure to allocate ten points only to each section, no more and no less.

Section One: Decision Making

When a decision is being made in my team, I…

Points	
	1. State my opinion as a specialist in my own discipline.
	2. Explore the full implications of all ideas suggested.
	3. Take an independent viewpoint by considering every aspect.
	4. Evaluate the impact of possible decisions on other groups.
	5. Persuade the team to accept my point of view.
	6. Foster an open atmosphere so that people can say what they really think.
	7. Offer radical suggestions that no one else has considered.
	8. Structure the discussion so that each member understands their options.
	9. Make sure that the team adheres to a strict timetable for decision making.
	10. Help the other team members to clarify their views.

Total points must equal 10

Section Two: Creativity

In a team brainstorming or creativity session, I…

Points		
	11.	Can be relied on to come up with unexpected ideas.
	12.	Stand back and comment on what others say.
	13.	Quickly choose the best idea and encourage others to adopt my viewpoint.
	14.	Contribute to the session if I believe that I can add something of value.
	15.	Organize the team so that the brainstorming process is executed properly.
	16.	Build on the ideas of others.
	17.	Contribute ideas that are relevant to my professional or technical training.
	18.	Create the right climate for a productive, creative session.
	19.	Bring in ideas from outside the team.
	20.	Make sure that the team maintains a strict schedule so that the session is productive.

Total points must equal 10

Section Three: Planning

When the team is planning what needs to done, I…

Points		
	21.	Assign actions and priorities to others.
	22.	Consider the possible implications of our plans on other teams.
	23.	Make sure that effective planning methods are used.
	24.	Pull together proposals and develop comprehensive plans.
	25.	Contribute ideas pertaining to those subjects in which I have expertise.
	26.	Make sure that a clear timetable for action is developed.
	27.	Help to motivate my team members.
	28.	Assist the team in whatever ways seem helpful.
	29.	Consider each aspect of the plan to ensure that is realistic.
	30.	Invent unexpected ways to use resources.

Total points must equal 10

Section Four: Team Effectiveness

When the team is reviewing its effectiveness, I…

Points	
	31. Make sure that the views of each team member are considered.
	32. Present my opinions and ideas when they would be helpful.
	33. Get the opinions of people outside the team.
	34. Question the fundamental team's effectiveness of the team and suggest radical changes.
	35. Summarize every viewpoint and evaluate the team's overall strengths and weaknesses.
	36. Contribute as a functional specialist.
	37. Record all of the useful points and establish a timetable for improvement.
	38. Take an impartial attitude in order to evaluate the team objectively.
	39. Decide what needs to be done and convince others to accept my views.
	40. Stimulate open communication among team members.

Total points must equal 10.

Section Five: Valuing Contributions

Others value my work in teams because I…

Points		
	41.	Work hard to create a positive climate.
	42.	Think of innovative ideas.
	43.	Am flexible.
	44.	Contribute specialized knowledge and expertise.
	45.	Make sure that thing get done.
	46.	Build positive links with other teams.
	47.	Bring structure to team meetings.
	48.	Provide leadership.
	49.	Build on other people's ideas.
	50.	Provide an impartial assessment of the team's activities.

Total points must equal 10.

Team Roles Analysis
Questionnaire Scoring Sheet

Instructions

Transfer your scores from the questionnaire items to the appropriate boxes below. Then add the items in each horizontal row of scores and record your total in blank box provided.

Item Number					Your Totals	Team Roles
8	15	23	31	47		Process Manager
2	16	24	35	49		Concept Developer
7	11	30	34	42		Radical
6	18	27	40	41		Harmonizer
1	17	25	36	44		Technical Expert
9	20	26	37	45		Output Driver
3	12	29	38	50		Critic
10	14	28	32	43		Cooperator
5	13	21	39	48		Politician
4	19	22	33	46		Promoter

Team Roles Analysis
Questionnaire Interpretation Sheet

Process Manager

Process management comprises a set of skills that should be acquired by all leaders of teams. The process manager channels human resources to get things done. He or she forms teams, identifies team members' strengths, clarifies objectives, structures meetings, explores issues, allocates roles, and maintains momentum. The process manager brings structure to the team and ensures that goals are set. He or she has the skills of a good chairperson, control, self-confidence, calmness, and the ability to communicate well with others.

Key contribution: Ability to chair meetings

Concept Developer

The concept developer ensures that ideas are developed and evaluated. This person helps to identify possibilities and transform them into practical proposals. The concept developer has the ability to see the potential merits and drawbacks of ideas. When someone suggests an idea, the concept developer is creative and excels in envisioning, imagining, thinking logically, and understanding.

Key contribution: Vision

Radical

The radical presents new ideas by considering problems and opportunities from unexplored angles. This person sees new possibilities, adopts unconventional approaches, has insights, and produces novel proposals. The radical often is strongly intuitive. Radicals look at situations with a fresh perspective, prefer to think things through independently, and refuse to accept "conventional wisdom." The radical is a free spirit.

Key contribution: Conceptualizing

Harmonizer

The harmonizer builds team morale by energizing, supporting, and encouraging others and by resolving interpersonal conflicts. The harmonizer believes that team efficiency is based on positive interpersonal relationships. He or she encourages commitment and cooperation and, thereby, good performance. The predominant impression that others have of the harmonizer is that he or she is a caring person. The harmonizer tries to ensure that team members value one another and gain something significant from their membership in the team.

Key contribution: Supporting

Technical Expert

The technical expert is a subject matter specialist. The technical expert contributes an expert or professional viewpoint to the team, making the team the beneficiary of his or her extensive training and experience in a particular area.

Key contribution: Specialized know-how

Output Driver

The output driver makes sure that tasks are completed. He or she sets time limits and targets and follows through on assignments. The output driver pushes to get things done and maintains standards. He or she checks to see whether things could go wrong at the last minute and is a creative tactician and planner.

Key contribution: Pushing

Critic

The team member who takes the role of the critic must be intellectually capable, temperamentally inclined, and appropriately skilled. The critic takes a mental step back from the team to judge, to consider possibilities to look for possible pitfalls, to sound notes of caution, and to question and challenge ideas. He or she confronts the team with objective observations and carefully weighted opinions. The critic's commentary should be objective, not negative or positive.

Key contribution: Impartial evaluation

Cooperator

The cooperator is an industrious team member who assists in whatever way is needed by working hard and by being adaptable. The cooperator is sensitive to other's needs and is willing to tackle unpleasant jobs without complaint. To succeed as a cooperator, a person must have well developed observation skills, a sense of altruism, enthusiasm, and a variety of capabilities. The cooperator's key contribution to the team is flexibility.

Key contribution: Flexibility

Politician

Because politicians believe that they know the right thing to do, they try influence other people to support their opinions. They mold the team views, build alliances, and guide others. Politicians are results orientated , influential, power conscious, and persuasive. Such people are dogged and resolute; they bounce back after setbacks. The role of politician has been described as that of a "shaper," as the politician shapes opinions and objectives.

Key contribution: Drive

Promoter

The promoter is an extrovert with a set of appropriate skills. The promoter gathers useful contacts and makes connections outside the team. He or she is open minded, socially skilled, and cooperative. This person links the team to others with his or her outgoing and sociable nature and ability to build relationships, to investigate resources and to check out ideas and possibilities. Promoters are "fixers" who enable things to get done.

Key contribution: Linking

Module 7: Establishing Positive Team Climate

Preparation

Review Reference Manual

Equipment, Materials, Supplies

❑ Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

❑ Review *Exercise 7-1: Group Discussion – Conditions Supporting Positive Team Climate*

❑ Review *Exercise 7-2: Assessment of Team Climate.*

Room Arrangements

Participants should be seated at tables in groups of 4 to 6 people so that group members face each other.

Overview

Purpose

The purpose of this module is to develop participants' ability to promote a positive team climate.

Objectives

At the end of this module participants will be able to:

- Identify techniques that will promote a positive team climate.
- Ask questions to assess a team's climate.

Content	Time
Introduction	5 minutes
Creating Positive Team Climate	15 minutes
Assessment of Team Climate	10 minutes
	Total time: 30 minutes

Time/Materials	**Content/Activities**

Introduction

DISCUSS the purpose, objectives, and overview of the content.

5 Minutes

    Purpose

OV 7-1

TELL participants that the purpose of this module is to develop participants' ability to promote a positive team climate.

    Objectives

OV 7-2

PREVIEW the objectives from the reference manual.

    Overview

OV 7-3

PREVIEW module content.

TELL participants they will engage in small group discussions about ways to promote a positive team climate, and review a list of questions that will help them assess a team's climate.

Creating a Positive Team Climate

DISCUSS the definition of team climate (from reference manual).

DISCUSS that ground rules can express the team's desired behaviors, and influence the team's climate

15 minutes

OV 7-4

OV 7-5 through 7-14

EXPLAIN the conditions necessary for positive team climate (from the reference manual).

- Trust
- Openness
- Closeness
- High energy

Exercise 7-1 Group Discussion – Conditions Supporting Positive Team Climate

Exercise 7-1: Group Discussion – Conditions Supporting Positive Team Climate

INTRODUCE the exercise

- **REVIEW** the *Guide for Leading a Group Discussion*
- **FORM** 4 groups of 4 – 6 people
- **ASSIGN** one of the conditions – trust. openness, closeness, high energy – to each group
- **TELL** participants their assignment is to discuss how to

promote their assigned condition (trust, openness, etc.) in group work.
- **DIRECT** teams to choose a team leader, recorder, timekeeper and coach
- **TELL** teams the discussion can be led by the team leader, the coach, or any member of the team. The Group Discussion Guidelines are written as points for the discussion leader.
- **TELL** participants they will have 5 minutes for this exercise, and the recorder will present a summary of their discussion

CONDUCT the exercise.

- **WATCH** the group discussions, guiding groups as needed
- **STOP** groups after 5 minutes
- **ASK** the recorder of each group to present their group's ideas

SUMMARIZE the exercise.

- **EMPHASIZE** any things groups missed about how to promote a positive team climate
- **POINT OUT** the main steps in holding a group discussion – state the topic, foster the discussion using various interventions illustrated in the Guide, conclude the discussion.

Assessment of Team Climate

10 minutes

OV 7-15

Exercise 7-2: Assessment of Team Climate

INTRODUCE the exercise

- **TELL** participants to turn *to Exercise 7.2: Assessment of Team Climate.*

CONDUCT the exercise

- Tell participants to read the questions.
- Ask participants what behaviors they would expect to see to allow them to answer "yes" to the questions

SUMMARIZE the exercise

- **ADD** items from the reference manual describing positive climate that were not mentioned
- **ASK** participants how they think they may use this list of questions.

Transition

REVIEW the module objectives and link them to the next module.

Exercise 7-1: Group Discussion – Conditions Supporting Positive Team Climate

Guide for Leading a Group Discussion

Preparation

Arrange seating to encourage group interaction (e.g., tables and chairs set up in a "U" shape or a square or circle so that group members face each other).

Guide the Discussion

1. **State the topic or objective as part of the introduction.**

    Example: "We have 5 minutes for this work. The topic of our discussion is _____ (creating a positive team climate). The purpose is to come up with ideas of ways to promote _____ (*trust, openness, closeness, or high energy*) as one of the conditions for creating a positive team climate.

    "Am I correct to think we all understand what a positive team climate is?" .....
        "Can we come up with a description of a positive team climate"

    "What are ways to promote _____ (*trust, openness, closeness, or high energy)*?

2. **Shift the conversation from the discussion leader to the team members.**

    Examples   "Abdul, would you share your thoughts on...?"
                        "Rosa, what is your opinion?
                        "Michelle, do you agree with my statement that...?"

3. **Act as a referee to intercede only when necessary.**

    Example: "It is obvious that Alain and Ilka are taking two sides in this discussion. Alain, let me see if I can clarify your position. You seem to feel that..."

4. **Summarize the key points of the discussion periodically.**

    Example: "Let's stop here for a minute and summarize the main points of our discussion."

5. **Ensure that the discussion stays on the topic.**

    Examples: "Sandra, can you explain a little more clearly how that idea relates to our topic?"
        "Monica, would you clarify for us how your point relates to the topic?"
        "Let's stop for a moment and review the purpose of our discussion."

6.   **Use the contributions of each team member and provide positive reinforcement.**

    Examples: "That is an excellent point, Rosminah. Thank you for sharing that with

the group."

7.   Minimize arguments among team members.

8. Encourage all team members to get involved.

> Example: "Maria, I can see that you have been thinking about this topic. Can you give us your thoughts?"

9.   Ensure that no one team member dominates the discussion.

> Example: "Christina, you have contributed a great deal to our discussion. Let's see if someone else has anything they would like to contribute to the discussion."

Conclusion

Conclude the discussion with a summary of the main ideas. The discussion leader must relate the summary to the objective presented during the introduction.

Exercise 7-2: Assessment of Team Climate

Use the following questions when assessing a team's climate.

Positive Group Climate

1. Are members encouraged and supported?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

2. Are members' contributions valued and accepted?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

3. Are all members involved in discussions?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

4. Does the group set high standards in establishing procedures and in evaluating decisions?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

5. Are personal issues dealt with compassionately? Do members fully accept the group's decisions?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

Negative Group Climate

6. Do members withdraw from the group by daydreaming, by whispering to others, or by wandering from the subject?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

7. Do members compete with each other by attempting to offer the most ideas, to play the most roles, or to talk the most?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

8. Do members act aggressively, criticize or blame others, show hostility, or deflate others?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

9. Do members use the group for self-confession by delving excessively into personal, non-group-oriented feelings or issues?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

10. Do members disrupt the work of the group by clowning or by acting flippant?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

11. Do any members argue for their own special interests or lobby unfairly?

    ❏ Yes   ❏ No

    What specific behavior do you observe?

12. Do any members block the group's progress by going off on tangents, by arguing too much about a belabored point, or by rejecting ideas without having given them due consideration?

❏ Yes   ❏ No

What specific behavior do you observe?

Module 8: Conducting Effective Meetings

Preparation

Review Reference Manual

Equipment, Materials, Supplies

❑ Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

❑ Review *Exercise 8-1: Ground Rules Worksheet*

❑ Review *Sample 8-2: Materials for planning meetings*

- Agenda for a Project Team's First Meeting
- Worksheet for Planning a Meeting
- Meeting Room Checklist
- Creating Agendas: Check List
- Sample Meeting Agenda
- Sample Meeting Agenda – Traditional Business Meeting
- Meeting Evaluation Sheet #1
- Meeting Evaluation Sheet #2

❑ Review *Exercise 8-3: Creating an Agenda for a Quality Improvement Team*

Room Arrangements

Participants should be seated at tables in groups of 6 people.

Overview

Purpose

The purpose of this module is to provide information of how to conduct team meetings, and how to identify opportunities for facilitation and training as part of meetings.

Objectives

At the end of this module participants will be able to:

- Identify key aspects of planning, conducting, and evaluating team meetings.
- Develop a detailed meeting agenda.
- Identify communication skills needed for conducting effective meetings.

Content	Time
Introduction	5 minutes
Why Have Meetings?	10 minutes
Meeting Ground Rules (+ First Team Meeting)	30 minutes
Planning, Conducting and Evaluating Meetings	60 minutes
Team Meeting Communication Skills	15 minutes
	Total time: 2 hours

Time/Materials   Content/Activities

Introduction

5 Minutes

OV 8-1

DISCUSS the purpose, objectives, and overview of the content.

Purpose

TELL participants the purpose of this module is to provide information of how to conduct team meetings, and how to identify opportunities for facilitation and training as part of meetings.

Objectives

OV 8-2

PREVIEW the objectives from the reference manual.

Overview

OV 8-3

PREVIEW the module contents.

Why Have Meetings?

10 Minutes

OV 8-4

ASK participants what bothers them most about meetings they attend?

ASK 3-5 people to share one thing that bothers them about meetings.

SELECT a recorder to **WRITE** these thoughts on newsprint.

DISCUSS that, from this list of complaints it will probably be clear what needs to be done in order to have effective meetings.

- Setting meeting ground rules.
- Planning each meeting by specifying meeting purpose and objectives.

- Creating and following an agenda
- Evaluating each meeting.

OV 8-5

DISCUSS the benefits of an effective meeting to answer the question "why have meetings?" from the reference manual

Meeting Ground Rules

30 minutes

OV 8-6, 8-7

Exercise 8-1: Ground Rules Worksheet

ASK the purpose of ground rules.

ASK what participants think some of the common ground rule topics should be. **ADD** any that are missed (based on reference manual information)

INTRODUCE the activity. (5 minutes)

- **TELL** participants to use *Exercise 8-1: Ground Rules Worksheet*
- **FORM** small groups.
- **TELL** groups to assign roles (team leader, timekeeper, recorder, coach - facilitator)
- **REMIND** the coach of *Exercise 4-1 – 4 step approach to group process interventions* – (s)he may want to use this
- **TELL** the groups they have 15 minutes for this work.
- **TELL** the groups the assignment is to develop a ground rule for each of the topics, following the specific process described in the exercise.

CONDUCT the activity. (15 minutes)

- **WATCH** the groups and assist as needed.

SUMMARIZE the activity. (5 minutes)

- **ASK** for a ground rule for each topic, going from group to group
- **ASK** for reactions to the structure of the group work (note this is one way to avoid the group being taken over by a strong members providing all the answers)

First Team Meeting

OV 8-8

Sample 8:2: Agenda for a Project Team's First Meeting .

DISCUSS unique features of the first meeting of a team starting an improvement activity, based on reference manual information. Refer to *Sample 8:2: Agenda for a Project Team's First Meeting* .

EMPHASIZE the need for team building and technical training to get the team started with their Forming stage.

Planning, Conducting, and Evaluating a Meeting

60 Minutes

OV 8-10

DISCUSS how effective meetings happen (from Reference Manual).

Sample 8-2: Materials for Planning Meetings

TELL participants there are several meeting planning and evaluation tools in their participants manual which they may use when they return home, They are within *Sample 8-2: Materials for Planning Meetings*

- Worksheet for Planning a Meeting
- Meeting Room Checklist
- Creating Agendas: Check List
- Sample Meeting Agenda
- Sample Meeting Agenda – Traditional Business Meeting
- Meeting Evaluation Sheet #1
- Meeting Evaluation Sheet #2

Planning a meeting

OV 8-11

DISCUSS with participants the two parts of meeting planning (based on the reference manual): defining the meeting objective and creating an agenda.

OV 8-12

DISCUSS the four types of activities mentioned in the reference manual which usually help define the objective of the meeting

- Information Giving
- Discussion
- Decision-making
- Task Oriented

Conducting a Meeting

OV 8-13, 8-14

DISCUSS information from the reference manual about:

OV 8-15
OV 8-16
OV 8-17

- How to open a meeting: state the purpose of the meeting and what needs to be accomplished, and review the agenda.
- Benefits of using and following an agenda
- Components of an agenda
- Sample agenda structure

OV 8-18

- How to close a meeting: summarize / review work, confirm agreements, plan next agenda

Sample 8-2: Materials for Planning Meetings

Refer participants to agenda samples included in *Sample 8-2*.

OV 8-19

Evaluating the Meeting

Sample 8-2: Materials for Planning Meetings

DISCUSS information from the reference manual about simple ways to evaluate meetings. Refer participants to the meeting evaluation forms included in *Sample 8-2*.

Exercise 8-3: Creating an Agenda for a Quality Improvement Team

Exercise 8-3: Creating an Agenda for a Quality Improvement Team

INTRODUCE the exercise

- **FORM** teams of 4-6 people.
- **REVIEW** the scenario and task as stated on the exercise sheet. (You may use another example depending on your audience and the focus of the training program.)

CONDUCT the exercise.

- **WATCH** team work and assist if needed.
- **STOP** the work after 15 minutes
- **ASK** teams what they identified as agenda items. Go from team to team to get all topics. Point out any items you think are missing or unneeded.

SUMMARIZE the exercise.

- **ASK** participants if they found the agenda template helpful, or how they would improve it.
- **REEMPHASIZE** the benefits and importance of planning for opening, closing and evaluation activities.

Team Meeting Communica-tion Skills

DISCUSS information from the reference manual, and use personal examples to illustrate,

- Active listening
- Assertiveness

OV 8-21, 8-22, 8-23

15 Minutes

Transition

REVIEW module objectives and link them to other work done today.

Exercise 8-1: Ground Rules Worksheet

Instructions

The goal is to develop a ground rule for your training team on each of the topics listed on the next page, following this process.

1. The leader will ask the person on his/her right to propose a ground rule for the first topic, Attendance.

2. The leader will ask if everyone agrees or if there is a change that someone else would like to propose. If a change is suggested, the leader will ask the training team to vote on the change - for the sake of this exercise, majority rules.

3. The recorder will write the agreed upon ground rule on the sheet.

4. This process will continue with the next person proposing a ground rule on the next topic, Promptness.

The time keeper will keep track of time. You have 15 minutes for this work (including introduction, activity, summary/close).

Our Team's Ground Rules	
Attendance	
Promptness	
Meeting Place and Time	
Participation of Team Members	
Basic Courtesies	
Assignments	
Interruptions	
Breaks, Eating, Drinking and Smoking	
Routine Chores	

Sample 8-2: Materials for planning, conducting and evaluating meetings

Agenda for a Project Team's First Meeting[1]

This agenda can be a model for your first meeting of a QI project team.. This model includes time estimates for each item (for a total meeting length of about 3.5 hours). Keep track of the actual times so you can get good at predicting how long your meetings will have to last. If you think that you will not have enough time to finish all of the items, indicate which are "musts" for this meeting. This format differs slightly from that for regular meetings because there is a great deal or orientation and just-in-time technical training to allow the team to begin improvement work.

Project / Team Name: _____   **Meeting Date** _____
Team aim / goal: _____ (as assigned by a higher committee, if a specific improvement aim has been identified)
1. Review this agenda (5 min) • Add items, delete items, estimate the time needed for each item. • Rank the items: must do today/should do today • Note item types: announcement, discussion, decision, action.
2. Brief introductions by team members (10 min)
3. Review the aim / goal statement from the management team (15 min.)
4. Explain the goals of this meeting (10 min.)
5. Get acquainted with each other (35 min. total) • An icebreaker in pairs followed by a group activity (20 min) • A more detailed discussion of the process targeted for improvement. A description by all members of their roles in that process. (15 min)
6. Define the roles of the team leader, coach, and team members (10 min)
7. Set ground rules and housekeeping rules (10 min)
8. An introduction to some basic concepts (60 to 90 min) • Discuss the principles of Improvement • Discuss the steps in quality improvement • Define the process that has been chosen for improvement and how these improvements will fit in to larger improvement efforts (if applicable) • Define customers and suppliers in the process • Define major steps / components in the process • Discuss this team's relationship with the management team, including reporting expectations
9. An assignment for the next meeting: date, time (10 min)
10. Meeting Evaluation: questions and discussion (15 min)

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[1] Adapted from Scholtes, Peter R. *The Team Handbook*, Joiner Associates, Inc., Madison, Wisconsin, 1988.

Worksheet for Planning a Meeting

1. Objective: What key results do you want to achieve - what information must be presented and what decisions must be made?

_____

_____

_____

2. Timing: How long should the meeting last? When is the best time to hold it?

_____

_____

_____

3. Participants: Who should attend? Be sure to include those with authority to decide, whose commitment is needed, and those who need to know.

_____

_____

_____

4. Agenda: What items should be dealt with? Who is responsible for preparing and distributing the agenda? How will participants help in developing the agenda?

_____

_____

_____

5. Physical Arrangements: What facilities and equipment are required? How should the meeting room be arranged?

_____

_____

_____

6. Role Assignments: What role assignments need to be made? For example, scribe, secretary, timekeeper, and discussion moderator.

_____

_____

_____

7. Evaluation Method: How will the meeting be evaluated in order to improve the next session?

_____

_____

_____

Meeting Room Checklist

The following checklist summarizes the key requirements for an acceptable meeting room. Use it to see if the potential meeting room will meet your needs.

1. Is the room large enough to comfortably accommodate the participants and any planned audiovisual aids?

   ❑ Yes   ❑ No

2. Is there adequate lighting and ventilation? Can they be controlled within the meeting room?

   ❑ Yes   ❑ No

3. Is the room free from distractions and interruptions such as telephones, loud noises, or other activities?

   ❑ Yes   ❑ No

4. Is the room appropriately furnished? Are the chairs comfortable enough for the length of the meeting?

   ❑ Yes   ❑ No

5. Is the room conveniently located for participants?

   ❑ Yes   ❑ No

6. Is the cost of the room within budget?

   ❑ Yes   ❑ No

7. Is the room available at the time you need it?

   ❑ Yes   ❑ No

Creating Agendas: Check List

Use this check list in creating an agenda for an effective team meeting.

1. General Information and Logistics

❑ Who is: leading the meeting, time-keeper, recorder, and coach

❑ Who is attending the meeting

❑ Date

❑ Starting time

❑ Ending time

❑ Place

2. Agenda

❑ Determine the overall meeting objective(s)

❑ Sequence or prioritize agenda items

❑ State the purpose of each item (information, discussion, decision, task)

❑ Identify the person(s) responsible for each item

❑ Indicate the time allocated for each item

3. Preparation

❑ Schedule the meeting room

❑ Prepare and distribute background materials

❑ Prepare and distribute the agenda prior to the meeting (at least one day, but not more than one week ahead)

Sample Meeting Agenda

Project Team _____   **Goals for Improvement:**_____

Note: Have your team goals listed on the agenda. They can be typed onto the master before it is copied.

Meeting Date_____   **Meeting Objective:**_____

Item type: Information discussion decision task	Must do - ★ Should do - ●	Time Estimate

1. Icebreaker

2. Review of Agenda:

Add Items, delete items, estimate the time needed for each item. Rank the item: must do today, should do today.

3. Status reports on individual assignments

   (list assignments here.)

4. Other reports, presentations, activities or discussions (list here.)

5. Review of the status of our projects. Where are we now relative to our plan?

6. Assignments for follow-up activities (what? by whom? due date?)

7. Upcoming events, presentations, special meetings, etc.

8. Agenda Items for our next regular meeting (list here)

9. Special activity scheduled for this meeting

10. Meeting evaluation: questions and discussion

Total Time

Sample Meeting Agenda – Traditional Business Meeting

Time	Topic	Purpose	Person responsible
5 minutes	Opening Preview agenda	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Get feedback about any changes to last meeting minutes, make changes	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Recorder
5 minutes	Announcements	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader or members
15 minutes	Old Business Topic 1:	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
15 minutes	Old Business Topic 2:	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
10 minutes	New Business Topic 1:	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
10 minutes	New Business Topic 2:	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
5 minutes	Closing: Review and summarize the meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Closing: Review action steps to be taken	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Closing: Plan agenda for next meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	All team members
5 minutes	Evaluate the meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Coach

Meeting Evaluation Sheet #1

What went well that we should continue doing?

How could we improve the next meeting?

Meeting Evaluation Sheet #2

1. To what extent did this meeting meet its stated objectives?

      Not at all   1   2   3   4   5   Completely

2. To what extent did this meeting achieve your personal objectives?

      Not at all   1   2   3   4   5   Completely

3. What aspects of the meeting would you like to continue?

4. What practices or behaviors would you like to stop?

5. What new practices or behavior would you like to see started?

Exercise 8-3: Creating an Agenda for a QI Team

Scenario

Imagine your team is one of three QI teams working to improve patient compliance with ARI Treatment Regimens for children under age 5. Your team is assigned the task of improving staff use of the ARI Standard Treatment Guidelines.

You are completing a meeting at which you decided that the next meeting will focus on the development of a flow chart to help analyze the current process of assessing and treating children under 5 with ARI.

Instructions

Your task is to develop the agenda for the next team meeting. At least three types of activity must occur – information giving or discussion, decision, and task – use of a QI tool.

Remember in doing your work to assign team roles and respect time limits. You have 15 minutes for this exercise.

1. Complete the logistics / organizing for the meeting.

Date:	
Time begin:	
Time end:	
Team Roles:	Leader: Recorder: Timekeeper: Coach:

2. What are possible agenda items for the team if the task is to draw a flow chart of the current process of assessing and treating children with ARI? Consider the following:

    What information must be presented?

    What issues must be discussed?

What QA tools may be used?

What do team members need to do to be prepared for the meeting? (reading? information or data gathering?)

What just-in-time training might be needed?

What decisions must be made?

What actions must occur after the meeting?

When will the agenda and preparation materials be distributed?

3. Complete the agenda template on the following page, using the above information.

Time	Topic	Purpose Check most appropriate	Person responsible
5 minutes	Opening Preview agenda	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Review the work to date	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Recorder
5 minutes	Announcements	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
		❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
		❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
		❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
		❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	
5 minutes	Closing: Review and summarize the meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Closing: Review action steps to be taken	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Team leader
5 minutes	Closing: Plan agenda for next meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	All team members
5 minutes	Evaluate the meeting	❏ Inform ❏ Discuss ❏ Decide ❏ Do a Task	Coach