Team Formation

Teamwork is a powerful tool for change. Teams work best when each team members' strengths and unique experiences are valued and drawn upon to do the work. You will need a team to implement organization change using the Plan-Do-Study-Act (PDSA) model. This guide offers information on team member selection, team expectations, recruitment, and hosting a team kickoff meeting.

Team Member Selection

Team size should be based on the breadth and depth of the scope of the organizational improvement project. A typical team size is 5-8 people, but may range from 3 to 12 people in size.

Team Composition

Every person must be chosen for a purpose and reflect the following:

- People who **do the work** that is the focus of the organizational change;
- Effective **problem-solvers;** and
- Offer **'a different set of eyes'** such as:

  - Represent different units, job types, or stakeholders; and
  - Have varying levels of experience (new workers who have just experienced training offer valuable input as do seasoned workers).

Other criteria to help identify team members include:

- A desire to improve their own abilities and the outcomes for children and families;
- Creative and innovative thinkers;
- Viewed as opinion leaders by their peers and colleagues;
- Champions of new ideas and learning techniques;
- Excellent interpersonal, facilitation, and listening skills;
- Open to new ideas and ways of doing things;
- Have a history of successfully adapting to change; and
- Are committed and proactive in implementing change.

Team Member Expectations & Recruitment

If you are the team leader, you will need to recruit team members, establish team expectations, and create a positive culture for change for your team. It is recommended that when you recruit team members (either in-person or via email), you share the following information in your communication:

- Purpose of the team;
- Why this individual has been asked; and
- Expectations for participation.

Please feel free to use the email example below to recruit team members.

Dear _____,
I would like to ask you to be part of the team working on improving _____ at our agency. You have been identified as someone who is works in the targeted change area and you bring a unique perspective that will help this team brainstorm rich ideas and implement effective solutions. **Please let me know if you would like to participate on the team by _____.** Below is a list of expectations so you can understand whether the commitment will work for you.

Team members are expected to:

- Be open-minded and respect all suggestions,
- Leverage the expertise of all team members,
- Treat all team members as equal peers,
- Maintain a positive attitude, and
- Contribute to the work - do what can be done now with the resources at hand.

You will be asked to: *(MODIFY TO FIT YOUR PROJECT)*

1. Meet at least twice a month for internal team meetings.
2. Participate in brainstorming about issues.
3. Test small changes (solutions) in your daily work as a part of a small team or individually.
4. Collect and share simple data measures.
5. Be willing to share what you are learning with co-workers (outside the team).

Thank you.

Team Kick-off Meeting

After recruiting team members, the team leader will need to host a kick-off meeting. The table below displays suggestions for kick-off meeting activities and can be used to build your kick-off meeting agenda.

Agenda Item	Activity	Purpose
Welcome & Introductions	Complete introductions and facilitate ice-breaker activity.	Builds team cooperation
Project Overview	Team leader reviews purpose of project, team member expectations, and time/effort commitment. Summarize expectations section above.	Builds focus and shared understanding
Team Rules	Team leader facilitates ground rules discussion: what would help our team function most effectively? Take group input and add to expectations already discussed.	Builds engagement & cooperation
PDSA Models	Explanation of the Plan-Do-Study-Act (PDSA) model using 'What is PDSA?" toolkit resources.	Builds knowledge
Project Charter & Goals	Team leader should use the charter tool in the PDSA toolkit to complete part 1 of the charter with the team. Next, use the goal setting tool in the PDSA toolkit to assist your team to write an overall project goal to be entered under Goal Statement in part 2 of the charter. (NOTE: Goal setting can be done at the next meeting if preferred.)	Builds engagement & cooperation
Team Roles	Team leader asks for volunteers. Volunteers can be recruited for meeting note-taker, meeting scheduler, data/measurement lead, and PDSA change implementer (all team members will take this last role).	Builds shared ownership and distributed workload
Next Meeting	Schedule one or more future meetings.	Builds accountability and momentum

OPI
Organizational Process Improvement