

TIDEE

Transferable Integrated Design Engineering Education



Professional Development

Section 2: Team Roles

This section includes:

- **Structuring Roles for Team Meetings**
- **Using Team Roles for Learning**
- **Defining New Team Roles**

The activities in this section are aimed at helping you understand the various roles you and your team members will hold as part of a project based team. While looking toward the end goal, it is critical to focus efforts of individual members by building defined responsibilities into your team structure through the establishment of formal and informal “roles.” A brief overview of the activities is provided below:

Structuring Roles for Team Meetings is an activity that prepares your team to conduct and participate in effective meetings. Your time is valuable. Engaging in productive meetings is an important component that effects the timely completion of project deliverables.

Using Team Roles for Learning builds upon the first activity. The intended outcome is to further develop your professional skills and knowledge of team roles to maximize your team’s effectiveness. Team roles include Manager, Recorder, Reporter, and Reflector.

Defining New Team Roles is an opportunity to strategically assign new roles to team members in order to achieve a specific objective. Team members are expected to harness their collective creativity to brainstorm performance criteria for proposed team roles.

Activity: Structuring Roles for Team Meetings

Meetings are important events in the lives of teams, but many times they are only marginally productive. Because meetings provide unique opportunities and demand valuable time from team members, they must be made effective and efficient. In this activity, you will identify important purposes of team meetings and define methods to maximize benefits of team meetings.

Objective: Identify elements of effective meetings and plan an organizational structure and processes that ensure the success of every meeting.

Tasks

1. Assign members of your team to roles identified in the Team Roles and Criteria for Assessment handout (attached): Team Manager, Recorder, Reporter, Reflector.
2. List and prioritize the purposes of team meetings (whether you meet alone or with clients) as part of a design team's product development effort. Record your ideas on the Team Meeting Planning worksheet. Example purposes might include: decisions, understanding, etc.
3. For your top five purposes, define evidences that each purpose has been achieved well. What might be a deliverable indicating that the purpose was achieved, and what about the deliverable indicates quality? Examples of evidence might include: completeness and accuracy of documentation.
4. Write performance criteria for team roles that you judge essential for highly productive team meetings. What roles are crucial? What are the top three performance criteria for each role to support excellent meetings?
5. Complete the Team Meeting Planning worksheet to document your team's plans for organizational or procedural structure to ensure effectiveness of meetings.

Deliverables

1. Reporter:
 - a. Identify an element of your team meetings that presently is effective in achieving your purposes.
 - b. Identify one element of your team's meeting plan that will produce significant improvement in future meeting effectiveness.
2. Reflector: Report an insight the team gained regarding planning or management of team meetings.
3. Team assignment (due next class period): Prepare 1-to-2 page Team Meeting Guidelines document that defines your team's purposes, procedures, and responsibilities to ensure effective team meetings.

Criteria for Success

- Team members are able to recognize quality performance in team meetings.
- Team members are able to define ways to ensure effective team meetings.
- Teams show a commitment to conducting effective team meetings.

Resources

- Handout: Team Roles and Criteria for Assessment
- Worksheet: Team Meeting Planning
- 20 minutes of team discussion time

Handout: Team Roles and Criteria for Assessment*

Team Manager

The Team Manager is responsible for ensuring that the team achieves its goals on time.

- Criteria
1. maximizing overall performance of the team
 2. achieving team goals by systematic use of process
 3. setting meetings and meeting details
 4. planning project schedule and intermediate mileposts to achieve timely results
 5. maintaining team focus
 6. ensuring member performance within their roles
 7. keeping everyone involved in the learning and problem solving processes
 8. keeping the process enjoyable and rewarding for everyone
 9. ensuring that every team member can articulate what has been learned
 10. participating in the learning and problem solving process

Recorder

The Recorder is responsible for documenting group activities.

- Criteria
1. effective documentation of interactions
 2. capturing essence of ideas
 3. communication of complex ideas
 4. assessing information and raising questions as needed
 5. legible, articulate recording of information for permanent record
 6. actively participating in the learning and problem solving process

Reporter

The Reporter is responsible for disseminating group consensus.

- Criteria
1. effective organization of information
 2. synthesis of ideas
 3. clarity and conciseness in oral communication of complex ideas
 4. assessing information to identify most important parts
 5. effective use of visuals to communicate information
 6. actively participating in the learning and problem solving process

Reflector

The Reflector is responsible for development of the team's process skills.

- Criteria
1. observing group interactions and progress
 2. providing feedback on the learning and problem solving processes
 3. forming observations into constructive statements
 4. providing regular (every 15 min.) updates on process strengths, improvements, insights
 5. giving suggestions on improving the team's time efficiency
 6. performing as an active learner and problem solver

* Adapted from: Duncan-Hewitt, Wendy, David Mount, and Dan Apple. 1994. *A Handbook on Cooperative Learning*. Pacific Crest Software, Corvallis, OR, pp. 15-19.

Worksheet: Team Meeting Planning

TEAM PURPOSES

Purpose

Quality Criteria

PROCEDURES

RESPONSIBILITIES

Activity: Using Team Roles for Learning

Team meetings are used for a number of purposes, including: communication, management of team resources, and learning. Standard member roles used in team meetings ensure that meeting tasks are accomplished well and that all team members participate actively. However, effective performance of team roles can also enhance learning of professional skills. This activity should expand your thinking about using team role assignments to achieve greater professional development during team meetings.

Tasks

Teams assign members to roles identified in the handout (attached): Team Manager, Recorder, Reporter, Reflector.

1. Individuals review criteria for their assigned role (see handout) and determine what skill development is required for effectiveness in their assigned role.
2. Individuals summarize for their teammates the learning or skill development associated with their assigned role.
3. Team members develop consensus on the most important skill development to be achieved in each team role for overall team effectiveness.
4. Team members identify procedural changes they can make in team meetings to facilitate achievement of the desired skill development during team meetings.

Deliverables

1. The team Reporter presents orally the team's consensus on:
 - a. The most important skill development associated with each team role
 - b. Procedural changes for improving skill development through team meetings.
2. The team Reflector provides three reflective two-sentence statements beginning as follow:
 - a. Our team's primary strength in this activity was It caused
 - b. An area of team performance needing improvement is Changes will produce these benefits
 - c. An insight I gained from this activity is It will enable me to

Criteria for Success

- Team members are able to link skill development with each role.
- Team members identify effective ways to enhance learning through team meetings.
- Teams exhibit a desire for self improvement.

Resources

- Handout: Team Roles and Criteria for Assessment
- Worksheet: Plans for Team Development
- 15 minutes of team discussion time

Handout: Team Roles and Criteria for Assessment*

Team Manager

The Team Manager is responsible for ensuring that the team achieves its goals on time.

- Criteria
1. maximizing overall performance of the team
 2. achieving team goals by systematic use of process
 3. setting meetings and meeting details
 4. planning project schedule and intermediate mileposts to achieve timely results
 5. maintaining team focus
 6. ensuring member performance within their roles
 7. keeping everyone involved in the learning and problem solving processes
 8. keeping the process enjoyable and rewarding for everyone
 9. ensuring that every team member can articulate what has been learned
 10. participating in the learning and problem solving process

Recorder

The Recorder is responsible for documenting group activities.

- Criteria
1. effective documentation of interactions
 2. capturing essence of ideas
 3. communication of complex ideas
 4. assessing information and raising questions as needed
 5. legible, articulate recording of information for permanent record
 6. actively participating in the learning and problem solving process

Reporter

The Reporter is responsible for disseminating group consensus.

- Criteria
1. effective organization of information
 2. synthesis of ideas
 3. clarity and conciseness in oral communication of complex ideas
 4. assessing information to identify most important parts
 5. effective use of visuals to communicate information
 6. actively participating in the learning and problem solving process

Reflector

The Reflector is responsible for development of the team's process skills.

- Criteria
1. observing group interactions and progress
 2. providing feedback on the learning and problem solving processes
 3. forming observations into constructive statements
 4. providing regular (every 15 min.) updates on process strengths, improvements, insights
 5. giving suggestions on improving the team's time efficiency
 6. performing as an active learner and problem solver

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Worksheet: Plans for Team Development

TEAM MEMBER SKILL DEVELOPMENT NEEDS

Team Manager

Recorder

Reporter

Reflector

PROCEDURAL CHANGES

Activity: Defining New Team Roles

Teams are formed to attain goals that can not be achieved by individuals alone. Powerful results are realized when many facets of a problem or assignment are addressed simultaneously by various team members. By strategic assignment of roles to team members, a team can ensure that important objectives are given proper attention. In this activity, you will explore the definition of new team roles to achieve important project-related goals.

Tasks

1. Assign team members to roles/responsibilities important to this activity.
2. On the worksheet, define performance criteria for the team role: “Innovator.”
The person in this role should generally ensure that creativity and innovation are applied effectively in all appropriate team activities.
3. Identify an important overarching **goal** for your team’s long-term efforts (e.g., efficiency, creative solutions, quality products) and name a team **role** that can support achievement of this goal.
4. On the worksheet, define performance criteria for your new team role.

Deliverables

1. The team Reporter presents orally:
 - a. Two performance criteria for the “Innovator” role
 - b. The proposed new role and its associated team goal
 - c. Three performance criteria for the new team role
2. The team Reflector presents:
 - a. An example of how our new team role was evidenced in members during this activity
 - b. Expected impacts of the new team role on your team’s performance
 - c. An insight you gained from this activity.

Criteria for Success

- Team members are able to identify a new role that adds quality to their learning or overall performance.
- Team members recognize that they have the ability to structure teams to achieve key goals.
- Teams identify role criteria that guide members in achieving high performance.

Resources

- Worksheet: Performance Criteria for Team Innovator
- Worksheet: Performance Criteria for New Team Role
- 15 minutes of team discussion time

Worksheet: Performance Criteria for Team Innovator

Team Innovator

The Team Innovator is responsible for ensuring that the team applies creativity and innovation effectively in all appropriate team activities.

Performance Criteria: The effective Team Innovator should:

a.

b.

c.

d.

e.

f.

g.

Worksheet: Performance Criteria for New Team Role

Role: Team _____

The Team _____ is responsible for _____

The effective Team _____ does the following:

a.

b.

c.

d.

e.

f.

g.