



Team Development Measure™

Facilitator Training

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Welcome

Thank you in advance for your willingness to support the success of Patient Aligned Care Teams (PACT) throughout VISN23. Your support helps our PACT teams continue the journey of forming in a new way to serve Veterans.

The Team Development Measure™ (TDM) is a primary tool to facilitate team connections, and also guide a plan for ongoing team growth and development. Your role as a neutral and objective facilitator adds value by:

- ▶ Providing skilled guidance for a productive team discussion
- ▶ Engaging all team members in processing TDM results
- ▶ Reinforce healthy participation, processing and planning
- ▶ Provide tools to enable meeting structure and action planning

Learning Objectives

This training experience prepares you to accomplish the following as a team facilitator:

- ▶ Describe TDM and how it supports team development
- ▶ Align your approach with other facilitators supporting PACT teams
- ▶ Describe your role and goals as facilitator
- ▶ Facilitate team meetings to process TDM results
- ▶ Create consistent TDM processing experiences for all PACT teams
- ▶ Report results to assist with measurement and analysis of team growth

Team Development Measure™

Teams are an integral part of the ongoing success of providing patient aligned care. Team development is vital to the creation of high performing teams. The Team Development Measure® (TDM) is designed to help teams evaluate stages of development and identify strategies for working together more effectively.

The tool indicates the degree to which a team has and uses the components needed for highly effective teamwork. Teamwork components consist of:

Cohesiveness: The first component put into place as a team develops is cohesiveness (attraction of the members to the team). Cohesiveness is the social glue that binds the team members together as a unit. Without cohesiveness, it is extremely difficult for a team to attain the other components of a developed team.

When a team is cohesive, team members:

- ▶ Are attracted to the team,
- ▶ Find membership in the team to be a personally meaningful experience,
- ▶ Enjoy the company of the other team members,
- ▶ Support, nurture, and care for each other,
- ▶ Feel free to share ideas and suggest ways to improve team function,
- ▶ Feel they are using their unique skills for the benefit of the team,
- ▶ Have a strong “we” feeling, and
- ▶ Routinely develop creative solutions to problems.

Communication: The next component of team development is communication. Communication involves a full range of topics, including decision-making and problem-solving. Effective communication becomes easier once the team has developed a certain level of cohesiveness. Communication is, of course, key, since further team development and effective functioning cannot occur without team communication.

When a team is effectively communicating, team members:

- ▶ Always freely say what they feel and think,
- ▶ Are always direct, truthful, respectful, and positive,
- ▶ Openly discuss all decisions before they are made,
- ▶ Handle conflict in a calm, caring, and healing manner,
- ▶ Openly explore options to solve problems when they arise,
- ▶ Do not talk about each other behind their back, and
- ▶ Do not have a hidden agenda.

Role Clarity: The next component to becoming part of a higher functioning team is clear role definitions and expectations. The role of “team member” supersedes individual professional roles. While professional roles brought to the team give the team its potential strength, equally, if not more, important for team development is that individuals feel equally valued as members of the team. Additionally, team members should know who is doing what and what other team members expect of them.

When a team achieves role clarity, team members:

- ▶ Feel that accomplishments of the team are placed above those of individuals,
- ▶ Understand the roles and responsibilities of all other team members, and
- ▶ Have a clear understanding of what other team members expect of them.

Goals & Means Clarity: The final component of team development to become a fully functioning and high-performing team is clearly defining team goals and the means to be used to reach these goals.

When a team achieves goals and means clarity, team members:

- ▶ Have clarified and agreed upon what the real work of the team is,
- ▶ Clearly understand the goals of the team,
- ▶ Agree on how to reach the team goals, and
- ▶ Agree upon clear criteria for evaluating the outcomes of the team.

Facilitation Success Factors

There are common facilitator success factors that guide us in this effort. This reference guide is a tool to help you understand your role as facilitator, prepare for a successful experience, guide meeting flow and participation, and help the team complete an action plan for ongoing success.

1. **The Role of Facilitator** – Your goal as team facilitator for this experience is to provide objective leadership, guide discussion and help the team get results. The fact that you are not an active team member allows you to share a neutral and objective perspective. In addition, team members at all levels can engage in discussion and planning without the responsibility of meeting leadership.
2. **Preparation** – The key to any successful experience is effective preparation. This guide provides you with a series of checklists to help you take important steps before, during and after the TDM processing meeting.
3. **Structure & Flow** – Clarity can be challenging with it comes to meetings. The best way to help teams stay focused during meetings is to provide structure that guides the flow of interaction. Use the agenda provided in this reference guide to set meeting expectations and guide the flow of discussion and planning during the meeting.
4. **Interactivity** - Involvement equals commitment when it comes to team discussions and decisions. Use the techniques provided within this reference guide to help you engage all team members in discussions and associated action planning.
5. **Action Planning** - The outcome of the Team Development Measure processing meeting is a team action plan based on team-specific TDM results. The goals of your meeting are to (1) process TDM results, (2) pinpoint broad areas of opportunity and (3) identify realistic action steps to support momentum in each area. As the facilitator, you are responsible to help the team create a valuable and realistic action plan.

1. The Role of Facilitator

Understanding your role and sticking to it is important for you and the team to achieve target outcomes. Consider the following areas of responsibility. Your role as facilitator is to:

- ▶ Work with the team to schedule a 90-Minute team meeting to process TDM results. Decide who is accountable to reserve adequate space for the meeting.
- ▶ Use the agenda as a leadership tool. This is your vision of success. Make sure the agenda is distributed to all team members prior to the meeting and followed during the meeting to keep the team focused.
- ▶ Assign team roles for the meeting. Involving the team in self-management is a way to create ownership within the team and not just with the assigned leader or facilitator:
 - Note Taker: Empower attendees by asking for a volunteer to be a note taker, if no one steps up, assign one. Giving them an opportunity to increase their participation will make them more engaged in the meeting. This person will keep the meeting minutes. They must also record a list of topics that must be revisited because there was not enough time in the meeting to adequately address it. As the facilitator you are the driver of the meeting, not the note taker. You cannot do both at once and be a great facilitator.
 - Time Keeper: Request that a volunteer be time keeper to help the group stick to schedule. This person can alert the team when the allotted time is up for a segment of the agenda. You will discuss with the team whether to move on or stay on the topic.
 - Parking Lot Attendant: The Parking Lot Attendant keeps track of topics that surface that do not support the purpose or goals of this meeting. These topics should be targeted for future meetings.

- ▶ Guide the process of the meeting and not the content. The team will provide the content based on their approach to the discussion.
- ▶ Remain neutral at all times and avoid adding your personal ideas to the team discussion. Remember, their involvement is important since they are the ones working together on a routine basis. This experience is about them and not about you. Think of yourself as an enabling force to help the team get results.
- ▶ Protect the team against personal attacks on ideas and philosophies. Encourage productive discussions that value all ideas and suggestions. Set some meeting ground rules that include 'all ideas and questions are welcomed'.
- ▶ Maintain a balanced focus on both positive (successes or strengths) and negative (challenges or areas of disagreement).
- ▶ Ensure that everyone has an opportunity to participate and provide input. Everyone is different so expect a mixed level of participation. However, be aware of those who say nothing or those who want to contribute and are not being heard.
- ▶ Clarify and summarize what has been said throughout the meeting. Phrases like, 'Let's summarize what we've accomplished so far.'...or 'It sounds like everyone agrees on X, so let's move on and discuss Y.'
- ▶ Use questions and the agenda to keep the group on track. 'Are we all in agreement on that issue?'...'What does everyone think about that result?'...or, 'Is everyone ready to move on?'
- ▶ Close the meeting by recognizing progress and participation. Summarize all decisions made throughout the meeting. Be sure everyone is in agreement on actions and accountability associated with the team plan.
- ▶ Be sure to schedule a follow-up meeting with the team. The team can own this meeting going forward. However, it is essential that they have a 'next step' and a time set to measure progress against their action plan.

2. Preparation

Well run and effective meetings require a lot of planning and preparation. A typical meeting model is: 10% Planning; 80% Meeting; and 10% Follow-up. A much more effective model is 50% Planning; 20% Meeting; and 30% Follow-up. Use these checklists to help you effectively take action before, during and after your TDM processing meeting.

Preparation Checklist

Before the Meeting

- Reconfirm the time and location of the meeting
- Contact the team to Access a copy of their TDM results
- Distribute the meeting Agenda to all attendees
- Review the Agenda and TDM Report in detail
- Anticipate questions and/or challenges and plan your response
- Send a reminder to all attendees the morning of the meeting
- Print extra copies of the Agenda

During the Meeting

- Take note of all members present for reporting (Action Plan)
- Assign roles and responsibilities for note taking, time keeping, and parking lot
- Use the Agenda and TDM Report as leadership tools
- Encourage participation, active discussions and team decision-making
- Summarize accomplishments and results (Action Plan)
- Encourage focus on strengths (areas of agreement), differences (areas of greatest difference) and opportunities (areas of disagreement)
- Schedule a follow-up meeting and reinforce agreements for next steps – encourage team ownership beyond the TDM processing meeting
- Thank team members for their hard work and active participation

After the Meeting

- Complete your Facilitator Summary to support team tracking and success
- Attend the Facilitator Debrief session on January 4th at 11AM CST by dialing into 1-800-767-1750 - Access Code 28802#

3. Structure & Flow

Welcome

Roles & Responsibilities (5 Minutes)

- Facilitator
- Scribe
- Time Keeper
- Parking Lot Attendant

Meeting Goals (5 Minutes)

- Connect as a team to process TDM Results
- Discuss results and highlight top successes, differences and opportunities
- Pinpoint realistic priorities for action based on results
- Agree on action steps and measures to document a team plan for success

TDM Background (10 Minutes)

- Value - The TDM is designed to help teams evaluate stages of development and identify strategies for working together more effectively.
- Stages of Development

TDM Results (15 Minutes)

- Overall Reactions
- Surprises
- Validation

Top Strengths, Differences & Opportunities (15 Minutes)

- Strengths – Top areas of agreement
- Differences – Top areas of variation
- Opportunities – Top areas of disagreement

Action Planning: Goals for Team Development (30 Minutes)

- Top Three Realistic Goals for Development
- Small Tests of Change

Measuring Success (10 Minutes)

- Methods and Frequency

Next Steps (5 Minutes)

- Parking Lot Items
- Next Team Meeting

Language to Support Structure

In addition to the agenda, your choices of words are powerful to encourage team progress and keep things moving. Use these discussion skills to help you:

- ▶ **Structure Statements**—set expectations and establish goals and structure to the conversation by sharing an overview of the planned topics.
 - *“Our plan is to discuss A, B and then C...”*
- ▶ **Validating Questions**—reconfirm that you understood what the other person said and meant.
 - *“If I understand you correctly, you are saying.....”*
 - *“Just to be sure everyone is on the same page, are you saying....”*
- ▶ **Summary Statements**—identify what was accomplished at key points in a conversation.
 - *“Thanks for a great discussion on that. Now we've covered XYZ, accomplishing our goal for that topic today.”*
- ▶ **Transition Statements**—indicate that the conversation is finished and close on a positive note before moving on. These statements often follow a summary statement.
 - *“Let's move on to talk about XYZ as our next topic on the agenda today.”*
- ▶ **Statements of Closure**—indicate that the conversation is finished, highlight progress and results, and close on a positive note.
 - *“Thanks for your active participation and great progress...”*
 - *“Our next steps include...”*

The 4 P's

Another great approach to any meeting is to segment its flow using the 4 P's. They are:

- ▶ **Purpose**—begin with the end in mind by opening and closing the meeting with a main purpose. The purpose often includes a list of goals that define success. The purpose of this meeting is to:
 - Connect as a team to process TDM Results
 - Discuss results and highlight successes and opportunities
 - Pinpoint priorities for action by assessing areas with the greatest differences in perspective
 - Agree on realistic action steps and build a plan for success
- ▶ **People**—reinforce the importance of team and involvement leads to commitment. Encourage the team to identify primary team members or members of the core 'teamlet'.
 - *Who are our primary team members involved in every meeting?*
 - *Which people are rotating team members or individuals that have secondary levels of involvement on an 'as needed basis'?*
- ▶ **Process**—highlight the process for accomplishing the goals in this meeting using the agenda as a primary tool.
 - *"Our process for accomplishing our meeting goals is driven by our agenda. Let's review it in detail before we dive in and get started..."*
- ▶ **Progress**—set an expectation for how progress will be measured for today's meeting, and be sure that you reinforce how progress will be measure for action steps that are ongoing.
 - *"At the end of today's meeting our success will be measured by..."*
 - *"What small tests of change will you apply between now and the next meeting? How will you measure your success?"*
 - *"What will you do to be sure the team stays committed to the action plan and how will you measure your results?"*

4. Interactivity

How you start discussions, keep them going, and close them is very important to the learning experience.

- Be upbeat and positive to get people excited about the meeting.
- Emphasize the importance of sharing ideas by setting the expectation that the success of this meeting relies on active team discussion.
- Set a goal of getting at least three comments from the team when you lead a discussion by asking a question. Feel free to tell them that this is your goal so they know you will wait until you get some input.
- Establish 'ground rules' for this discussion and encourage the ongoing use of them to support team interactions. This is especially true if there is a lot of energy in the group and it's hard to make progress due to lots of talking. Here are some ideas for ground rules:
 - ✓ Everyone listen respectfully to each other (even if they disagree).
 - ✓ The person who is speaking should not be interrupted.
 - ✓ No more than one person should speak at the same time.
 - ✓ All ideas are welcome.
 - ✓ If you disagree with someone, disagree with their ideas, but don't attack the person.
 - ✓ Try to understand others as much as you hope they try to understand you.
 - ✓ Assume positive intent.
- Ask open ended questions to kick things off and engage the group. Keep it simple with broad questions for discussion such as:
 - ✓ *"What jumped out at you?"*
 - ✓ *"What does everyone agree that the team is doing well?"*
 - ✓ For items where there isn't agreement that the team is doing well, ask, *"What could we do to improve in this area?"* Note: TDM developers recommend beginning by working on the items where there is variation in responses. It's hard to begin on an item if everyone rates it poorly.

Keep the Discussion Going

Your job during the heart of the discussion is to keep things moving, keep the atmosphere respectful, and keep the group "on topic" in relation to the agenda.

- Encourage participation by thanking the team and recognizing key contributing. Say things like: "*Great discussion*" or "*Thanks for the great teamwork.*" This encouragement can be shown through words, positive facial expressions (i.e., smiling and nodding) and body language (i.e., facing the person talking and making eye contact).
- Use probing questions to expand discussion when appropriate.
 - ✓ *What do you think might account for the variation in team members' responses?*
 - ✓ *What are the things that we think are most important to work on?*
- Be patient and wait for responses if there is silence after you ask a question. Keep in mind that people need time to think. Wait at least 30 seconds before repeating or changing your question. This gives people time to think and shows them that you care more about their learning than about the speed of their responses.
- Write ideas on a flipchart (if available) to help people remember what was said and to show group progress. This is also a great tool to summarize the discussion and results.

Closing the Discussion

It is always a good idea to highlight the positive aspects of discussions and thank the team for their involvement. Guidelines for closing a discussion include:

- Summarize results by highlighting what the group accomplished and recapping agreements and action steps.
- Revisit unresolved issues or 'Parking Lot' items and ask the team to make a commitment regarding action and timing for each one.
- Ask the group for feedback. Check in with the team by asking them for their thoughts about how the meeting went.
 - ✓ What went well?
 - ✓ What was difficult, and why?
 - ✓ What practices will you adopt for future meetings?
- Thank the group for their active participation. Be sure to let people know that when they add something to the discussion it is more valuable for everyone.

Handling Common Challenges

Whenever we bring groups of people together for meetings, it's normal to experience some challenges. Here is a list of common challenges and recommendations to overcome them.

Challenge	Recommendations
Silence	<ul style="list-style-type: none"> ✓ Wait 15 Seconds – people will respond after a short period of silence (15 seconds feels a lot longer than it sounds). ✓ Say <i>"I'd like to get one idea from each of you."</i> – this sets a clear and fair expectation that everyone contribute. ✓ Explain that this is a time for discussion, and input is important. This sends a message that everyone's thoughts are valued. ✓ Share that this is a collaborative meeting and input is essential.
Out of Control Discussion	<ul style="list-style-type: none"> ✓ Recognize the Group – <i>"Great discussion everyone. Let's regroup and summarize where we are."</i> ✓ Use a Transition Statement – <i>"We have great energy today. Let's move on to our next topic."</i> ✓ Stick to the Agenda – <i>"This is important and we have a lot to say about it, but it's time to move on for now. Let's post it on the Parking Lot so you can come back to it at an appropriate time."</i>
High Levels of Emotion	<ul style="list-style-type: none"> ✓ Acknowledge the Emotion – <i>"I can tell that this is important to you."</i> ✓ Set a Time Limit – <i>"I can see that this is a hot topic for all of us. Let's take 5 minutes to process it, and if it's not something we can resolve today we'll come back to it at another time."</i> ✓ Value Perspectives (even negative ones) – <i>"That's one way of looking at it." "What does everyone else think about that?"</i>
Rigid or Inappropriate Responses	<ul style="list-style-type: none"> ✓ Open the Mind – <i>"That's one idea. Have you considered it in a different way? What others angles could you use to view it?"</i> ✓ Acknowledge all Comments – <i>"I'm glad you said something. I want to be sure that we're all on the same page. What you say that, are we understanding correctly that you mean...?"</i>

5. Action Planning

Each PACT team should consider their TDM scores and discuss the following toward goal setting.

Processing

1. *What are your overall reactions to the TDM results?*
2. *What surprised you about the results?*
3. *What did the results validate for you?*
4. *What areas are surfacing as the team's greatest strengths?*
5. *What areas are surfacing with a range of different responses?*
6. *What areas are surfacing as clear priorities for team development?*

Planning

1. *What vision do you have for your team in the next 3 months?*
2. *What 1-3 behaviors or goals would you like to work on or take action around in the next 30 days?*
3. *What strategies can you realistically agree to apply to make productive change? How will you measure your success?*
4. *What conversations need to take place within the team to achieve success relative to goals, strategies and measurement?*

Examples of Goals

<p>Trust/Honest</p> <p>Increase trust by immediately implementing the behavior of discussing issues and concerns directly with the person/people involved versus behind their back or with others team members.</p>
<p>Goal Definition</p> <p>Clearly define our 3-5 Primary goals for 2011 by December 31st, 2010.</p>
<p>Collaboration</p> <p>Increase meeting participation by setting a goal of everyone contributes at least one thought or idea during each meeting. Hold meetings on consistent days and times throughout 2011.</p>
<p>Decision Making</p> <p>Identify primary types of decisions and immediately begin sharing the 'why' behind decisions that are made without group input. Seek to discover the 'why' to help everyone understand.</p>
<p>Problem Solving</p> <p>Identify and implement a consistent model/process for analysis and problem solving by January 2011.</p>
<p>Role Clarity</p> <p>Clearly document all roles within the team and map how they intersect/cross when it comes to veteran care. Agree on how to handle the 'gray' areas and revisit the points of intersection to identify what's working and not working at least every other meeting.</p>
<p>Respect/Appreciation</p> <p>Listen to understand, do not interrupt and value everyone's comments without judgment.</p>
<p>Communication</p> <p>Define the frequency and methods of communication that are top priority for all team members by January 2011.</p>
<p>Conflict Resolution</p> <p>Discuss how to handle disagreement and conflict within the team. Appreciate differences, assume positive intent and learn from different perspectives.</p>
<p>Leadership</p> <p>Rotate team member responsibility for meeting facilitation every other month throughout 2011.</p>

Action Plan- Pact Team Name

Team Member	Job Title

Team Member	Job Title

Strengths (Areas of Agreement)

1.	2.	3.
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Differences (Variance in Responses)

1.	2.	3.
----	----	----

Opportunities (Areas of Disagreement)

1.	2.	3.
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Team Goal:	
Strategies for Action	Measurement
Team Goal:	
Strategies for Action	Measurement
Team Goal:	
Strategies for Action	Measurement

PACT TDM Meeting Summary

Facilitator Name:

Date of TDM Processing Meeting:

Name of the PACT Team:

Rating Scale					
1: Unsuccessful 2: Less than Successful 3: Successful 4: Very Successful 5: Top Performance					
How would you rate your overall level of the meeting results compared to your goals?	1	2	3	4	5
How successful were each of the following areas:					
Structure and Flow	1	2	3	4	5
Role of Facilitation	1	2	3	4	5
Preparation	1	2	3	4	5
Interactivity	1	2	3	4	5
Action Planning	1	2	3	4	5

Notes about your **general observations** associated with this team and the TDM Processing Experience?

What **recommendations** do you have for the team and/or future facilitators or team coaches working with this team?