II. How to Create a Project Team

Team Pre-Planning
Topic Outline

I. Guidelines for Team Leader and Facilitator

II. Selecting Team Members

III. Roles and Responsibilities

Guidelines for Team Leader and Facilitator

- Choose team membership and may modify the team over time

- Discuss whether substitute members are appropriate for the team

- Set criteria for team absenteeism

- Follow-up with missing team members

Selecting Team Members

- All levels involved in the process should be represented on the team

- Interdisciplinary

- Should include informal leaders and early adopters in the system

- Teams should be closed with invited guests to work most efficiently

- Ideal size of a team:

  - <6 – may not represent process completely

  - >12 – becomes too large to work effectively

Roles and Responsibilities

- **Team Leader:** works with facilitator to develop a plan for the team and coordinates and directs the work of the team as it studies the process and implements improvements. During the meeting, the leader guides the meeting, contributes input and participates with the team. Meets with the facilitator outside of team meeting for planning and processing of meetings.

Roles and Responsibilities

- **Team Facilitator:** team advisor who has expertise in the Performance Improvement (PI) process. Teaches PI methods and provides feedback to the team members on the progress of their work. Helps the team develop self-sufficiency in working as a team and applying the technical tools of PI. The involvement of the facilitator decreases over time as the team and leader gain more knowledge and skill. Meets with the team leader outside of team meeting for planning and processing of meetings.
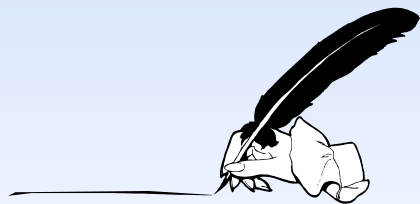
Roles and Responsibilities

- **Timekeeper:** typically a rotated position; helps the team manage time during the meeting. The team actually manages the time but the timekeeper makes the team aware of the time remaining on the agenda.

Roles and Responsibilities

- **Team Recorder:** typically a rotated position, which helps the team maintain a written record of its work.

- **Scribe:** can be an active team member or the facilitator, but usually not the team leader.
  - For example, posts ideas on flipchart from brainstorming, checks with team for accuracy.

Roles and Responsibilities

- **Members:** actively participate, collect data and study the process they are trying to improve, contribute ideas, analyze data, make decisions, plan future work, help the team stay on track and support collaboration. Each member understands that they are representing their peers.