
FORMING AND DEVELOPING TEAMS

A Tip Sheet from Revolutionizing Engineering Departments (RED) Participatory Action Research

Forming a capable and efficient team is a key tactic for change management. In addition, teams require specific development if they are to operate effectively together to accomplish their goals. This tip sheet presents strategies for forming and developing teams, using research findings resulting from focus group discussions and conference calls with the National Science Foundations RED grantees. The quotes from research participants highlight these findings. Contact us at redpar@rose-hulman.edu for additional information.

Bring Together Both the Key Players and Proven Leaders for the Change Project*

The size and scope of many change projects require the formation of a project team. Selecting who should be on this team is a crucial first step. John P. Kotter, author of *Leading Change* (2012), suggests that change agents build a “guiding coalition” for the project, a “powerful force” that has the right members who share a level of trust and a shared objective to accomplish.

➔ **TIP:** Recruit individuals who possess position power on your campus. This power may be reflected in their roles, titles, or other markers. Team members with position power can use their positions to ensure that progress is not stalled or blocked. The team should also consist of proven leaders who have demonstrated that they can drive the change process. The team should be respected by others in the institution so that the teams’ ideas and changes will be taken seriously. Membership in the coalition can also offer those new to major change projects the opportunity to cultivate their experience and build campus credibility.

“I think there's advantages and disadvantages to the team around this table by having the dean and chairs be the PIs. On the one hand, it gives untenured faculty the comfort of knowing that this is a valued activity and if they participate, it will be rewarded and appreciated in their tenure packet. It also means it's really top down.” [RED Project Co-PI]

Invest Time to Cultivate Trust Among Team Members

Teams who are embarking on change projects often get to work quickly to accomplish tasks. They frequently neglect to invest the time needed to cultivate trust among team members who may not have worked together before. A team may find it beneficial to engage in some initial activities that help team members get to know one another, such as a project retreat or workshop. If the activities the team engages in encourage respect and mutual understanding, then you have provided the team opportunities to build trust.

➔ **TIP:** Invest time building trust within the team. Change projects require that team members take risks and invest their own credibility on campus. Team members must trust one another enough to engage in risk-taking, knowing that their team will back them up. Schedule a workshop or project retreat that contributes to the development of the team. It may be the case that team members need to build their group expertise on a particular dimension of the change project. A learning environment like a workshop can allow team members to do that.

“Several of us had not worked together on a research project before, but we’ve been collaborating for a long time. We’ve worked on other projects together. We have immense respect for each other. Even if we disagree, we disagree respectfully.” [RED Project PI]

Recognize and Value the Expertise of Team Members

By bringing together a diverse and credible group of individuals as the guiding coalition, you have the opportunity to leverage a broad array of skills, knowledge, and abilities to accomplish goals. It is important, therefore, to inventory this expertise and to address any gaps that may impact results.

➡ **TIP:** Engage individuals who bring a wide range of relevant points of view and skill sets. This will allow the team to make decisions based on the best available practices, information, and data. An inventory of the team members' skills can help identify any gaps that should be addressed early in the project. Taking time to value this expertise explicitly builds respect among team members. Remain open to recognizing gaps in expertise on the team as the project progresses and add team members appropriately.

"I didn't realize how much we needed a project manager until we had one. Our own team had serious issues with communication, with time management, with prioritization, and it's because not a single person on the team has been trained to do that, and it's not necessarily, I mean it's not our strong suit. We're researchers. . . Now that we have a project manager, I'm kind of wondering how could we have ever expected to be successful without one?" [Social Scientist, RED Project Team]

Develop Norms to Facilitate Team Governance and Decision-Making

At the early stages of the change project, it is important to establish team norms, the set of rules for conduct that are mutually agreed to by the members of the team. Jon R. Katzenbach and Douglas K. Smith, authors of "The Discipline of Teams" (2005), suggest that these rules address meeting attendance, discussion, confidentiality, and constructive contributions. By explicitly setting expectations early in the project, you can ensure that the team will not be derailed by misunderstandings and miscommunication.

➡ **TIP:** Invite team members to engage in the process of writing a Team Contract, the rules that will govern their conduct while they on the team. These rules clarify how each team member will contribute to the project work, what the decision-making process will be, and how accountability will be assessed. The Team Contract should be revisited periodically throughout the life of the project, with each team member given the opportunity to suggest revisions. This is particularly important when new members of the team are added.

Check out other REDPAR Tip Sheets that can help, available at academic.change.org/

- **Communicating Change**
- **Creating Shared Vision**
- **Creating Strategic Partnerships**

*Material for this Tip Sheet is drawn from John P. Kotter's *Leading Change* (Boston, MA: Harvard Business Press, 2012), and Jon R. Katzenbach and Douglas K. Smith's "The Discipline of Teams" (Harvard Business Review, July/August 2005).

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