SYSTEM PROBLEMS: A DIAGNOSTIC ACTIVITY

Goals

- To generate data about the functioning of an ongoing team.
- To diagnose the way in which the team approaches problem solving.

Group Size

All members of an ongoing team, assembled into two subgroups of approximately equal size.

Time Required

Approximately one hour.

Materials

- A copy of the System Problems Observation Form for each team member in the outer circle (see Process, step 2).
- A pencil for each team member.
- Blank paper for each team member in the inner circle (see Process, step 2).

Physical Setting

A room that will accommodate a group-on-group configuration, in which one subgroup is seated in a circle and another subgroup is seated in a circle around the first subgroup.

Process

1. Before the activity the facilitator selects an assertive team member and briefs him or her privately. The team member is told that his or her task is to watch for a signal from the facilitator and then to interrupt a discussion to inject a team problem in such a way as to require the team to deal with it. (For example, the member might express concern about low commitment or lack of team goals.) It is essential that this team member become committed to accomplishing this task. The facilitator and the team member agree on the signal to be given.

2. The facilitator divides the team into two subgroups and places the two subgroups in a group-on-group configuration. (The team member who is to interrupt the team’s task is a member of the inner circle.) Each team member in the outer circle is given a copy of the System Problems Observation Form and a pencil. While the outer-circle members are studying the form, the members in the inner circle receive pencils and...
blank paper with which they are to make notes to themselves about a topic that the team will discuss. (Suggested topics are motivation, leadership style, and rumors.)

3. The facilitator participates in the inner circle and initiates the discussion of the topic. After the team members in the inner circle have become involved in the interchange, the facilitator gives the signal for the assertive team member to begin diverting the interaction toward the previously agreed-on problem.

4. When the problem is resolved or an impasse has been reached, the facilitator terminates the discussion and explains the strategy that he or she and the assertive team member used as well as the purposes of the intervention.

5. The facilitator asks the outer circle for process observations. Then the entire team forms one circle to talk through the experience. It is important for the facilitator to elicit comments on any feelings that the team members have about being manipulated and to discuss with the team its approach to solving problems.

**Variations**

- The facilitator may assign each member of the inner circle a role to play or an attitude to assume during the experience or may direct each member to assume the role of another group member. For example, the facilitator could distribute role cards to each member with a brief instruction, such as “Be reticent,” “Act hostile,” “Concentrate on using listening and communication skills,” “Be argumentative,” or “Be warm and receptive to the ideas of others.”

- The facilitator may enlist the help of more than one team member in bringing up different system problems. In the processing phase, the behaviors of those who intervened with problems can be discussed in terms of their relative influence in diverting the task.
SYSTEM PROBLEMS OBSERVATION FORM

1. Problem Identification: How is the problem focused by the group? Who helps to define the issue?

2. Data Generation: How are points of view about the problem brought out? Whose opinions are not included in the discussion?

3. Data Processing: How are various positions discussed in relation to one another? Who is influential in exploring alternatives?

4. Decision Making: How is the problem resolved? Who influences the final decision?

5. Planning: How are “next steps” established? Who takes responsibility for follow-through?
PROJECT COLOSSUS: EXAMINING GROUP DYNAMICS

Goals

- To offer the team members an opportunity to explore the dynamics of status, power, and special knowledge in decision making.
- To offer the team members a chance to examine the effects of intrateam competition on team functioning.

Group Size

All members of an ongoing team.

Time Required

Approximately one hour.

Materials

- One copy of the Project Colossus Information Sheet for each team member.
- One copy of the Project Colossus File Sheet.
- A pencil for each team member.

Physical Setting

A room in which the team members can work without interruptions.

Process

1. The facilitator distributes copies of the Project Colossus Information Sheet and pencils and instructs the team members to read their information sheets before beginning the task of dividing the bonus money. (Five to ten minutes.)
2. The facilitator gives the copy of the Project Colossus File Sheet to one team member.
3. The process of decision making begins, and a time limit of twenty-five minutes is announced.
4. After twenty-five minutes the team members are told to stop working and are encouraged to share their reactions to the problem-solving experience. (Five to ten minutes.)
5. The facilitator leads a discussion of the entire activity by asking the questions on the following page.

- How did status or power in the team change for the person who had the “special knowledge” of the file sheet?
- How does possession of information help a person to achieve a position of leadership in a team’s problem-solving efforts?
- What leadership styles emerged among the team members?
- What factors increase competition among team members in this type of decision-making task? What factors decrease it?
- How can you use what you have learned to improve your team’s problem-solving efforts in the future?

**Variations**

- The facilitator may follow step 5 with a lecturette on the impact of various group dynamics on the process of team decision making. The lecturette content may include principles of functional and dysfunctional competition among team members.
- All team members may be informed of the exact amount to be distributed among the project members, thereby eliminating the special-knowledge dynamic in the decision making process.

Submitted by James V. Fee.
PROJECT COLOSSUS INFORMATION SHEET

The Problem

How is the bonus money for Project Colossus to be distributed among the team members?

The Background

You are all employed by the TT (Think Tank) Corporation, an organization that develops economically and socially feasible solutions to problems for various governmental units, other private-sector companies, and public-service organizations. A job called Project Colossus was assigned to your team. This was the first project your team worked on, and it is assumed that the team members will be reassigned to various projects in the future. This may be the only project that this particular team of TT employees will work on together. Some members of your team have worked on other TT projects and may have access to file copies of budget information and/or bonus-money allocations from past projects.

The Team Task

The purpose of this meeting is to determine an equitable way to divide a substantial bonus for Project Colossus. The exact amount of the bonus has not yet been announced, but it is rumored to be the same amount as previous project bonuses. Remember that all members of your team have contributed their abilities to the completion of the project. You will have some time to examine (individually) the following descriptions of “qualities” exhibited by some of the members of the team.

Everyone on your Project Colossus team, with the exception of five members, exhibited a high level of cohesiveness, work quality, conscientiousness, concern for the needs of the team, and attendance.

The following five people had a less-desirable record of performance:

1. Ms. X had some outside interests that caused her to miss two major team meetings—with good cause, she said. Her “cause” is that she edits and writes for a small local newspaper that is considered by many to be for special-interest pleading in the immediate community. The paper is in competition with the two syndicated newspapers in the area. Ms. X was a solid contributor to the major efforts of the project. Her intellect is well above average, as was indicated by her contributions.

2. Ms. Y was consistently late in arriving at team sessions. She was absent from only three major team sessions. She never offered any reason for either the tardiness or the absences. She is of average intellect. It must be kept in mind that this project is the first one she has experienced. She has had orientation training in the TT training division, but that is all.
3. Mr. A presents an interesting situation. He was chronically absent. He produced above-average work when the team divided into subgroups to complete various tasks. He seems to have a “sociable” life style, which he indicated was the reason for his frequent absences. It was said that he “moonlights” on other jobs in order to keep himself in the style to which he has become accustomed. He never confirmed or denied this rumor. No one doubts his ability to work, but it seems to be on his own terms and on his own time without regard for the team’s task needs. He has worked on one other TT project.

4. Mr. B represents a rather unfortunate case. He seemed to be at a complete loss in team sessions. He did have a record of illness and family commitments during his training period. He simply did not seem able to cope with the situation and had a considerable record of absenteeism. He has indicated to supervisors that he has family and personal problems but that they are only temporary. His intellectual capabilities were questioned by some of his coworkers. His training was relatively the same as that of all other “first timers.”

5. Mr. C also offers an interesting situation. He tried diligently to contribute to the team’s problem-solving efforts. He seems to possess an average intellect. He had only a few absences; he said they were because of family business that needed to be attended to. His attempts to help the team often hampered its progress, but he seemed to mean well. It would not be appropriate to say that he blocked others, but he seemed to have high authoritarian tendencies. He is a “second timer.”

**Instructions for Completing the Task**

Your team’s task is to find an equitable system for dividing the bonus monies for this project among the eighteen team members. Merit bonuses may be in order. Demerits also may be rendered. Your team will have approximately twenty-five minutes in which to reach a decision on the division of the monies.

When the team has reached a decision, complete the following chart accordingly.

<table>
<thead>
<tr>
<th>Name</th>
<th>Dollar Amount</th>
<th>Name</th>
<th>Dollar Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. A</td>
<td></td>
<td>Mr. J.</td>
<td></td>
</tr>
<tr>
<td>Mr. B</td>
<td></td>
<td>Mrs. P</td>
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</tr>
<tr>
<td>Mr. C</td>
<td></td>
<td>Ms. Q</td>
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</tr>
<tr>
<td>Mr. D</td>
<td></td>
<td>Ms. R</td>
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<tr>
<td>Mr. E</td>
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<td>Ms. S</td>
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<td>Mr. F</td>
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<td>Ms. T</td>
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<td>Mr. G</td>
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<td>Ms. X</td>
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</tr>
<tr>
<td>Mr. H</td>
<td></td>
<td>Ms. Y</td>
<td></td>
</tr>
<tr>
<td>Mr. I</td>
<td></td>
<td>Ms. Z</td>
<td></td>
</tr>
</tbody>
</table>
PROJECT COLOSSUS FILE SHEET

From past projects on which you have worked, you have information on the budget that is important to your team’s deliberation. This may give you “information status” and possibly one leadership function: focusing on what monies are available.

Budget Information

1. All eighteen members earn as base salaries between $25,000 and $35,000 annually, depending on the level at which they joined TT Corporation.
2. The total to be disbursed in bonus salary increases is $100,000.
3. An additional “slush” fund of $10,000 is available for meritorious contribution.
4. An average salary bonus per member would be $5,555 ($100,000 divided by 18).
BEAN BAGS: LEADERSHIP AND TEAM DEVELOPMENT

Goals
- To allow the team members to experience the effects of leadership behavior on the team.
- To demonstrate how changes in task, the addition/deletion of staff, and managerial style affect the development and performance of a team.

Group Size
All members of an ongoing team. The activity requires a minimum of seven members, five to perform the bean-bag task and two to serve as observers. If the team has more than seven members, the extras may serve as extra observers.

Time Required
One hour to one hour and fifteen minutes.

Materials
- A copy of the Bean Bags Observer Work Sheet for each observer.
- A copy of the Bean Bags Leader Instruction Sheet for the team member who becomes the leader (see step 5).
- A pencil for each observer.
- A clipboard or other portable writing surface for each observer.
- Three bean bags.
- Newsprint and a felt-tipped marker for the circle group and for the observer group (see step 9).
- Masking tape for posting newsprint.

Physical Setting
A room large enough to allow the team to form a circle without crowding and to allow the observers to observe comfortably.

Process
1. The facilitator introduces the activity without revealing its goals.
2. The team members are instructed to form a circle.
3. The facilitator solicits volunteers or designates two members to serve as observers and directs the observers to stand outside the circle so that they can observe the team’s activity. Each observer receives a copy of the Bean Bags Observer Work Sheet, a pencil, and a clipboard or other portable writing surface.

4. With the announced intention of establishing the team’s task patterns, the facilitator directs each member in the circle to raise one hand. The facilitator then tosses a bean bag to any one person in the circle and asks the recipient to lower his or her hand as the bean bag is caught. (All others in the circle are instructed to leave their hands raised.) The recipient is then directed to toss the bean bag to someone else in the circle. The person who catches the bag lowers his or her hand, tosses the bag to someone else, and so on until everyone in the circle has caught the bean bag and lowered his or her hand. (Two minutes.)

5. During steps 5 through 8, the observers monitor the activity of the team members in the circle and record their observations on their observer sheets. The facilitator announces that the last person to receive the bean bag is the circle’s leader. The leader receives a copy of the Bean Bags Leader Instruction Sheet and two additional bean bags and is directed to read the instruction sheet silently before proceeding. While the leader is reading, the remaining members in the circle discuss how they feel about the way in which the leader was selected. (Five minutes.)

6. The leader, following instructions, tells the members in the circle that the tossing activity has become the team’s task and that it will be practiced one more time to establish a pattern. The team members in the circle then complete one round of tossing. (Two minutes.)

7. After the team has completed a round of tossing under the leader’s direction, the leader announces that production is to be increased and directs the team members in the circle to complete the tossing task more quickly. Two or more rounds of tossing are completed at a stepped-up pace. (Five to eight minutes.)

8. After the team members have adapted to the increased pace, the leader presents changes to the task, as indicated on the instruction sheet. (Ten to fifteen minutes.)

9. The facilitator directs the observers to meet together in one area of the room and tells the circle members to meet together in a different area. The observer group is given a newsprint flip chart and a felt-tipped marker, and so is the circle group. The observers are directed to compare their observations and to prepare a report to be presented to the entire team. The members of the circle group are directed to discuss the activity among themselves and to prepare a team report focusing specifically on:

- How they felt (as individuals) during the activity;
- How they worked together as a group;
- How each of the changes introduced by the leader affected the group’s performance;
- How each of the changes affected their attitudes toward the leader;
- How the way in which their leader introduced the changes and organized them for work impacted the group; and
- What they would want to do differently the next time.

(Fifteen minutes.)

10. The entire team is reconvened, and the circle members present their report. (Five minutes.)

11. The observers present their report. (Five minutes.)

12. The facilitator leads the total group in a discussion of the activity, focusing specifically on:
   - Similarities in the two reports;
   - Generalizations that can be made from these findings; and
   - Possible applications of these insights to the team members’ work situations or to other situations in which they attempt to direct others at a task.

(Ten to fifteen minutes.)

**Variations**

- In step 5 the leader can be told to make four additional changes (without those changes being specified).
- The observers can be asked for feedback reports halfway through the activity.

Submitted by Derrick Suehs and Florence Rogers.
BEAN BAGS OBSERVER WORK SHEET

Instructions: Write down your observations of your team as it attempts to complete its task. Try to use specific examples of behavior.

1. How did the team respond when the leader was announced?

2. Was the team’s behavior different during the practice rounds from the way it was during the task rounds? How?

What happened in the team when:

3. The leader announced an increase in pace?

4. An additional bean bag was added to the task?
5. A person was removed from the team?

6. The final leader intervention was made (addition of third bean bag, change of tossing pattern, or change of members’ positions)?

7. What was the managerial style of the leader? How did he or she introduce and handle the changes? What was the impact on the team?

8. Describe the way in which the team members worked together.
BEAN BAGS LEADER INSTRUCTION SHEET

Do not show these instructions to anyone.

You have been selected to lead your team in completing its task of tossing bean bags. In order to fulfill your obligation as leader, follow these steps exactly:

1. Announce to your team that its task is to toss the bean bag in the manner previously established and that one more round of tossing will be completed as practice. Tell the team members that they will always continue the same pattern, that is, “Remember who tossed the bean bag to you and whom you then tossed it to; you will always receive it from and toss it to these same people.”

2. During the practice round of tossing, enforce the rule about keeping one’s hand raised until one receives the bean bag and then lowering the hand. This procedure indicates who has not yet received the bean bag.

3. After the practice round is completed, direct the group to carry out its task (complete another round of tossing).

4. Now announce that production is to be increased and that the team must “step up” its pace of tossing. Conduct two or more rounds of tossing with the team members attempting to complete the task more quickly. Once you have made your initial announcement, you can introduce the second round with a comment such as “Let’s see if we can get that at our new speed”; but do not continue to push the team to work even faster.

5. Continue to direct your team in the tossing activity while making the following changes:
   - Add one more bean bag to the tossing pattern (complete two rounds this way).
   - Remove one member from the team (one round).
   - Add a third bean bag to the tossing pattern or change the pattern of tossing or change the position of the members within the circle (your choice).
STICKY WICKETS: EXPLORING GROUP STRESS

Goals

- To develop team members’ awareness of factors that can lead to group stress.
- To allow the team members to experience some of these factors.
- To offer the team members an opportunity to share with one another their ideas for dealing with group stress.

Group Size

All members of an ongoing team.

Time Required

Approximately one and one-half hours.

Materials

- A copy of the Sticky Wickets Discussion Sheet for each team member.
- A copy of the Sticky Wickets Group-Stress Theory Sheet for each team member.
- One sheet of blank paper and a pencil for the team’s recorder.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting

A room that is slightly too small to accommodate the team’s work so that the members experience discomfort and distractions while completing their task. If the facilitator wishes, other environmental sources of stress may be added, such as loud music or an uncomfortable room temperature. A table and chairs are optional; omitting them may add to the experience of stress. However, if they are omitted, during step 2 the facilitator should provide the team’s recorder with a clipboard or other portable writing surface.

Process

1. The facilitator presents the task to be completed:
   “Your team is to prepare a report describing in detail all of the tasks that it performs. Start working now. No questions will be answered while you work on this report; you are expected to complete the task on your own.”
2. After five minutes the facilitator makes the following comment: “Only one member may write the team’s report. Decide now who that person is to be.” The team’s recorder is given one sheet of blank paper and a pencil.

3. After five more minutes the facilitator says, “The team’s report will be evaluated for neatness. If your report is not neat, you will be penalized.”

4. After three more minutes the facilitator comments as follows: “You have fifteen minutes left in which to complete your work. Remember that the team’s report will be evaluated.”
   
   As the team members work during the fifteen-minute period, the facilitator monitors their progress, occasionally commenting that the team is not doing as well as expected.

5. The facilitator calls time, collects the team’s report, gives each team member a copy of the Sticky Wickets Discussion Sheet, and leads the team members in a discussion of the questions on the sheet. (Thirty minutes.)

6. Each team member is given a copy of the Sticky Wickets Group-Stress Theory Sheet and is asked to read this handout. (Ten minutes.)

7. The facilitator leads a discussion in which the contents of the theory sheet are related to the activity just completed. The following questions are asked:
   - How would you characterize the level of demands associated with this task? the level of constraints? the level of support?
   - How does what happened in your team compare with the consequences identified by Payne?
   - Which group-member psychological state is most characteristic of your team: deterioration, destruction, or development?
   - What steps can your team take to deal more effectively with the sources of stress it encounters? Which sources of stress can be changed?
   - What will your changes accomplish?

**Variations**

- After step 7 the team members may be asked to restructure the task to reduce the number and/or level of stress sources.

- The task to be completed may be changed to reflect the composition of the team. For example, when conducting the activity with an ongoing managerial group, the facilitator may ask the group to develop a new set of criteria and procedures for awarding promotions and salary increases.
Various factors cited in the theory sheet may be altered during task assignment and completion; for example, support may be provided, or the task difficulty may be increased or decreased.

Submitted by William B. Kline and Joseph J. Blase.
STICKY WICKETS DISCUSSION SHEET

1. While your team was working on its report, how did you feel toward the facilitator?

2. How did you feel toward your fellow team members?

3. How did you feel about yourself?

4. How did the nature of the task itself and the way in which it was presented to you affect the preparation of the report?

5. What factors hindered your team in preparing its report?

6. What factors helped? In what ways were they helpful?

7. How consistent are your feelings about this task with those that you commonly experience as a member of this team? How common are the helping and hindering factors to your team?
STICKY WICKETS GROUP-STRESS THEORY SHEET

Literature in the field of stress management describes such topics as understanding sources of stress; individual responses to stress; cognitive coping strategies; diet; exercise; and such innovative approaches as meditation, hypnosis, and biofeedback. A survey of the stress literature demonstrates that the focus of the majority of investigations into the subject has been on how individuals can more effectively cope with stress.

An important aspect of stress that is often neglected is the consideration of how various factors create stress for a group. Payne (1981) devised a model that depicts the phenomenon of task-group stress. This model is based on the notion that group process, environmental pressures, and the psychological states of members can result in destructive levels of group-experienced stress.

In the context of this model, “work” groups are those that have as their purpose the completing of specific tasks, such as producing products or making difficult decisions. The factors that determine a work group’s experienced level of stress are demands, constraints, and support.

Demands

High levels of demands are likely to produce stress in a work group. Externally imposed demands related to the completion of tasks may include high degrees of task difficulty, high quality and/or quantity standards, and real or expected penalties for failing to meet these standards. Payne describes demands generated within the work group itself: the group’s own standards for performance and rigid sanctions for “letting the group down” (for example, social isolation, blame, and so forth). Thus, a work group is likely to experience stress if it is subject to external demands, such as high quality and quantity standards, and internal demands, such as high performance and total commitment to the group’s project.

Constraints

Constraints, the second factor presented by Payne, are defined as conditions that make it difficult or impossible for the work group to meet the demands placed on it. Social constraints are the outcome of behavioral, emotional, or cognitive factors operating on or in the work group. Behavioral facts that serve as constraints are normative standards such as rules, regulations, or other, more informal standards of behavior. For example, a work group may experience a behavioral constraint imposed by the organizational norm of not questioning authority. Emotional factors that constrain are the result of norms that govern the types of emotional expression considered appropriate. Should the expression of feelings of overwork, inadequacy, anxiety, or anger be regarded as inappropriate, it is likely that the group members’ unexpressed feelings will contribute significantly to the

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intensity of stress experienced in the group. Cognitive factors that can constrain a work group are the beliefs that group members hold about the group. These beliefs may be that the group leader is ineffective, the group is incompetent, or successful task completion is impossible.

Physical or material constraints exist when a group works in surroundings that hinder its task completion, such as inadequate office space, or when a group has deficient or inadequate materials with which to complete its tasks, such as a parts shortage. Time also can be a significant constraint; insufficient time to complete even routine tasks can create substantial stress in a work group.

Support
Support is the final factor presented by Payne. A low level of support can cause stress in a work group. Support may include advice and consultation provided by superiors and colleagues, discussions among peers regarding feelings and frustrations, and steps taken by an organization to revise its regulations and procedures or to provide additional training.

Consequences of Work-Group Stress
Payne states that the group-stress variables interact to produce three classes of group-member psychological states: deterioration, destruction, and development. Low demands coupled with low levels of support and heavy constraints result in deterioration. For example, group members who perform repetitive, intellectually undemanding tasks under heavy or light behavioral constraints and with little or no support from one another may become apathetic or depressed. For people experiencing deterioration, work loses meaning and becomes a monotonous activity.

In situations in which demands are high, support is low, and constraints are either heavy or light, workers are likely to experience physically or psychologically destructive outcomes. Workers who function under high demands for quality and productivity and have little or no support in the work environment to assist in task completion, regardless of the constraints present, are likely to experience adverse psychological reactions such as burnout and/or physical reactions such as ulcers.

On the other hand, low or high demands, high levels of support, and light constraints produce a psychological state that leads to development. Work-group members who enjoy a high level of support from their families and one another and who face few constraining forces in their work environment are likely to be productive and to enjoy their work regardless of the level of demands imposed.

REFERENCE
CHIPS: AGENDA BUILDING

Goals

- To select agenda items (for an upcoming team-building session) that have the highest value to the team members.
- To promote the team members’ awareness of one another’s agenda items and the degree of commitment to those items.
- To promote synergy in the team by means of negotiation.

Group Size

All members of an ongoing team.

Time Required

One and one-half to two hours, plus prework (step 1).

Materials

- A copy of the Chips Rules Sheet for each team member.
- For each team member, an envelope containing a set of four poker chips: one white, one red, and two blue.
- A newsprint poster depicting chip values and bonus points (prepared in advance by the facilitator):

<table>
<thead>
<tr>
<th>Chip</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>3 points</td>
</tr>
<tr>
<td>Red</td>
<td>2 points</td>
</tr>
<tr>
<td>Blue</td>
<td>1 point</td>
</tr>
</tbody>
</table>

  Bonus for all of the same color:

  = + 5 points

- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A room in which the team members can confer comfortably. The room should include a table on which to place the master list of agenda items so that the team members can put poker chips next to the items they wish to vote for (see steps 3 and 4).
Process

1. Prior to the date of the team’s agenda-building meeting, the facilitator meets with the team members, either individually or together, and instructs each member to make a list of the items that he or she would personally like to see included on the agenda for an upcoming team-building session. The team members are asked to bring their lists of suggested agenda items to the agenda-building meeting.

2. At the beginning of the agenda-building meeting, the facilitator explains the purpose of this step in the activity. The facilitator says that in order for the most essential items to be addressed during the time allotted for the team-building session, the agenda will be limited to those items chosen as a result of the agenda-building activity that the team members are about to complete.

3. The team members create a master list of potential agenda items by reading aloud the lists they brought with them. The facilitator records all items on newsprint, leaving plenty of space between items. (Twenty minutes.)

4. The facilitator places the master list on a table where all team members can see it and tells the team members that they will be voting on the items listed.

5. The facilitator gives each team member a copy of the Chips Rules Sheet and an envelope containing poker chips. The facilitator posts the newsprint poster depicting chip values and bonus points; explains the procedure, the rules, and the scoring; answers any questions; and reiterates the mathematical advantage of bonus points. After reminding the team members that negotiating and lobbying are desirable and “fair,” the facilitator announces the beginning of the twenty-minute discussion and voting period. The facilitator does not participate in the negotiating or voting processes.

6. When the voting process has gone on for fifteen minutes, the facilitator gives a five-minute warning. After five more minutes, the facilitator calls time and closes the voting.

7. The chips next to each item are tallied; bonus points are awarded; and a final tally is made for all agenda items. The facilitator makes a new list of agenda items on newsprint, with the items receiving the highest scores at the top of the list, and posts this new list prominently. (Ten minutes.)

8. The facilitator tells the team that the list will be presented to the team leader in time for the team’s top agenda items to be incorporated into the final agenda for the team-building session.

9. The facilitator elicits comments on the team members’ feelings about the experience as well as their perceptions of the effectiveness of the listing and voting procedure. (Fifteen minutes.)

10. The facilitator asks the following questions:
What insight did you gain about the agenda items favored by other members of your team?

What insight did you gain about the intensity of your fellow team members’ commitment to the items they favored?

What other team dynamics emerged during this process?

(Fifteen minutes.)

11. The team members suggest ways in which the agenda-building process might be improved and discuss their preferences for procedures to follow in establishing agenda items for future team-building sessions.

Variations

If the team leader has a predetermined list of agenda items, this activity can be used to provide the team members with an opportunity to add a limited number of items to the total agenda. The leader should not disclose the predetermined items prior to completion of the activity.

A nonparticipating observer may be asked to report on the negotiating and decision-making processes employed by the team.

Bonus points may be altered to promote more negotiation or may be eliminated.

The poker chips may be eliminated. Instead, each team member may be allotted a fixed number of points to “spend” on the agenda items.

Submitted by Charles A. Hill, Jr., and Edward L. Emerson.
CHIPS RULES SHEET

1. You may place only one chip beside any one agenda item.
2. The items having the highest total point values will comprise the final list of agenda issues.
3. You are free to change your chip placements at any time until you hear the announcement ending the voting period.
4. Only the owner of a chip may change its placement. Separate agenda items may be modified, discarded, or merged into one item, but not simply coupled, compounded, or linked.
5. Ties must be broken; this can be done by any process acceptable to the team members.
6. You must use all of your chips.
7. Lobbying and negotiating are fair and desirable, as is anything else not specifically prohibited by these rules. There are no tricks or hidden rules.
INSTANT SURVEY:
CREATING AGENDA FOR TEAM BUILDING

Goals

- To generate working agenda for a meeting in which the team members will discuss their concerns about team issues that will face them in the future.
- To determine in a nonthreatening way the hidden needs and concerns of the team members.
- To present for discussion the concerns of all the team members.
- To provide the team members with a method for creating member-owned, meaningful agenda that will assist the facilitator in designing a team-building session for the team.

Group Size

All members of an ongoing team assembled into trios.

Time Required

One hour and forty-five minutes to two hours.

Materials

- One 3" x 5" index card for each team member.
- One 5" x 8" index card for each team member.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker for each subgroup.
- A newsprint flip chart and a felt-tipped marker for the facilitator’s use.
- Masking tape for posting newsprint.

Physical Setting

A room that is large enough so that the trios can work without disturbing one another.

Process

1. The facilitator announces the goals of the activity and explains that teams often fail to discuss the private needs and concerns of their members. The facilitator also explains that hidden agenda can interfere with productivity and a positive team climate.
2. Each team member is given one 3” x 5” index card, one 5” x 8” index card, and a pencil.

3. The team members are asked to think of the personal challenges they face as individual members of the team and to focus on their individual abilities to meet those challenges. Each team member is asked to silently identify one change in his or her abilities or characteristics that would enhance the effectiveness of the team. Focusing on that change, the team member is instructed to express the need for the change by writing a sentence starting with “I need” on the 3” x 5” card.

4. The team members are asked to think of the challenges their team faces in performing its functions. Each team member is asked to silently identify one change in the team’s characteristics that is needed to enhance the effectiveness of the team’s work. Focusing on that one need, the team member is instructed to express it by writing a sentence starting with “We need” on the 5” x 8” card.

5. The facilitator randomly divides the team members into trios and identifies each trio by a number.

6. Each trio places all its cards (both small and large) in one stack and writes the trio’s number on the top card. Each trio trades its stack of cards for another trio’s stack.

7. Each trio is given a newsprint flip chart and a felt-tipped marker and is instructed to review the cards, discuss them, prioritize them, and plan a report on the findings. The facilitator asks the trio members not to deal with their own concerns but to consider only the concerns written on the cards. Each trio selects one member to report the findings, and the facilitator encourages the trios to use the newsprint flip charts in their discussions. (Forty-five minutes.)

8. The total team is reassembled, and the representatives of the trios take turns reporting their findings. The facilitator summarizes the reports on newsprint and posts the newsprint. (Fifteen minutes.)

9. The facilitator leads a discussion about the findings, and the team members are asked to identify the patterns that emerged. (Fifteen minutes.)

10. The facilitator suggests that these needs become the agenda for an upcoming team-building session and leads a discussion on the following questions:

    - How would you prioritize these agenda for your team-building session?
    - What items need to be added?
    - What problems do you anticipate in a team-building session based on these agenda? How might you deal with these problems?

Variations

- This activity may be used as an introduction to a team-building session, followed with a focus on the specific issues identified in the agenda.
If time is limited, the team members may make up only one type of card: either “I need” or “We need.”

If the team is very small, the facilitator may divide the team members into pairs instead of trios.
MEETINGS AUDIT: PLANNING FOR IMPROVEMENT

Goals

- To practice team planning and problem solving.
- To provide an opportunity for the team members to give and receive feedback about their meetings.
- To generate commitment to specific suggestions for improving team meetings.

Group Size

All members of an ongoing team.

Time Required

Two hours.

Materials

- A copy of the Meetings Audit Satisfactions Work Sheet for each team member.
- A copy of the Meetings Audit Dissatisfactions Work Sheet for each team member.
- A copy of the Meetings Audit Suggestions Work Sheet for each team member.
- A pencil for each team member.
- Newsprint and a felt-tipped marker.
- Masking tape.

Physical Setting

Chairs and a table or other writing surfaces.

Process

1. The facilitator briefly introduces the activity and discusses its goals. Then the facilitator briefly describes the process and says that because there is a limit to the number of suggestions that can be considered during this planning session, the team members will select those items on which the members feel they most need to work. (Three to five minutes.)

2. The facilitator distributes to each team member a copy of the Meetings Audit Satisfactions Work Sheet, a copy of the Meetings Audit Dissatisfactions Work Sheet, a copy of the Meetings Audit Suggestions Work Sheet, and a pencil. The
facilitator reads the instructions on each work sheet, answers any questions, and tells the team members that their work sheets will be collected later and read to the team but that the sources of the work-sheet comments will not be revealed. The facilitator then directs the team members to complete all three work sheets. (Ten minutes.)

3. The facilitator collects the work sheets and reassembles the total team. The facilitator reads each comment from the work sheets aloud, records the key phrases from the comments on newsprint, and places a star next to the most commonly identified items. (Fifteen minutes.)

4. The team members are invited to share brief reactions to the list. (Five minutes.)

5. The facilitator reads aloud the comments from the Meetings Audit Dissatisfactions Work Sheets, lists key phrases, and notes the most frequently cited items. The team members briefly share their reactions to the list. (Fifteen minutes.)

6. The facilitator reads aloud the comments from the Meetings Audit Suggestions Work Sheets, records the key phrases on newsprint, and records the amount of importance attached by the respondents to each of the suggestions. (Fifteen minutes.)

7. The team members are assembled into pairs, and each pair is given a sheet of newsprint and a felt-tipped marker. (If there is an uneven number of team members, one trio may be assembled.) The completed Meetings Audit Suggestions Work Sheets are distributed evenly among the pairs. The partners are told to review all the suggestions assigned to their team, to consider the importance attached to each of the suggestions by the respondents, and to identify the suggestions that they agree have the highest utility for the team. Each pair’s selections then are prioritized and posted on newsprint. (Twenty minutes.)

8. The total team is reconvened. Each pair, in turn, reports on its prioritized list of suggestions for improving the meetings. (Ten minutes.)

9. The facilitator leads a discussion to clarify the posted suggestions and then focuses on the items given the highest priority. An attempt is made to reach agreement on and commitment to the suggestions that the team members wish to implement at this time. (Fifteen minutes.)

10. The persons responsible for implementing each chosen suggestion are identified, and the team members agree on a date on which to review the degree of accomplishment and evaluate the results of the attempts that have been made to improve their meetings. (Five minutes.)

11. Suggestions for improvement that are not to be implemented at this time or on which there was no agreement or commitment are carried over for review by the total team at another time.
Variations

- Patterns of team behavior, efficiency, or aspects of the team’s meetings other than satisfactions and dissatisfactions can be measured and discussed.

- After step 7, each pair can exchange its list of priorities with another pair and discuss the lists before the total team reconvenes.

- Each pair can be directed to develop an action plan for implementing one selected suggestion. These action plans are then presented to the total team. Any modifications in the plans are made by the total team, and consensus is sought.

- Team members can suggest how this process could be used effectively in other areas of their organization.
MEETINGS AUDIT SATISFACTIONS WORK SHEET

With what aspects of the team’s meetings are you generally satisfied? (What do you like about the meetings?) Try to be specific.

1.

2.

3.

Considering each of these items separately, how would you rate the degree of satisfaction you feel for each of them on a scale of one to six?

Item 1:
A great deal of satisfaction

6  5  4  3  2  1
Relatively little satisfaction

Item 2:
A great deal of satisfaction

6  5  4  3  2  1
Relatively little satisfaction

Item 3:
A great deal of satisfaction

6  5  4  3  2  1
Relatively little satisfaction
MEETINGS AUDIT DISSATISFACTIONS WORK SHEET

With what aspects of the team’s meetings are you generally dissatisfied? (What do you dislike about the meetings?) Try to be specific.

1. 

2. 

3. 

Considering the three dissatisfactions you have listed, how would you rate the degree of dissatisfaction you feel for each of these items?

**Item 1:**
A great deal of dissatisfaction
6  5  4  3  2  1 Relatively little dissatisfaction

**Item 2:**
A great deal of dissatisfaction
6  5  4  3  2  1 Relatively little dissatisfaction

**Item 3:**
A great deal of dissatisfaction
6  5  4  3  2  1 Relatively little dissatisfaction
MEETINGS AUDIT SUGGESTIONS WORK SHEET

What suggestions can you offer for ways in which the team’s meetings can be improved or made more efficient or more satisfying to you? Be specific; state exactly who needs to do what in order for your suggestions to work.

1. 

2. 

3. 

How important do you think each of these suggestions is for the team to attempt to implement at this time?

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<th>6</th>
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<th>4</th>
<th>3</th>
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TEAM IDENTITY: A DEVELOPMENTAL PLANNING SESSION

Goals
- To provide the team members with a model for understanding the factors that influence group development.
- To enable the members to identify the team’s current stage of growth.
- To promote team cohesiveness by exploring the team members’ needs and interests.

Group Size
All members of an ongoing team.

Time Required
Approximately two hours.

Materials
- A copy of the Team Identity Phases of Group Growth Sheet for each team member.
- A copy of the Team Identity Work Sheet for each member.
- A pencil for each member.
- Newsprint and several felt-tipped markers in different colors.
- Masking tape for posting newsprint.

Physical Setting
A room large enough so that the team members can be seated in a circle on the floor or around a circular table.

Process
1. The facilitator gives each team member a copy of the Team Identity Phases of Group Growth Sheet and presents a lecturette on the model. (Ten minutes.)
2. The facilitator discusses the goals of the activity and outlines the remaining steps. (Five minutes.)
3. The facilitator distributes copies of the Team Identity Work Sheet and pencils and instructs the team members to complete their work sheets. (Five to ten minutes.)
4. The team members share and clarify their written responses. (Fifteen to twenty minutes.)
5. The facilitator instructs the team to use newsprint and felt-tipped markers to develop a team-identity poster that serves as a descriptive statement reflecting the predominant individual and team needs as well as the team’s purpose (in terms of task). (Thirty minutes.)

6. The facilitator instructs the team members to reflect on their poster and on the model of group development presented earlier and to determine which phase of development their team is in at this point. (Ten minutes.)

7. The facilitator leads the team in a discussion of strategies for achieving Phase IV of group growth (a balance among individual, group, and task needs). As strategies are presented, they are recorded on newsprint. (Fifteen to twenty minutes.)

8. The facilitator elicits comments about the experience and briefly summarizes what has been learned, emphasizing general themes and applications of the concepts presented. A volunteer team member is asked to retain the strategies recorded in the previous step so that the team can review them at a later date.

**Variations**

- Designate recorder to post key words and ideas during step 4. This list then serves as a guideline for developing the statement of group identity in step 5.
- The activity may be used as an intermittent processing activity to help the team to review its processes.

Submitted by Kenneth W. Howard.
During every group interaction three types of needs are present: individual needs, group needs, and task needs. The length of time spent on each type of need depends on many variables, a major one being the group’s current phase of development.

**I** (Personal Needs): Becoming oriented to the group, finding out whether one’s personal needs will be met

**WE** (Group Needs): Developing useful membership roles, ground rules, procedures, and group structures as needs emerge

**IT** (Group Task): Focusing on the agreed-on objective(s)

The following diagram depicts different stages in the evolution of a group:

*Relative length of time spent on each type of need (by phase):*

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TEAM IDENTITY WORK SHEET

Instructions: Complete the following statements individually.

1. My personal needs as they relate to being a member of this team are:

2. My perceptions of the needs that we share as members of this team are:

3. The primary purpose for this team’s existence is:

4. Our task as a team is to:
TEAM DEVELOPMENT: A TORI MODEL

Goals

- To study TORI growth processes.
- To practice applying a theoretical model to team self-diagnosis.

Group Size

All members of an ongoing team.

Time Required

Approximately two and one-half hours.

Materials

- Blank paper and a pencil for each team member.
- Newsprint, felt-tipped markers, and masking tape.

Physical Setting

A room in which the team members can work in pairs without disturbing one another.

Process

1. The facilitator announces the goals of the experience and summarizes the process. He or she tells the team members that they will study the TORI model by examining its individual parts and then putting them together in the context of task-group functioning.

2. The facilitator divides the team into pairs, distributes paper and pencils, and announces that the team will create a model of an ideal task group with regard to one of the four TORI growth processes: trust, openness, realization, and interdependence. The facilitator then assigns one dimension to each pair. (If there are fewer than eight team members, one or more of the pairs must be assigned more than one TORI process; if there are more than eight members, one or more trios may be formed.) The facilitator instructs the pairs that they will each give a five-minute presentation of their model to the rest of the members. The pairs are encouraged to be creative in developing their presentations and are told that they may use role play, simulation, or any media or props that will effectively communicate their model.

3. The facilitator briefly explains the four concepts of TORI and lists them on newsprint so that the members can refer to them later. A brief summary of the four TORI factors is as follows:
- **Trust**: interpersonal confidence and absence of fear;
- **Openness**: free flow of information, ideas, perceptions, and feelings;
- **Realization**: self-determination, being role free, doing what you want to do; and
- **Interdependence**: reciprocal influence, shared responsibility, and leadership.

4. The pairs formulate their models and prepare their presentations. (Thirty minutes.)

5. The facilitator instructs each pair to diagnose the way it functioned in terms of its assigned TORI dimension and to prepare to report on this diagnosis. (Ten minutes.)

6. Each pair is called on to present its model and to report on the pair’s functioning in terms of the model. (Five minutes each.)

7. When all presentations have been made, the facilitator directs the team members to discuss the integration of the four TORI concepts with a task group and to formulate three or four statements (generalizations) that depict the interrelationships between the four dimensions of the TORI model. (Twenty minutes.)

8. The facilitator leads the team in a discussion of the TORI model.

**Variations**

- Other models of human interaction may be used.
- If the team is large enough, individual team members may be assigned to the pairs to serve as process consultants.
- Each pair may select the particular TORI dimension it will explore.

Submitted by Gary R. Gemmill.
TOP SECRET CONTRACT: GROUP DYNAMICS AND TASK ACCOMPLISHMENT

Goals

- To provide a developing or ongoing team with an experience in the use of newly acquired skills in leadership style, problem solving, decision making, and communication processes.
- To study group dynamics in a task situation: competition/collaboration, negotiation, confrontation/avoidance, etc.
- To point out the effect that external influences (outside agents, competition built into the system, production requirements, time and other constraints, etc.) have on team task accomplishment and on individual team members.

Group Size

All members of a developing or ongoing team. This design requires nine team members, seven to complete the task and two to serve as observers. (If there are more than nine team members, the facilitator should divide the total number of team members over seven into two approximately equal groups, giving one group copies of Observer Sheet 1 and the other group copies of Observer Sheet 2.)

Time Required

Approximately two and one-half hours.

Materials

- One LEGO® model kit #455 (Lear Jet). The building materials only are distributed; team members are not to see the box or folders that come with each kit. (Instead of using the model described, the facilitator can use other LEGO® bricks and develop a prototype model and model blueprint from the components available.)
- Two complete Top Secret Contract prototype models: one to be broken into components for assembly and the other to be used as the government standard.
- A copy of the Top Secret Contract Team Instruction Sheet for each team member.
- A copy of the Top Secret Contract Observer Sheet 1 for one of the observers and a copy of the Top Secret Contract Observer Sheet 2 for the other observer.
- A copy of the Top Secret Contract Director’s Instruction Sheet and a copy of the Top Secret Contract Blueprint for the team director.
- A newsprint flip chart and felt-tipped markers.
Blank paper and a pencil for each team member.

**Physical Setting**

A large room with a table and chairs for the team members who are designated as workers. In addition, simulated offices (each with a desk or table and a chair), separate from the workers’ area, should be set up for the director, the production manager, the materials manager, and the government representative. (Distance is used to separate the “offices.”) Chairs also should be provided for the observers.

**Process**

1. The facilitator tells the team members that they will be producing a prototype model for a secret government contract. He or she distributes a Top Secret Contract Team Instruction Sheet to each team member and goes over the contents. It is recommended that newsprint be used to illustrate the organizational structure.

2. The facilitator asks the team to select seven people to work on the task and two (or more) to serve as observers, clarifying that the observers are to be sent to him or her for briefing. The facilitator further stipulates that while he or she is briefing the observers, the rest of the team is to designate a director, a materials manager, and a production manager. The remaining team members will be the workers.

3. The facilitator meets with the observers, instructing one to observe the director and managers and the other to observe the workers. He or she gives the appropriate observer sheets to the observers and explains the sheets to them. He or she also shows the model components and the completed Top Secret Contract prototype to the observers and tells them of any production and assembly problems. (Fifteen minutes.)

4. The facilitator then meets with the chosen director and gives him or her a copy of the director’s instruction sheet and a Top Secret Contract Blueprint. The facilitator does not give the director instructions or clues for organizing the team.

5. The facilitator gives the materials manager the set of LEGO® building components needed for the team to construct the model. The materials manager also receives pencils and paper to be distributed to team members for their own use.

6. The facilitator tells the team members that they have an hour to complete the task and gives the signal to begin.

7. While the team is carrying out its task, the facilitator acts as the government representative, seeing that secrecy regulations are enforced, receiving reports from the director, etc.

8. At the end of one hour, the facilitator calls time and instructs the team to produce its model. The facilitator checks the model against the Top Secret Contract Blueprint.
specifications to see whether it matches; if it does, he or she “awards a contract” to the team.

9. The facilitator asks the observers to give their reports.

10. The facilitator processes the activity with the team, focusing on the following elements:
    - What member participation was most helpful in the team’s accomplishment of the task?
    - What behavior seemed to hinder the team’s efforts?
    - What feelings did members experience during the activity? What evoked these feelings?
    - What roles evolved as the team worked at its task?
    - What learnings can be gained from this experience, especially in terms of group interaction, leadership styles, problem-solving strategies, inter- and intragroup communication, competition versus collaboration, etc.?
    - How can these learnings be applied to real-life situations?

**Variations**

- The workers can be instructed to appoint one of their members to act as a union steward.

- The government representative can create or increase stress by delaying requests for communications, sending a government inspector into an organization, shutting the company down if its report is late, etc.

Submitted by Robert W. Landies and Tom Isgar.
TOP SECRET CONTRACT TEAM INSTRUCTION SHEET

1. You are members of a team that is under contract to the government to develop an experimental model. If your model matches the government specifications, your team will get a long-term contract.

2. Because of a security requirement, at this time only your director knows what the end product is to be.

3. The organization of your team will consist of three levels as follows:
   - A director;
   - A materials manager and a production manager; and
   - The workers.

4. The workers are unionized.

5. Each of the designated workers will be engaged in building a component of the end product. Each will have a model component to work from. No worker may touch the prototype component.

6. When all components are completed, you as a team will assemble the total model, and at that time you will see the prototype.

7. The workers report directly to the production manager, who will assign each one to a work station.

8. The workers go directly to the materials manager to obtain their parts.

9. You will be given one hour to complete your team assembly. You may use that time in any way you choose.

10. Assembly deficiencies, failure to follow the model configuration, and failure to complete the total model within the allotted time will jeopardize your team’s chances of receiving a contract.

11. Your first task is to form your organization. You have fifteen minutes. Choose two (or more) observers and send them to the facilitator for briefing. Then complete your organization.
TOP SECRET CONTRACT OBSERVER SHEET 1

You are to observe the director and the managers:

1. Observe their decision-making and/or problem-solving processes.
   - What steps did they go through and how effectively?
   - Were any steps left out? If so, what was the effect?
2. What, if any, behavioral contracts did they make?
3. How did they propose to deal with group-maintenance issues?
4. How did they handle or cope with functional or role problems of an interpersonal nature (conflict, competition, etc.)?
5. How effective was the leadership?
6. What, if any, alternatives did they develop?

You may use additional questions as appropriate.
TOP SECRET CONTRACT OBSERVER SHEET 2

You are to observe the workers:

1. How did the workers approach their task? Did they define it? How?
2. Did they agree to any mutually collaborative or supportive activity? Did they engage in any?
3. Did they engage in any competitive behavior? If so, what was the effect?
4. How did they interact with the managers? Did the relationships create conditions in which confrontation took place or, in your judgment, should have taken place? How was it dealt with?
5. How were they involved in decision making by the managers? If they were not, what was the effect?
6. What alternatives were developed within the problem-solving situation, both functionally and interpersonally?
7. What part did previous learnings play in problem solving?
8. How effective was their communication process? Did it help or hinder?
9. How will you describe this group in your feedback observations?
10. Did they select a union representative? What criterion was used? What did you observe about their process?
11. What were the critical dynamics that you observed?
TOP SECRET CONTRACT DIRECTOR’S INSTRUCTION SHEET

1. You will work primarily with your staff; however, you may interact with others as you deem necessary.

2. You will indicate to your managers that success on this project is very important to you, that your pending promotion depends on it.

3. You will review their functional roles with them, indicating that their performance on this task could well influence you to recommend one of them to fill your job.

4. You will tell your materials manager that his or her control of the red blocks is critical. They are a scarce material in short supply.

5. You will instruct your production manager that time is of the absolute essence and that you will be allowed to show him or her the prototype and the Top Secret Contract Blueprint within the next hour. At some time after the workers are started on their task, show the production manager both the model and the blueprint but stipulate that he or she cannot discuss them with the workers until the team is ready to assemble the components.

6. Instruct both managers that you will be asking them for a recommendation for promotion of one of the workers based on the workers’ performance on this project.

7. Initially you will meet with only your two staff members to discuss the above information. After construction has begun, you are permitted to communicate directly with the workers.

8. The facilitator will function as the government representative for this project.

9. The government representative will check the team’s completed model against the government specifications to see whether it matches; if it does, he or she will award the contract to your team.

10. You will submit status reports to the government representative on the half hour. Failure to comply can result in the temporary shutdown of your operation.

11. The government representative will have access to your facilities to ensure compliance with secrecy regulations.
TOP SECRET CONTRACT BLUEPRINT

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SLOGANS: A TEAM-DEVELOPMENT ACTIVITY

Goals

- To experience the processes and feelings that arise when a new member joins an ongoing team with defined tasks and roles.
- To explore the coping mechanisms adopted by the individual and the team to deal with entry problems.
- To examine functional and dysfunctional coping strategies of teams.

Group Size

All members of an ongoing team. This activity is best used with a team consisting of ten to twelve members.

Time Required

Approximately three hours.

Materials

- Blank paper and a pencil for each team member.
- Newsprint and a felt-tipped marker.

Physical Setting

A room large enough to accommodate all team members, plus a separate area outside the room where the volunteer can meet with the facilitator.

Process

1. The facilitator asks for a volunteer, who is told to go to a separate area outside the room to await his or her instructions. The role of the volunteer and the purpose of the activity are not divulged at this time.

2. The facilitator gives the remaining team members the following information:
   - They are employees of an advertising company engaged in the business of promotion.
   - They have two tasks to complete in the next thirty minutes:
     a. To organize the company, select a name, establish a hierarchy, assign roles, clarify tasks, and produce an organizational chart reflecting the members’ decisions. This information will be collected by the facilitator at the end of ten
minutes. If this task is completed before the allotted time, work may proceed on the second task.

b. Prepare a set of twenty slogans or advertising themes for a potential client, the Fidelity Bank. The bank is interested in increasing deposits by means of an aggressive public relations campaign. (Twenty minutes.)

3. After the facilitator has briefed the advertising-company members, they are directed to begin working.

4. While the company members are engaged in their tasks, the facilitator goes outside the room and briefs the volunteer on his or her task. The volunteer is told that he or she will be joining an advertising company in a managerial capacity and is to spend the next ten minutes writing down some of his or her expectations for the job and listing contributions that he or she can make to the company.

5. At the end of the first ten minutes of the activity, the facilitator asks the company members for the organizational chart and introduces the volunteer to the company members, announcing that the person is joining the company as a manager. No further details are given.

6. While the company members are completing the second task, the facilitator adjusts the organizational chart to reflect the addition of the new manager.

7. When the company members have been working on the second task for twenty minutes, the facilitator calls time and asks for the list of slogans or themes.

8. The facilitator gives the team the adjusted organizational chart and instructs the team members to discuss their reactions to the experience. The following considerations can help to focus the team discussion:

   - Feelings experienced when the new member was introduced into the team;
   - The new manager’s feelings about joining an ongoing team and/or job expectations that were met or unmet;
   - The ways in which the team assimilated the new member or reacted to the change in its hierarchy; and
   - The effect of the new member on the team’s functioning. (Fifteen minutes.)

9. The facilitator leads the team members in the processing of their learnings. The team is given the task of generating a short list of functional ways to cope with inclusion issues in ongoing task teams. (Twenty minutes.)

10. The facilitator leads the team members in formulating generalizations about the effects of new members on team functioning. (Twenty minutes.)

11. The facilitator instructs individual members to state how they might apply the general principles learned from the experience to their own work situation. (Ten minutes.)
Variations

- One or more process observers can be recruited at the start of the activity to give feedback on team processes during the task phases of the activity.
- The facilitator can follow this activity with a lecturette on team-process issues relating to new-member inclusion at various stages such as pre-entry, entry, and post-entry.
- During step 11 the facilitator can instruct the team members to develop action steps that could be taken by organizations to reduce the dysfunctional effects of changes in work-team membership.

Submitted by Suresh M. Sant.
TEAM REVIEW: COMMUNICATING ABOUT ISSUES

Goals

- To provide an opportunity for open communication in a team.
- To stimulate discussion among the team members.
- To heighten the members’ awareness of one another’s attitudes about work-related topics.
- To assist the team members in identifying topics of concern for further consideration and review.

Group Size

All members of an ongoing team.

Time Required

Approximately four hours, plus prework.

Materials

- A copy of the Team Review Sheet for each team member (prepared and distributed by the facilitator in advance).
- A copy of a brief overview of the activity objectives for each team member (prepared and distributed by the facilitator in advance).
- A newsprint poster listing the following questions (prepared by the facilitator in advance):
  - Did your subgroup select “safe” items rather than difficult issues?
  - Did any member’s commitment to a position—or the entire subgroup’s commitment—hinder your subgroup from thoroughly discussing the items?
  - Which items from the list of major issues that was posted have not yet been addressed?
  - How can the total team best communicate its suggestions to the appropriate people in the organization?
- Several sheets of blank paper and a pencil for each team member.
- Newsprint and a felt-tipped marker.
- Masking tape for posting newsprint.
Physical Setting

A room that is large enough for the team members to work in subgroups without disturbing one another. Movable chairs and writing surfaces should be provided.

Process

1. **Prework:** At least several days prior to the scheduled session, a copy of the Team Review Sheet and a brief overview of the activity objectives are given to all team members. The members are asked to complete the Team Review Sheet before the scheduled session begins and to bring it with them to the session. They also are told that their responses to the items will provide the basis for the activity but that they will not be requested to turn in their responses.

2. When the scheduled session is convened, the facilitator reviews the goals and the procedure of the activity and then distributes blank paper and pencils, explaining that the team members may want to make notes for their own use. (Five minutes.)

3. The facilitator asks the team members to refer to their completed Team Review Sheets and leads a discussion to determine which items are most relevant to the team members. The facilitator lists these items on newsprint, in order of priority, and posts the newsprint. (The team members may have to vote in order to facilitate the selection and prioritizing processes.) (Twenty minutes.)

4. The team members are divided into subgroups of three or four members each, based on the discussion items on which they want to focus (excluding items 16 through 20, which, the facilitator explains, will be dealt with later in the activity). A subgroup may work on several short items or may select a larger issue (such as item 27) and work solely on that item in the time allotted. The subgroups are instructed to organize themselves for discussion and reporting and then to begin to discuss the items that they have selected. (Thirty minutes.)

5. The total team is reconvened, and a spokesperson from each subgroup reports on the general points of view or areas of agreement/disagreement as well as any suggestions about how the team or the organization might address the subgroup’s concerns. After each subgroup’s report, members of the other subgroups are asked to react briefly and/or to ask questions for clarification. (Fifteen minutes.)

6. Each subgroup reviews its discussions, noting the comments made to the subgroup by the rest of the team as well as the subgroup members’ personal reactions to the discussion task. Suggestions for improvement in the subgroup’s process are made at this time. (Ten minutes.)

7. Each subgroup selects new discussion items (excluding items 16 through 20), and the process is repeated. (Fifty minutes.)
8. The facilitator posts the list of newsprint questions (see Materials) and asks the members of each subgroup to spend twenty minutes discussing these questions. (Twenty minutes.)

9. The facilitator elicits reactions to the subgroup discussions. (Ten minutes.)

10. The subgroups are asked to discuss items 16 through 20 on their Team Review Sheets. (Thirty minutes.)

11. The facilitator reassembles the entire team and asks each team member to review the list of items on the posted newsprint and to reorder the item numbers to establish a new discussion agenda, with the most important unanswered items at the top of the list. The team members are encouraged to keep their notes on the reordered items, to continue discussing their views on these items when they return to work, and to communicate their opinions and suggestions to one another and to the appropriate people in the work setting. (Five to ten minutes.)

12. The facilitator leads a concluding discussion of the experience. The following questions may be used to guide the discussion:

- How did your subgroup approach the discussion task? What strategy did your subgroup develop for covering the material in the time allowed?
- How did your subgroup’s strategy change when you were running out of time?
- What impact did the individual members’ item preferences have on your subgroup’s final item choices?
- What communication pattern developed within your subgroup?
- How did that pattern change as your subgroup discussed different issues and items?
- In your subgroup what patterns or behaviors increased your willingness to communicate and plan with your fellow subgroup members? What patterns or behaviors decreased your willingness to communicate and plan?
- As a result of this activity, what have you learned about communication and planning?
- How can you use what you have learned to benefit your team in the future?

**Variations**

- A team-building session may be scheduled to address the remaining items on the review sheet.
- The facilitator may draw attention to the fact that there may be as much difference of opinion within a team as there is between teams. A general discussion of the costs and advantages of clarifying team members’ opinions may be conducted.
- Given the time constraints for the activity, it is likely that not all items on the review sheet will be considered. The facilitator may provide a lecturette on time management and point out the need to acknowledge that less-important things might never be done.
TEAM REVIEW SHEET

Instructions: Go through this material prior to the session scheduled for the members of your team. These questions will help to tailor the session to your team’s needs and interests. Do a lot of your thinking on paper; make notes on separate paper as ideas occur to you, and bring these notes with you to the team session.

1. What one special issue or problem would you like the rest of the team to know about concerning your job or its setting?
2. What specific concept, method, or strategy would you like to learn that would be most relevant to your job right now?
3. What one specific concept, method, or strategy do you wish that your team leader would be able to apply more effectively?
4. What concept, method, or strategy do you think would be the greatest help to a new first-level supervisor?
5. What possible future team problems are you aware of (but about which no one else seems to care) that are going to have an impact on your job?
6. How good is your knowledge of:
   ■ Team norms and expectations?
   ■ Organizational policies, procedures, rules, and regulations?
   ■ Your leader’s management philosophy?
   ■ The requirements of your fellow team members’ jobs?
   ■ Your leader’s opinion of your work?
7. How do you compare with the other people at your level within the company?
8. How do you think you compare with the people at the next-higher level?
9. Are you concerned that the team might discuss things that would not work in your own individual setting? If so, list the specific things that concern you.
10. During the team session, you might receive feedback on your personal characteristics. Does the thought of finding out more about yourself concern you? If so, how?
11. Write a description of your job. Specify how your job is important to the overall effectiveness of the operation.
12. What is your concept of ideal attainment in your “career”?
13. Over what incentives do you have complete control in your work setting?
14. What are the main limitations of the current system of performance appraisal and review?
15. At this time what feedback do you receive about the job you are doing?
16. Describe your team in terms of:
   - Overall effectiveness;
   - Quality of people; and
   - Ability to work effectively with others.

17. With what other team do you interact most? What is your impression of its:
   - Overall effectiveness?
   - Quality of people?
   - Ability to work effectively with others?

18. Which other team would say that your operation is effective?
19. Which other team would say that your operation is ineffective?
20. What specific goals or standards operate in your team?
21. Which team, department, or section within the organization has the most problems?
22. How and what do leaders report to staff departments and higher management to help them to control the larger operation?
23. What is your overall judgment of communication within the company?
24. What is your overall judgment of the planning function that exists within the company?
25. What are the positive aspects of working for your company rather than for another company in the same line of work?
26. What are the least satisfying aspects of working for your company?
27. How well does your team meet the needs of:
   - Its members?
   - Its leader?
   - Its customers or clients (both internal and external)?
   - The organization?

28. How well do you think the company meets the needs of:
   - Its employees?
   - Its suppliers?
   - Its creditors?
   - The community?
   - Its customers or clients?
- Its owners?
- Local, state, and Federal governments?

29. Think of the last three people who have resigned from the company. Then think about yourself and at least two other people who have stayed. What do the people who have left have in common that is different from what the people who have stayed have in common?

30. If you were to be assigned to a task force to write a report on some aspect of the company—such as its day-to-day operations or its ability to adapt to challenges in the future—with what three other people would you want to work in producing the report?
TEAM INTERVENTIONS: MOVING THE TEAM FORWARD

Goals
- To present a team-development model for team leaders and supervisors.
- To provide an opportunity for participants to analyze team performance and assess team needs.
- To provide an opportunity for participants to suggest leader interventions that are based on stages of team development.

Group Size
Ten to thirty team leaders/supervisors in subgroups of five to seven members each.

Time Required
Two to two and one-half hours.

Materials
- A copy of the Team Development Summary Sheet for each participant.
- A copy of the Team Development Intervention Sheet for each participant.
- A copy of the Team Development Vignettes Sheet for each participant.
- A newsprint flip chart and felt-tipped markers for each team.
- Masking tape for each team.

Physical Setting
A room large enough for teams to work without disturbing one another. Movable chairs and tables are suggested.

Process
1. The facilitator presents the goals of the activity and forms subgroups (“teams”) of five to seven members each. Each team is given a newsprint flip chart, felt-tipped markers, and masking tape. (Five minutes.)
2. The team members are requested to get acquainted by sharing their names, job information, and two or three suggestions about how the group might work together as a team. (Five to ten minutes.)
3. The facilitator delivers a lecturette on stages of team development, then gives each participant a copy of the Team Development Summary Sheet and reviews the contents. (Ten to fifteen minutes.)

4. The facilitator explains that certain interventions by the team leader can assist the team in completing the outcomes for each stage of development and moving into the next. The facilitator gives each participant a copy of the Team Development Intervention Sheet and reviews the contents. (Five to ten minutes.)

5. The facilitator gives a copy of the Team Development Vignettes Sheet to each participant and reads the instructions aloud. Teams are advised to spend about ten minutes on each vignette and to list their interventions on newsprint. The facilitator makes ten-minute announcements and calls time. (Sixty minutes.)

6. Each team is requested to post its interventions so that all can see them. (Five minutes.)

7. The total group is reassembled. Posted interventions are compared with the Team Development Intervention Sheet in the following manner: all groups' strategies for vignette 11 are compared with the sheet; all groups' strategies for vignette 12 are compared with the sheet; and so on. Team vignette 11 represents stage 1; vignette 12 represents stage 2; vignette 13 represents stage 3, and so on. The facilitator leads an ongoing discussion relating interventions to team-development concepts. (Fifteen to twenty minutes.)

8. The facilitator engages the participants in a discussion of the activity. The following processing questions may be included:
   - What were your reactions as you progressed through this activity?
   - How did your team members interact while you were working on this task?
   - How did this reflect the team's stage of development?
   - What interventions were used to move your team along?
   - What have you learned about the stages of team development?
   - What, specifically, did you learn in this activity about what a team leader can do to affect the group's progress?
   - How can you use the information from this activity in your jobs?
   (Ten to fifteen minutes.)

Variations

- Teams can work on only one, two, or three of the vignettes, thus reducing the amount of time required for the activity.
- The facilitator can demonstrate effective leader behavior using one of the vignettes.
Each team can write its own real-life vignette and then exchange with another team to get a different perspective on it. (A real-life vignette can be role played.)

- The Team Development Summary Sheets can be distributed prior to the activity.
TEAM DEVELOPMENT SUMMARY SHEET

Introduction

Like individuals, teams progress through different stages of development as they mature. Tuckman¹ identified five stages of team development: forming, storming, norming, performing, and adjourning.

In each stage, team members exhibit typical “task” and “relationship” behaviors, consistent with the basic theme of that particular stage of development. The relationship behaviors correlate with the development of the identity and functions of the group from the personal orientations of the members. The task behaviors correlate with the progress of the group in understanding and accomplishing its work. Issues and concerns must be resolved in each stage before the group can move on. The completion of each stage results in specific task outcomes as well as relationship outcomes that address member needs at that stage.

Both transactional leader skills (those that get the task completed) and transformational leader skills (those that influence and inspire people) can be used to move the team from one stage of development to the next. The leader skills listed for each stage of team development are translated into actions, or interventions, the leader can make in order to help the group to complete each stage's task.

The chart on the next page (Figure 1) summarizes the stages of group development, team building, and leadership skills.

### GROUP DEVELOPMENT

<table>
<thead>
<tr>
<th>TUCKMAN STAGE</th>
<th>GENERAL THEME</th>
<th>TASK BEHAVIOR</th>
<th>RELATIONSHIP BEHAVIOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Forming</td>
<td>Awareness</td>
<td>Orientation</td>
<td>Dependence</td>
</tr>
<tr>
<td>2. Storming</td>
<td>Conflict</td>
<td>Resistance</td>
<td>Hostility</td>
</tr>
<tr>
<td>3. Norming</td>
<td>Cooperation</td>
<td>Communication</td>
<td>Cohesion</td>
</tr>
<tr>
<td>4. Performing</td>
<td>Productivity</td>
<td>Problem Solving</td>
<td>Interdependence</td>
</tr>
<tr>
<td>5. Adjourning</td>
<td>Separation</td>
<td>Termination</td>
<td>Disengagement</td>
</tr>
</tbody>
</table>

### TEAM BUILDING

<table>
<thead>
<tr>
<th>TUCKMAN STAGE</th>
<th>TASK OUTCOME</th>
<th>RELATIONSHIP OUTCOME</th>
<th>INDIVIDUAL NEED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Forming</td>
<td>Commitment</td>
<td>Acceptance</td>
<td>Security</td>
</tr>
<tr>
<td>2. Storming</td>
<td>Clarification</td>
<td>Belonging</td>
<td>Social</td>
</tr>
<tr>
<td>3. Norming</td>
<td>Involvement</td>
<td>Support</td>
<td>Recognition</td>
</tr>
<tr>
<td>4. Performing</td>
<td>Achievement</td>
<td>Pride</td>
<td>Achievement</td>
</tr>
<tr>
<td>5. Adjourning</td>
<td>Recognition</td>
<td>Satisfaction</td>
<td>Recognition</td>
</tr>
</tbody>
</table>

### LEADERSHIP SKILLS

<table>
<thead>
<tr>
<th>TUCKMAN STAGE</th>
<th>TRANSACTIONAL LEADER SKILLS</th>
<th>TRANSFORMATIONAL LEADER SKILLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Forming</td>
<td>Getting Acquainted, Goal Setting, Organizing</td>
<td>Value Clarification, Visioning, Communicating Through Myth and Metaphor</td>
</tr>
<tr>
<td>2. Storming</td>
<td>Active Listening, Assertiveness, Conflict Management</td>
<td>Flexibilitity, Creativity, Kaleidoscopic Thinking</td>
</tr>
<tr>
<td>3. Norming</td>
<td>Communication, Feedback, Affirmation</td>
<td>Playfulness and Humor, Entrepreneuring, Networking</td>
</tr>
<tr>
<td>4. Performing</td>
<td>Decision making, Problem Solving, Rewarding</td>
<td>Multicultural Awareness, Mentoring, Futuring</td>
</tr>
<tr>
<td>5. Adjourning</td>
<td>Evaluating, Reviewing</td>
<td>Celebrating, Bringing Closure</td>
</tr>
</tbody>
</table>

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TEAM DEVELOPMENT INTERVENTION SHEET

Stage One: Forming. Theme: Awareness
- Allow time for members to get acquainted
- Provide essential information about content and process
- Emphasize new skills required
- Identify and relate key team values to current task
- Share stories of past accomplishments and celebrations
- Create a team vision of outcome
- Set goals to achieve outcome

Stage Two: Storming. Theme: Conflict
- Act assertively and set parameters for the team
- Listen attentively to all viewpoints
- Use mediation, negotiation, and arbitration
- Consider new perspectives and alternatives
- Suggest and solicit optional ways to view the problem

Stage Three: Norming. Theme: Cooperation
- Provide opportunity for involvement by all
- Provide opportunity for members to learn from and assist one another
- Model and encourage supportive behavior
- Open communication lines
- Provide positive and corrective task-related feedback
- Add some humor and fun to the work setting

Stage Four: Performing. Theme: Productivity
- Reward and recognize performance outcomes and positive work relationships
- Involve the team in group problem solving and futuring
- Share decision-making opportunities
- Examine how implementation will affect the team and the rest of the organization
- Use delegation to foster professional development
Stage Five: Adjourning. Theme: Separation

- Provide evaluative performance feedback
- Review task and working relationships
- Create a celebration activity with emphasis on recognition and fun
- Conduct a closure ceremony to specify the project's conclusion
TEAM DEVELOPMENT VIGNETTES SHEET

Instructions: Read each vignette and suggest some interventions that the team leader might make in order to improve team development.

Team Vignette #11
You are working with an old team on a new, very different, project. The task is challenging, and creative problem solving will be critical. In past efforts of the team, there were few choices and very little flexibility. Some talents that team members have but have not used recently will be needed on this project. You are concerned about increasing the motivational level of the team in addition to getting the project completed in a superior fashion.

Team Vignette #12
Team members disagree about the importance of the current project and, therefore, the time needed to complete it. One group of team members sees the task as helpful but not essential to the organization. They want to finish it adequately but quickly. A second set of team members wants to complete the task comprehensively, with the high quality characteristic of past team performance. A third group is trying to develop a compromise. A few members have not expressed opinions and are attempting to stay out of the debate. You would like to resolve the matter and get the team to reach agreement or, at least, consensus. Your personal preference is for a quality effort.

Team Vignette #13
The team has recently resolved a volatile disagreement regarding the appropriate strategy to use in the implementation of a major goal. You want to move forward as quickly as possible. The group appears somewhat hesitant and continues to look to you for direction. Members appear capable of continuing the task but are concerned about how much time will be required. Some work has been begun by individuals working independently and in pairs. Although you see some progress, you would like more of a unified effort.

Team Vignette #14
The team appears to be cohesive and unified regarding the current project. All members are competent to complete the task. The implementation and evaluation phase will be critical and will impact the total organization. Current goals are challenging but realistic. So far, quality standards have been maintained. You are eager to complete the project at this high level of performance.
Team Vignette #15

The team has just completed a major project. Although there were some difficulties getting started and some conflicts concerning the use of resources, compromises were used to move to completion. Each team member made a significant contribution, adding specific skills that were critical to the success of the project. The team views this accomplishment as a total team effort. However, all members of the team will not be needed for the next project, which is less complex. Some members will be assigned to other tasks. All assignments will be based on the skill requirements of the new projects.
THE SEVEN PIECES: IDENTIFYING TEAM ROLES

Goals

- To introduce the team members to the roles that emerge in a team.
- To provide the team members with an opportunity to experience and assume some of these roles and to observe their impact on the team process.

Group Size

All members of an ongoing team.

Time Required

Approximately one hour.

Materials

- One large, sealed envelope containing all of the pieces of a puzzle constructed by the facilitator prior to conducting the activity (see The Seven Pieces Puzzle Directions).
- One copy of The Seven Pieces Lecturette on Team Roles for each team member.

Physical Setting

A room with a table and chairs for the team members.

Process

1. The facilitator asks the team members to sit at the table.
2. Without discussion or instruction, the facilitator places the envelope containing the puzzle pieces on the table. If asked any questions, the facilitator responds, “It’s up to you.”
3. The facilitator observes the team members as they decide what to do with the envelope and its contents.
4. After the team has completed the puzzle, the facilitator distributes copies of the lecturette on team roles and asks the team members to read this handout. Then the members are instructed to identify the roles that emerged as they worked together and the specific members who assumed these roles. The members are further instructed to discuss the impact of these roles on the way in which they approached and completed the task. (Twenty minutes.)
5. The total team is reconvened for a concluding discussion during which the facilitator asks the following questions:

- How did you feel when the envelope was placed on the table without comment? What thoughts entered your mind?
- How did the team begin its work? What roles were important at the beginning?
- What procedure did the team use to complete the puzzle? What roles contributed to this procedure?
- Which roles were not assumed by any of the team members? How did the absence of these roles affect the team process? What might have happened if these roles had been assumed?
- Which roles do you generally fulfill in this team? How do these roles contribute to your feelings about the team?
- What roles are missing in the team’s daily functioning? How does the absence of these roles affect your feelings about your team?
- What new team roles would you like to assume in the future? How might you accomplish this?

Submitted by Nadine J. (Hoffman) Carpenter.
THE SEVEN PIECES PUZZLE DIRECTIONS

Materials Needed

1. One piece of cardboard for each puzzle, each piece to be 8½ inches by 11 inches.
2. A pair of scissors.
3. A felt-tipped marker.

Directions for Constructing the Puzzle

1. Cut the cardboard into strips as follows:
   - Four strips, each 1 inch wide by 7 inches long;
   - One strip 1 inch wide by 5 inches long;
   - One strip 1 inch wide by 9 inches long; and
   - One strip 1 inch wide by 10 inches long.
2. Using a felt-tipped marker, write words on the strips as illustrated below (one letter or space per square inch, omitting letters as indicated):
   - 1-inch-by-7-inch strip: A L G E B A
   - 1-inch-by-7-inch strip: H S T O R Y
   - 1-inch-by-7-inch strip: E N G L I H
   - 1-inch-by-7-inch strip: B I O L O Y
   - 1-inch-by-5-inch strip: M U S I C
Solution to the Puzzle

1-inch-by-9-inch strip: Chemistry

1-inch-by-10-inch strip: Psychology

Enlightenment History

Psychology History

Music Algebra

THE SEVEN PIECES LECTURETTE ON TEAM ROLES

Within any team the members assume different roles, several of which have been determined to be necessary for a smoothly functioning, effective team. These roles may be assumed by separate members or shared by various members at different points, and in many cases one or more of the individual members may fulfill more than one role.

Every team has both task and maintenance functions. Some of the essential team roles are task related in that they help the team to accomplish things, and some are maintenance related in that they facilitate the participation of the members.

Task roles include these:

- **Initiator**: Proposes tasks, goals, or actions; defines team problems; suggests procedures.
- **Information seeker**: Asks for factual clarification; requests pertinent facts.
- **Opinion seeker**: Asks for clarification of the values pertinent to the topic under discussion; questions values involved in the alternative suggestions.
- **Informer**: Offers facts; gives expression of feelings; gives opinions.
- **Clarifier**: Interprets ideas or suggestions; defines terms; clarifies issues before the team; clears up confusion.
- **Summarizer**: Pulls together related ideas; restates suggestions; offers decisions or conclusions for the team to consider.
- **Reality tester**: Makes critical analyses of ideas; tests ideas against data to see if the ideas would work.
- **Orienter**: Defines the position of the team with respect to its goals; points to departures from agreed-on directions or goals; raises questions about the directions pursued in team discussions.
- **Follower**: Goes along with the movement of the team; passively accepts the ideas of others; serves as an audience in team discussion and decision making.

Maintenance roles include these:

- **Harmonizer**: Attempts to reconcile disagreements; reduces tension; gets people to explore differences.
- **Gatekeeper**: Helps to keep communication channels open; facilitates the participation of others; suggests procedures that permit sharing remarks.

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1 This lecturette has been adapted from *Process Politics: A Guide for Group Leaders* by E. Guthrie and W.S. Miller, 1981, San Diego, CA: Pfeiffer & Company. The descriptions of task and maintenance roles originated with and have been adapted with special permission from "What to Observe in a Group," by Edgar H. Schein, from *Reading Book* by Cyril R. Mill and Lawrence C. Porter, Editors, pp. 28-30, copyright 1976 NTL Institute for Applied Behavioral Science
- **Consensus taker:** Asks to see whether the team is nearing a decision; encourages the team to test possible solutions.

- **Encourager:** Is friendly, warm, and responsive to others; indicates by facial expressions or remarks the acceptance of others’ contributions.

- **Compromiser:** Offers compromises that yield status when his or her own ideas are involved in conflicts; modifies in the interest of team cohesiveness or growth.

- **Standard setter:** Expresses standards for the team to attempt to achieve; applies standards in evaluating the quality of team processes.

It can be useful for a team to determine which roles are fulfilled by which members. If certain roles appear to be missing, the members can plan to incorporate the associated behaviors into their team activities. In addition, determining roles allows the members to form a clear perception of their value to the team; they can consciously build on the behaviors that they naturally exhibit and that are comfortable to them, thereby helping the team to realize its potential.
THE CAR:
FEEDBACK ON TEAM-MEMBERSHIP STYLES

Goals

- To allow the team members to obtain feedback on their perceived role functions and membership styles.
- To enable a team to examine its operating style and to plan changes.
- To encourage and practice giving and receiving feedback.

Group Size
All members of an ongoing team.

Time Required
One hour and fifteen minutes.

Materials

- A copy of The Car Parts Sheet for each team member.
- A copy of The Car Work Sheet for each team member.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
A room with writing surfaces for the team members.

Process

1. The facilitator introduces the activity as an opportunity for the team members to practice giving and receiving feedback on their perceived role functions and membership styles. The facilitator provides the rationale for and gives an overview of the activity. The facilitator explains that by receiving feedback from many people about one aspect of our behavior, we can better determine the accuracy and usefulness of the feedback. The facilitator says that, following the feedback session, the team members will examine the role functions in their team and determine whether they need to add to or modify their behaviors in the team in order to improve its functioning. The facilitator also tells the team members that the initial feedback in this activity is to be given anonymously. (Five minutes.)
2. Each team member is given a copy of The Car Parts Sheet, a copy of The Car Work Sheet, and a pencil. The facilitator reads aloud the functions of the various car parts, ensuring that all members understand these functions. Then each team member is told to think of the team as a car and to determine which team member, if any, performs each of the sixteen functions and to write that member’s name next to the appropriate number on the work sheet. The team members are told to consider themselves as well as other members when making their decisions; they are also told that some names may be used more than once and some names may not be used at all. In addition, the facilitator asks the team members *not* to write their names on their work sheets. (Ten minutes.)

3. The facilitator collects the work sheets and asks the team members to spend a few minutes discussing their reactions to the activity thus far. (Five minutes.)

4. While the team members are engaged in discussion, the facilitator tabulates the work sheets on a newsprint chart listing the names of all team members. The facilitator notes how many times each member was nominated for each of the role functions (see the example in Figure 1).

<table>
<thead>
<tr>
<th>Group 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Member</strong></td>
</tr>
</tbody>
</table>
| Pat | Gas - 5  
Engine - 4  
Wheel - 1 |
| Dale | Headlights - 6  
Mud Guard - 3 |
| Lee | Baggage - 4  
Hood Ornament - 2 |

Figure 1. Example of Tabulation Chart

5. The newsprint chart is posted where all team members can see it. The facilitator states that although the actual sources of the feedback on the work sheets may remain anonymous, the members are to use this information as a basis for giving one another feedback and for exchanging general reactions to the membership roles represented in the team. The facilitator provides the following guidelines for giving feedback:

- The feedback is to be *descriptive*, not judgmental.
- The feedback is to describe *behavior*, not to guess at the intentions underlying the behavior.
- The feedback is to be *specific*, not general.
- The feedback is to be related to the members’ *behaviors in the team.*

The facilitator asks the team members to start and guides them through the feedback process. (Twenty minutes.)

6. At the conclusion of the feedback phase, the team members are instructed to share their reactions to the feedback and to discuss how it has affected their perceptions of themselves *in terms of their roles in the team.* (Ten minutes.)

7. The team members are asked to reflect silently for a few minutes on what the feedback implies about how they interact and on how they could change their own behavior so that the team’s interpersonal dynamics and functioning might be improved. The facilitator invites the team members to jot down a few notes on the reverse side of their parts sheets, if they wish. (Five minutes.)

8. The facilitator elicits comments about the manner in which the team currently operates in terms of membership roles and how the team’s functioning could be improved in this regard. (Ten minutes.)

9. The team members are encouraged to formulate contracts for desired changes and to establish procedures for reviewing their progress in this area at a specific time in the future. (Ten minutes.)

**Variations**

- If specific problem areas in the team’s functioning are identified, subgroups may be formed to discuss individual problem areas and to make specific suggestions for improvement.

- After step 9 the team members may form pairs. The members of each pair contract to help each other in implementing personal plans for improvement.

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Submitted by Alfred A. Wells.
THE CAR PARTS SHEET
THE CAR PARTS SHEET

1. HEADLIGHT: forward-looking; has foresight; takes the long view.

2. TAIL LIGHT: backward-looking; more concerned with where group has been than with where it is going; worries about history and precedent.

3. POTHOLE: makes every trip rough going.

4. SPRINGS: smooths out the rough spots; absorbs the bumps.

5. GAS: supplies energy, ideas, enthusiasm.

6. ENGINE: converts the energy; whirls the ideas; spreads the enthusiasm.

7. WHEELS: turn energy into forward motion and progress—the practical application of ideas and discussion.

8. ANCHOR: negative about everything; has to be dragged along.

9. STEERING WHEEL: keeps the group on track, heading on line toward goal.

10. HOOD ORNAMENT: out in front, polished, looks good, but doesn't contribute much.

11. BUMPER: can save the group's skin in case of accident.

12. MUD GUARD: keeps the flying "mud" from obscuring the group's view of the road.

13. RADIATOR: keeps cool; cools the rest down.

14. CONCERTINA: stretches the group; helps it to extend itself.

15. BAGGAGE: may contain good things, but it is hard to get it out when you need it.

16. RUMBLE SEAT: just along for the ride; with the group but not really part of it.
THE CAR WORK SHEET
THE CAR WORK SHEET
SYMBOLS: SHARING ROLE PERCEPTIONS

Goals

- To familiarize the team members with the various roles that exist in a team.
- To provide the team members with an opportunity to share perceptions of their roles in their team.
- To provide the team members with the opportunity to practice giving and receiving feedback.

Group Size

All members of an ongoing team.

Time Required

Approximately one hour and fifteen minutes.

Materials

- A copy of the Symbols Role Sheet for each team member.
- A copy of the Symbols Individual Role Tabulation Sheet for each team member.
- A pencil for each team member.
- Several pairs of scissors.
- A clipboard or other portable writing surface for each team member.
- A copy of the Symbols Team Role Tabulation Sheet, prepared in advance on newsprint.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A room large enough so that the team members can work comfortably.

Process

1. The facilitator introduces the goals of the activity with the explanation on the following page:
   “Every team requires that certain roles be filled. In this activity we are going to take a look at fifteen specific roles. As a result of this activity, you will have the
opportunity to see how you view your own roles, how others see you, and how your
team fulfills these functions.”
(Five minutes.)

2. Each team member is given a copy of the Symbols Role Sheet, a pencil, and a
clipboard or other portable writing surface. The facilitator leads a discussion of the
roles listed to ensure that the team members understand them before starting work
on the activity. (Ten minutes.)

3. The team members are instructed to work independently to assign the roles on the
Symbols Role Sheet. (Ten minutes.)

4. After distributing a copy of the Symbols Individual Role Tabulation Sheet to each
team member, the facilitator directs the team members to complete the first column,“How I See Myself,” by checking off the roles to which they assigned themselves.
(Five minutes.)

5. The facilitator instructs the team members to cut apart the role sheet along the
dashed lines and to distribute the resultant slips of paper to the people whose names
are listed on them. The role sheets that have not been assigned to a particular
individual are collected by the facilitator. The team members are then instructed to
complete the second column of the Symbols Individual Role Tabulation Sheet,
“How Others See Me,” and to spend some time reflecting on the implications.
(Fifteen minutes.)

6. The facilitator tallies the team roles on the prepared newsprint poster (see Materials)
by having the team members read the results of their second columns aloud. Each
team member has the opportunity to ask clarification questions, such as “What do I
do that leads others to put me in this role or that leads others not to see me in a role
in which I see myself?” (Fifteen minutes.)

7. The facilitator leads a concluding discussion based on these questions:

- What were your feelings and thoughts as you assigned your fellow team members
to roles? What were your feelings as you assigned yourself to roles?

- How did you feel about the roles you were assigned by others? What similarities
and differences did you find between how you see yourself and how others see
you? What roles would you like to fulfill?

- Under what circumstances do the members of your team compete for roles?
Under what circumstances do you leave roles unfilled?

- How do these roles help the team accomplish its goals? What particular strengths
or areas for team improvement do you see?

- What is one role each of you could fulfill right now to improve the team effort?
Variations

- After step 7 each team member may be asked to choose a particular role that he or she currently fills or would like to fill within the team. Other team members then provide feedback about the choice, its feasibility if not currently filled, what action steps might be needed, areas of improvement, and so on.

- Additional discussion might focus on the roles not perceived as filled within the team and ways in which those functions could be (or are being) covered.
SYMBOLS ROLE SHEET

Instructions: These roles are to be assigned to members of your team, including yourself. Base your decisions on your own perceptions of how your team functions, considering factors such as a person’s leadership ability, tasks, personality, and so on. A person may be assigned to more than one role, and certain roles may be left unfilled.

Clarifier: Interprets ideas or suggestions; defines terms; clarifies issues before the team; clears up confusion.

Compromiser: Offers compromises that yield status when his or her ideas are involved in conflicts; modifies in the interest of team cohesion or growth.

Consensus taker: Asks to see whether the team is nearing a decision; “sends up trial balloons” (asks questions and makes comments) to test possible solutions.

**Encourager:** Is friendly, warm, and responsive to others; indicates by facial expressions or remarks the acceptance of others’ contributions.

![Smiley Face]

**Follower:** Goes along with the movement of the team; passively accepts the ideas of others; serves as an audience in team discussion and decision making.

![Ear]

**Gatekeeper:** Helps to keep communication channels open; facilitates the participation of others; suggests procedures that permit sharing remarks.

![Gate]

**Harmonizer:** Attempts to reconcile disagreements; reduces tension; gets people to explore differences.

![Notes]
**Information seeker:** Asks for factual clarification; requests facts pertinent to the discussion.

```
?  ?  Facts
Facts  ?  ?
?  ?  Facts
Facts  ?
```

**Informer:** Offers facts; gives expression of feelings; gives opinions.

![Newspaper](image)

**Initiator:** Proposes tasks, goals, or actions; defines the team problems; suggests procedures.

![Arrow](image)

**Opinion seeker:** Asks for clarification of the values pertinent to the topic under discussion; questions values involved in the alternative suggestions.

```
?  ?  Values
Values  ?  ?
?  ?  Values
Values  ?
```
**Orienter**: Defines the position of the team with respect to its goals; points to departures from agreed-on directions or goals; raises questions about the directions pursued in team discussions.

![Compass](image)

**Reality tester**: Makes critical analyses of ideas; tests ideas against data to see if the ideas would work.

![Flasks](image)

**Standard setter**: Expresses standards for the team to attempt to achieve; applies standards in evaluating the quality of team processes.

![Ruler](image)

**Summarizer**: Pulls together related ideas; restates suggestions; offers decisions or conclusions for the team to consider.

\[
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### SYMBOLS INDIVIDUAL ROLE TABULATION SHEET

**Instructions:** Begin by completing the first column. Put a check mark next to each role that you assigned yourself. After the facilitator distributes the role assignments made by your fellow team members, complete the second column by writing the number of times you were assigned a certain role by members of your team. When you have completed the second column, note the similarities and differences in the roles you assigned yourself and those assigned to you by your fellow team members.

<table>
<thead>
<tr>
<th>Role</th>
<th>How I See Myself</th>
<th>How Others See Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarifier</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Compromiser</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Consensus</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Encourager</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Follower</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Gatekeeper</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Harmonizer</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Information seeker</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Informer</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Initiator</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Opinion seeker</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Orienter</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Reality tester</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Standard setter</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Summarizer</td>
<td>_____</td>
<td>_____</td>
</tr>
</tbody>
</table>
## SYMBOLS TEAM ROLE TABULATION SHEET

*Instructions to facilitator:* Prepare newsprint in advance using the format provided. Adjust the number of columns so that all team members’ names can be listed.

<table>
<thead>
<tr>
<th>Role</th>
<th>Name 1</th>
<th>Name 2</th>
<th>Name 3</th>
<th>Name 4</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarifier</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Compromiser</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Consensus</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Encourager</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
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<td>_____</td>
</tr>
<tr>
<td>Follower</td>
<td>_____</td>
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<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Gatekeeper</td>
<td>_____</td>
<td>_____</td>
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<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Harmonizer</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Information seeker</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Informer</td>
<td>_____</td>
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<tr>
<td>Initiator</td>
<td>_____</td>
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<tr>
<td>Opinion seeker</td>
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<tr>
<td>Orienter</td>
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<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Reality tester</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Standard setter</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>Summarizer</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
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<tr>
<td>Total Number of Roles</td>
<td>_____</td>
<td>_____</td>
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</tr>
</tbody>
</table>
ROLE NOMINATIONS:
A FEEDBACK EXPERIENCE

Goals
- To provide feedback to team members on the roles that fellow members see them playing.
- To study various types of roles in relation to team goals.
- To demonstrate that leadership in a small group consists of several functions that should be shared among members.

Group Size
All members of an ongoing team.

Time Required
Approximately one and one-half hours.

Materials
- A copy of the Role Nominations Form for each team member.
- Blank paper and a pencil for each team member.

Physical Setting
The team members should be seated so that they can write comfortably, preferably at tables or desk chairs.

Process
1. The facilitator gives a lecturette on roles that team members often play. He or she explains that some roles relate to the team’s task, some maintain and enhance the functioning of the team, and some detract from the team’s work. The facilitator distributes the Role Nominations Forms and explains each of the fifteen roles included. (Names of members should be written in the same order on all the forms before the meeting begins.) The team members follow the instructions on the form.
2. When every team member has completed the form, each member calls out all the marks that he or she put down, and each team member makes a complete tally for the entire team.
3. The team has a discussion of the array of tallies. Individual members are encouraged to solicit feedback on their distribution of nominations. Attention may be given to
whether people play various functional roles and to methods of coping with dysfunctional roles.

**Variations**

- When the forms have been completed, the facilitator can collect them and read them aloud without revealing who completed them.
- Individual members can be instructed to predict the nominations that they will receive.
- The number of nominations can be restricted to one per person or one per role.
- The activity can be accelerated by using fewer roles.
- Following the activity the facilitator can structure a practice session on shared leadership. Members work on a task and attempt to play all the task and maintenance roles. Then the nominations are repeated.

---

This activity is based on the role formulations of K. Benne and P. Sheats, 1948, “Functional Roles of Group Members,” in *The Journal of Social Issues, 4*(2).
**ROLE NOMINATIONS FORM**

*Instructions:* For each member, place check marks in the columns corresponding to the roles that he or she has played most often in the team. Include yourself.

<table>
<thead>
<tr>
<th>MEMBERS</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

**Task Roles**
- Initiator
- Information seeker
- Information giver
- Coordinator
- Orientee
- Evaluator

**Maintenance Roles**
- Encourager
- Harmonizer
- Gatekeeper
- Standard setter
- Follower

**Anti-Group Roles**
- Blocker
- Recognition seeker
- Dominator
- Avoider
LINE-UP AND POWER INVERSION: AN EXPERIMENT

Goals

- To expand the team members’ awareness of their individual influence on the team.
- To experience power inversion.

Group Size

All members of an ongoing team.

Time Required

Approximately one and one-half hours.

Materials

- Three sheets of paper and a pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting

A room with ample space for the team members to move around. Chairs should be arranged in a semicircle for phase 2.

Process

Phase 1:

1. The facilitator instructs the team members to arrange themselves in rank order according to each individual’s influence on the team. This must be done nonverbally.
2. The facilitator records the order on newsprint and posts it where it can be seen easily.
3. The team sits down and discusses the ranking experience. The facilitator may introduce certain observed behaviors, such as withdrawal from the ranking process to avoid conflict.

---

1 This activity is best used in a design that links it with “Dividing the Loot,” found in Section 4 of this volume. “Line-Up and Power Inversion” should precede the use of “Dividing the Loot.”
4. The facilitator asks the team to repeat the ranking process and the discussion as many times as necessary for the team to be satisfied that the rank order reflects each individual’s influence.

Phase 2:

1. The facilitator tells the team members that they are to elect an effective, “fair” leader. He or she explains that the voting power of each individual will be in inverse proportion to the amount of influence credited to that individual in the final rank order; for example, the member ranked twelfth, or least influential, will have twelve votes, while the member ranked first will have just one vote. This will alter the power focus, allowing individuals to experiment with new behaviors involving power or lack of power.

2. The facilitator informs the team members that they may caucus before this election but they may communicate only by written notes. They may have ten minutes to write notes. All notes will be delivered at the end of that time.

3. When notes have been delivered, the facilitator informs the team that the note-writing process may be repeated once or twice to complete the caucus.

4. The team selects a leader by casting ballots. Ballots must show the rank-order number of the individual who is voting and the name of the individual for whom the ballot is cast. (Votes may not be split.)

5. The elected leader directs a team discussion on the impact of refocusing power. Afterward the leader solicits feedback on his or her leadership style.

Variations

- Before the initial line-up, each team member can independently rank-order the members according to influence (either influence on the team or on himself or herself).

- The team members can be permitted to talk during the line-ups.

- Traits other than influence can be used. For example, the team members can rank-order one another on openness, assertiveness, or congruence between verbal and nonverbal behaviors.

- The number of rounds in each phase can be varied.
AMERICA’S FAVORITE PASTIME: CLARIFYING ROLE PERCEPTIONS

Goals

- To identify the various roles that exist in a team.
- To provide a means for sharing the team members’ perceptions of their roles.
- To develop the members’ awareness of their own contributions to the team as well as the contributions of fellow team members.
- To assist the team members in identifying ways to use their perceptions of their own and one another’s roles to improve team functioning.

Group Size

All members of an ongoing team.

Time Required

One hour and forty-five minutes to two hours.

Materials

- A copy of the America’s Favorite Pastime Position Sheet for each team member.
- A pencil for each team member.
- A newsprint version of the baseball diamond illustrated on the position sheet (prepared in advance). The titles of the twelve roles should be written on the newsprint, but the role descriptions should not.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A room in which the team members can work comfortably and without interruptions. Movable chairs should be provided.

Process

1. The facilitator begins by stating that often people use baseball expressions to describe events at work: “She really hit a home run with that idea” or “When the meeting ended, I felt as if I’d been left stranded on second base” or “When the two of them started arguing, I felt as if I’d gotten caught in a squeeze play.”
facilitator then says that the world of baseball and the world of work are related in other ways as well and begins a discussion about the similarities between a baseball team and a work team. During the discussion the facilitator emphasizes these similarities:

- The team purpose is to win, and a variety of tasks must be carried out to accomplish that purpose.
- The many different tasks that have to be carried out are distributed among the various “players,” management, and support personnel.
- Sometimes when members are missing or not functioning well, other team members cover for them and provide backup.
- In addition to specifically assigned duties, the members have a number of general and supportive functions to perform.
- Sometimes conflicts arise when members trip over one another in their attempts to carry out the same task, compete for the “best score,” blame one another for not “making the catch,” or “shake off” directions.

(Ten minutes.)

2. The facilitator introduces the goals of the activity and explains that the team will be examining how it functions by comparing its various roles to those on a baseball team.

3. The facilitator distributes copies of the America’s Favorite Pastime Position Sheet and reviews the twelve roles described on the sheet. As each role is discussed, the facilitator asks the team members to contribute any additional information about the responsibilities of that role, particularly those responsibilities for which parallels can be drawn with a similar role in a work team. As contributions are made, the facilitator lists them on newsprint; a separate sheet of newsprint is completed and posted for each role. (Twenty minutes.)

4. The facilitator distributes pencils, instructs each team member to work individually to make up an imaginary baseball team from the members of the work team, and provides the following guidelines for completing the task:

- The roles on the position sheet should be assigned to team members who function in similar capacities.
- The team members should base their decisions on individual members’ tasks, authority, leadership abilities and functions, and personalities.
- Not all twelve roles must be assigned; it is possible that some of the roles may not appear to be filled by anyone on the team.
More than one member may be assigned to one role, and each member may have
more than one role; the decision depends entirely on each team member’s
perception of how the work team functions.

The team members should consider their own roles on the team and assign
positions to themselves as appropriate.

After eliciting and answering questions, the facilitator tells the team members that
they have ten minutes to complete the task and asks them to begin.

5. At the end of the ten-minute period, the facilitator calls time, asks the team members
to assemble into a semicircle in such a way that each person can see everyone else,
and posts the newsprint diamond in front of the team members. The facilitator deals
with each of the positions separately and asks the team members to call out the
names of the members they have assigned to that position. All names are recorded
in the appropriate areas on the newsprint diamond. After all positions have been
covered, the facilitator asks the team members to take turns explaining why they
assigned names as they did. (Thirty minutes.)

6. The facilitator leads a concluding discussion by asking the following questions:

- What were your feelings and thoughts while deciding which names to assign to
  the various roles?

- How did you feel about the assignments you received from others? How did you
  feel about the explanations of these assignments? How do you feel about any
  discrepancies between your own perception of your role and your team members’
  perceptions?

- What is it like to fill your role on the team as you see it?

- What do the assignments say about the way in which your team functions? How
  clear are the roles of the team members?

- When do the players on your team trip over one another in trying to play the
  same role, compete for the “best score,” blame one another for not “making the
  catch,” or “shake off” directions? When and how is the ball being dropped
  because there is no team member to play a particular role? What do these
  circumstances suggest to you?

- How are members credited, praised, or rewarded for the positions they fill? How
  can the team do a better job of crediting the accomplishments of its members?

- How are the team members critiqued or coached on improvement? How could
  that process be improved?

- How do the members cover for one another and provide backup?

- How do the members’ role assignments help the team to fulfill its purpose or
  mission?
Which roles would you like to play? Which roles might represent avenues of growth for you?

What do you need or want to do to use what you have learned during this activity? What can you do to help your team improve its functioning?

Variations

- This activity may be used to introduce or set the agenda for a team-building session. The data from the activity then serve as a basis for further work during the session.
- As a follow-up to the last discussion question in the final step, the team members may be asked to draw baseball diamonds with their ideal assignments of team members.
- The baseball analogy may be used to examine external factors affecting the team. The following questions offer examples:
  - What cheerleaders does your team have?
  - Who is the batter you fear most?
  - Whom would you like to see in the bleachers? Who do you wish would stay home?
  - The baseball analogy may be used to focus on team goals (What would “going for the pennant” mean?) or on relationships within the team (What would you like to say to the coach?).
- If the team is small, basketball analogies may be used.

Submitted by Tim Hildebrandt.
AMERICA’S FAVORITE PASTIME POSITION SHEET

Left Fielder
Fields the hits that are far out, is good on grounders, climbs the wall to stop home runs

Center Fielder
Throws long, travels the farthest, looks deep and wide

Right Fielder
Shifts with the batter, fields foul balls, covers first base

Shortstop
Makes the glamorous catch, dives for the line drive, starts the double play, covers second base, is team “hot shot”

Second Base
Relays the ball from the outfield, cuts off the base runner

First Base
Is first in line for the hard throw, has long reach, must stay on feet

Third Base
Moves in for the fast play, is right on top of things, covers the bunts, anticipates the play

Pitcher
Starts the game, raises the issues, is excellent judge of character, glances over shoulder for the “steal”

Manager/Coach
Directs, keeps on track, analyzes plays, plans for improvement, makes connections, reminds of goals

Water Person
Provides support and maintenance

Catcher
Controls the traffic, calls the plays, captains the team because he/she can see the whole field

Umpire
Makes decisions, judges fairness of proceedings
MULTIPLE ROLES: NATURE AND ORIENTATION

Goals

- To develop the team members’ awareness of multiple roles in teams.
- To offer the team members a system for categorizing the nature and orientation of team roles.
- To offer the team members the opportunity to determine ways to improve team functioning in the future.

Team Size

All members of an ongoing team.

Time Required

Approximately two hours.

Materials

- A copy of the Multiple Roles Work Sheet for each team member.
- A copy of the Multiple Roles Team Chart for each team member.
- A copy of the Multiple Roles Theory Sheet for each team member.
- A clipboard or other portable writing surface for each team member.
- A pencil for each team member.
- A newsprint sheet prepared in advance with a facsimile of the Multiple Roles Team Chart.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A room large enough so that the team members can work comfortably.

Process

1. The facilitator explains the goals of the activity.
2. Each team member is given a copy of the Multiple Roles Work Sheet, a clipboard or other portable writing surface, and a pencil; each then is instructed to work independently to assign names of team members to the roles listed. (Five minutes.)

3. The facilitator reconvenes the total team and distributes copies of the Multiple Roles Team Chart. The facilitator posts the newsprint sheet that had been prepared previously, polls the team members for the names they assigned to each role, and records this information on newsprint. The members of the team reach consensus on which team members fill which roles by discussing each role and the names proposed to fill it or by selecting the three names mentioned most often. The facilitator fills in the newsprint chart while the team members fill in their copies of the Multiple Roles Team Chart. (Forty minutes.)

4. The facilitator gives a brief lecturette based on the Multiple Roles Theory Sheet. The facilitator focuses on (a) the variety of roles needed for effective team functioning, (b) the nature of roles (team-task or team-building), and (c) the orientation of roles (direction, guidance, or evaluation). The facilitator also introduces the idea of nonteam roles, those that block team functioning. Following the lecturette, the facilitator distributes copies of the Multiple Roles Theory Sheet. (Fifteen minutes.)

5. The facilitator leads a discussion based on the following questions:
   - What were your feelings and thoughts as you assigned names to the various roles?
   - Which roles on your team are filled by several people? Which roles are filled by one person or by no one? What does that suggest to you?
   - How are the roles distributed? What kind of balance is there between team-task roles and team-building roles? What kind of balance is there between direction, guidance, and evaluation?
   - How do these roles help the team to accomplish its goals? What particular strengths or areas for improvement do you see?

   (Fifteen minutes.)

6. The team members are asked to work together to devise an action plan for the team for ways to fill roles that currently are unfilled or underfilled. The facilitator or a designated team member records the action plan on newsprint. (Thirty minutes.)

7. The facilitator reviews the highlights of the action plan and makes arrangements with the team to have the plan reproduced and distributed to all members of the team. (Ten minutes.)

**Variations**

- This activity may be used to introduce a team-building session. The data from the activity then serve as a basis for further work during the session.
- The team members may choose to create two separate action plans: one for enhancing team-task and team-building roles and another for reducing nonteam roles.
- Individuals can develop their own personal action plans for increasing their role functioning.
- The work sheet can be used as an observer sheet in a team meeting to determine the team’s functioning in an actual work situation.

Submitted by Manish Nandy.
MULTIPLE ROLES WORK SHEET

Instructions: The following statements describe roles of team members. Read each statement; consider the members of your team and write in the first blank line the name of the person who best or most often fills that role. If another team member also fills that role, list that person’s name in the second blank. If a third team member also fills that role, write his or her name in the third blank. If no one on your team fills that role, do not write anything in the blanks. One person’s name may be listed as many times as you feel is appropriate; do not forget to include yourself when you respond to the statements.

A. Answers questions and supplies data.
   1. ______________  2. ____________________  3. ___________________

B. Provides support and encouragement.
   1. ______________  2. ____________________  3. ___________________

C. Links and integrates data.
   1. ______________  2. ____________________  3. ___________________

D. Works for harmony and compromise.
   1. ______________  2. ____________________  3. ___________________

E. Maintains rules and discipline.
   1. ______________  2. ____________________  3. ___________________

F. Keeps making sure relations are working.
   1. ______________  2. ____________________  3. ___________________

G. Asks questions and seeks data.
   1. ______________  2. ____________________  3. ___________________
H. Initiates team norms and style.
   1. ______________ 2. ________________ 3. ________________

I. Elucidates and analyzes data.
   1. ______________ 2. ________________ 3. ________________

J. Helps and encourages the quiet members.
   1. ______________ 2. ________________ 3. ________________

K. Assesses and analyzes relevant data.
   1. ______________ 2. ________________ 3. ________________

L. Periodically checks and corrects people.
   1. ______________ 2. ________________ 3. ________________

MULTIPLE ROLES TEAM CHART

Instructions: Below are listed titles of roles that correspond to the statements on the Multiple Roles Work Sheet. Your facilitator will help your team reach consensus on who fills which roles. Then you will be instructed to write in names on the team chart.

A. Instructor: Answers questions and supplies data.
B. Follower: Provides support and encouragement.
C. Coordinator: Links and integrates data.
D. Peacemaker: Works for harmony and compromise.
E. Gatekeeper: Maintains rules and discipline.
F. Monitor: Keeps making sure relations are working.
G. Pioneer: Asks questions and seeks data.
H. Leader: Initiates team norms and style.
   I. Commentator: Elucidates and analyzes data.
J. Promoter: Helps and encourages the quiet members.
K. Critic: Assesses and analyzes relevant data.
L. Reviewer: Periodically checks and corrects people.
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<td>Gatekeeper</td>
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MULTIPLE ROLES THEORY SHEET

Multiple Roles in Groups

People perform multiple roles in groups; one way to enhance their contributions to groups is to help them to understand the roles available to them and the roles they fill. Taking and fulfilling all the roles necessary to group functioning can help to enhance the group’s performance. As some members engage in a wider variety of roles, other members are encouraged to do the same, thus increasing contributions to the group.

The Nature of Group Roles

The answer to “What are the roles one performs in a group?” becomes clearer if the question is phrased “How can one help the group to do what it has to do?” For example, Frederick Winslow Taylor (1967) studied a group of workers at Bethlehem Steel whose task was to load pig iron on railway wagons. In this situation, one way in which a worker could have contributed was to personally load a large heap of pig iron on the wagon, thus reducing the load of others and advancing the work of the group. However, this person might have contributed as much or more if, instead of doing it personally, he or she had persuaded a brawnier member of the group to do so. The first person would then have been free to focus energy on some other activity for which he or she was better suited, such as reallocating tasks in the group according to the members’ physical capacity.

A quite different but equally worthwhile contribution would be to get the group members to sit down together to discuss common problems of productivity and to agree on a mutually acceptable system of task reallocation. The long-range impact of such a contribution might exceed that of the more visible contribution. Contributions to a group can come in two fundamental forms: direct contributions that help to do the group’s work (group-task roles) and indirect contributions that strengthen the group that does the work (group-building roles).

Group-Task Roles

Any role that advances the group’s work directly is called a group-task role. Such a role may involve the action of running a machine and turning out a product, the indirect action of preparing and setting up the machine, or the more indirect action of ordering the purchase of a machine. Originating an idea that improved one of these three activities also would qualify as a group-task activity.

Group-Building Roles

Group-building roles help to build and strengthen the group and thus contribute to its performance. Such roles may involve promoting good interpersonal relations among colleagues or reconciling warring adversaries in the group. What qualifies these
activities as group-building is their tendency to make the group internally more viable and therefore better able to address its tasks.

Nongroup Roles

Often people in a group act in nongroup roles, which do not contribute to the performance of the group. Such roles might be to fail to strengthen the group, such as not taking an active interest in the undertaking of the group. Alternatively, they may actually weaken or harm the group, such as slowing down work or obstructing the group’s progress entirely by rigid adherence to a dogmatic opinion.

The Orientation of Group Roles

Another way of looking at group roles focuses not on their nature but on their orientation. Whether they serve to build the group or to advance its work, roles provide direction, guidance, or evaluation. Roles provide direction when they help the group to identify the way it should or should not go; roles provide guidance when they give signals that enable the group to move forward; and roles provide evaluation when they help the group to see clearly how well or poorly it has performed in the past.

Direction

Providing direction in group-task roles means raising appropriate questions or responding with relevant answers, supplying needed information or formulating the need for such information. For instance, one may augment the group’s sense of direction by saying, “Before we start working on this project, let me share some background data I gathered on a previous project similar to this one.” Alternatively, a person might ask, “Wouldn’t it be a good idea if someone who worked on a previous project similar to this one shared his or her experiences?”

Providing direction in group building means taking the lead in establishing group norms and style as well as supporting and encouraging their establishment. For instance, a member may provide useful guidance to the group by declaring at the start, “I suggest we make the important decisions by consensus rather than by majority rule, even if it takes more time, because I feel we should carry everybody with us.” A person might announce, “I strongly agree with you: We should try for the best groupwork among us and we should deal with one another fairly and frankly.” Such comments set the trend in building up the group in a particular way.

Guidance

Providing guidance in group-task roles means clarifying answers someone has provided, analyzing information for greater clarity, linking or integrating data received from one or more sources, or building on others’ ideas to develop more acceptable ideas. Typically, a group member may say, “It would be helpful if you explained your idea a little more,” or “Let me expand on that idea and tell you what it will mean in terms of
our budget.” Alternatively, one may provide guidance by commenting, “I think that either of the options suggested would serve our need, and I suggest we try out both.” Even rejecting another’s idea can provide guidance if some explanation that helps to carry the group’s work forward is offered.

Providing guidance in group building may take the form of supporting someone, bringing in and promoting quiet or diffident members, and combining and harmonizing widely different perceptions, attitudes, and values. For example, one may say, “I like that idea and I am all for it,” or “We don’t seem to have heard much from Bob and Rita, and I for one would like to know their views,” or “We seem to have very different ideas about this, but I see that we all agree that the current situation is unacceptable.”

Evaluation

Providing evaluation in group-task roles means assessing the work the group has been doing, including the data, the analyses, and the discussions based on them, as well as reviewing the work rules and procedures guiding the group’s activity so far. For example, a group member may helpfully observe, “I think we are giving disproportionate importance to last year’s results, and we should change that by taking into account the results of the last five years.” Or one may comment, “I think we have done well so far by looking at the official figures very critically, and we should continue to proceed cautiously.”

Providing evaluation in the context of group building means periodically gauging the state of interpersonal relations, correcting what is seen to be weakening the group, and encouraging members to act in ways more constructive of a group spirit. A member may say, “I think we need to be more respectful of one another’s views,” or point out, “I have a feeling that we have not been able to get everybody on the committee fully committed to this change, and we ought to address that problem first of all.”

The concepts of role orientation can be applied even to the nongroup roles. Some ways of acting particularly distract the group’s sense of direction, such as attacking people instead of ideas or blocking the group by irrationally insisting on a personally favored notion. Other ways are more destructive of group guidance, such as wanting to dominate the proceedings, or of the evaluation activities, such as being cynical and not caring about the outcome.

One practical way to improve the performance of a group is to ask these questions: In which areas does the group’s performance fall short of its requirements or expectations? In which roles does the group need improvement most acutely? Once group members understand roles, they can analyze the group and change their behaviors to meet its needs better. The grid illustrated in Figure 1 depicts the eighteen roles available within a group; this grid can serve as a tool for individuals as well as a collective change plan. For this reason, it is helpful to understand why people play certain roles.
**Repertoire of Roles**

People with a strong group-task tendency often consider acting in group-building roles to be distracting. Because their attention is riveted to carrying the work forward, they may disdain references to people’s feelings as irrelevant. Conversely, people with a strong group-building orientation frequently regard people who are operating in group-task roles as insensitive and thoughtless about human issues. They would prefer to temper their colleagues’ work enthusiasm with a greater responsiveness to human concerns. The advantage of knowing and understanding a wider set of roles is seeing the utility of both kinds of roles. Also, as both types learn to appreciate each other’s roles and over time stray across the boundaries, sharply delineated identities start to dissolve and distinctions gradually fade, creating an opportunity for a more cohesive group to be more productive in whatever it attempts to do.

Optimal group performance requires a repertoire of roles from its members. It is impractical and unnecessary for every member to play all the roles in every group.

<table>
<thead>
<tr>
<th>GROUP-TASK ROLES</th>
<th>GROUP-BUILDING ROLES</th>
<th>NONGROUP ROLES</th>
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<tbody>
<tr>
<td><strong>DIRECTION</strong></td>
<td></td>
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<tr>
<td>Pioneer</td>
<td>Leader</td>
<td>Aggressor</td>
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<tr>
<td>Asks questions</td>
<td>Initiates group</td>
<td>Attacks without</td>
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<td>and seeks data</td>
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<td>constructive</td>
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<td></td>
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<td>purpose</td>
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<td>Instructor</td>
<td>Follower</td>
<td>Blocker</td>
</tr>
<tr>
<td>Answers questions</td>
<td>Provides support</td>
<td>Blocks</td>
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<td>and supplies data</td>
<td>and encouragement</td>
<td>stubbornly or</td>
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<td>unreasonably</td>
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<td><strong>GUIDANCE</strong></td>
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<tr>
<td>Commentator</td>
<td>Promoter</td>
<td>Dominator</td>
</tr>
<tr>
<td>Elucidates and</td>
<td>Helps and encourages the quiet members</td>
<td>Likes to prevail in all circumstances</td>
</tr>
<tr>
<td>analyzes data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordinator</td>
<td>Peacemaker</td>
<td>Chauvinist</td>
</tr>
<tr>
<td>Links and integrates data</td>
<td>Works for harmony and compromise</td>
<td>Always decides on the basis of present ideas</td>
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<td><strong>EVALUATION</strong></td>
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<tr>
<td>Critic</td>
<td>Reviewer</td>
<td>Idol</td>
</tr>
<tr>
<td>Assesses and</td>
<td>Periodically checks and corrects people</td>
<td>Wants always to be the center of attention</td>
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<tr>
<td>analyzes relevant data</td>
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<tr>
<td>Gatekeeper</td>
<td>Monitor</td>
<td>Cynic</td>
</tr>
<tr>
<td>Maintains rules and discipline</td>
<td>Keeps making sure relations are working</td>
<td>Does not truly care about the outcome</td>
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**Figure 1. Multiple-Roles Grid**
session; a repertoire of roles instead requires group members to focus on awareness, balance, integration, and responsibility.

**Awareness.** Group members need to be aware of the spectrum of roles that effective group performance requires. Although the relative importance of roles may vary from session to session, all are needed at one time or another; members contribute better when they are conscious of and respond to the needs of the group.

**Balance.** Some members may not choose or be able to play a certain role at a given time; other members then compensate by taking on the required role and meeting the group’s need. This is more likely to happen if all the members have reasonable competence in most of the roles. People always will have varying levels of competence and comfort in different roles; however, versatility of roles among members enables the group to access the resources it needs for optimal functioning.

**Integration.** Although individual roles can be isolated conceptually, group-task or group-building role sets are more descriptive of function. In fact, people tend to think of their group roles (group-task or group-building) as integral units and rarely separate their different strands. By identifying, understanding, and practicing the individual roles they might not have assumed before, their competence in even the accustomed roles grows significantly. They do better what they were doing before, and they better understand and complement what their colleagues do.

**Responsibility.** Many group dysfunctions result when group members implicitly entrust several roles to a nominated or elected chairperson and content themselves with a few limited and seemingly risk-free roles. The first step in change is to realize that no chairperson can perform all roles thoroughly for the group and that these roles will be performed satisfactorily only when all the group members take responsibility for them and develop appropriate skills.

**Summary**

Group work is an operation with many facets. It works best when members take the many roles required to make the operation a success, but they rarely do. Past experience and present inclination induce group members to assume a limited set of roles in which they feel comfortable and competent. The probable loss to group performance is extensive.

The alternative is to help individuals to grasp the multiple roles they can play in groups: both the nature of roles, whether they contribute to the group’s mission or its internal strengthening, and the orientation of roles, whether they provide direction, guidance, or evaluation. Once group members understand these roles (as well as the roles that do not contribute to the group’s functioning), they are on the way to assuming more roles and fulfilling them more effectively. They also better appreciate the roles others take and can make their own performance consistent with that of others. A repertoire of roles empowers them to perform and to make changes.
REFERENCES

ROLE POWER: UNDERSTANDING INFLUENCE

Goals

- To explore the types of power inherent in different roles in group settings.
- To acquaint the team members with various power strategies that can be used in a decision-making process.
- To help the team members to develop an understanding of effective and ineffective uses of power.

Group Size

All members of an ongoing team. This activity requires a minimum of six team members, five to play roles and one to serve as observer; if there are more than six members, the extra team members may be designated as observers.

Time Required

Approximately two hours.

Materials

- A copy of the Role Power Situation Sheet for each team member.
- A set of Role Power Description Sheets for each group: Each set includes one copy of the role description for each of the following roles:
  - Controller;
  - Director of merchandising;
  - Personnel director;
  - Promotion director; and
  - Operations director.
- A copy of the Role Power Public-Knowledge Sheet for each team member.
- A copy of the Role Power Political-Base Sheet for each team member.
- A copy of the Role Power Observer Sheet for each observer.
- A pencil for each observer.
- A clipboard or other portable writing surface for each observer.
**Physical Setting**

A room in which the team can conduct the role play without being interrupted.

**Process**

1. The facilitator informs the team members that they are to be involved in a role play and explains the goals of the activity.
2. Each team member is given a copy of the Role Power Situation Sheet and is asked to read this handout. (Five minutes.)
3. The facilitator assigns the following roles and distributes the corresponding role sheets:
   - Controller;
   - Director of merchandising;
   - Personnel director;
   - Promotion director; and
   - Operations director.

   Each of the remaining members is designated an observer and is given a copy of the Role Power Observer Sheet, a pencil, and a clipboard or other portable writing surface. The observers are asked to read this sheet and to become familiar with their task while the role players study their roles. (Ten minutes.)
4. The facilitator distributes copies of the Role Power Public-Knowledge Sheet to all team members and asks them to read this sheet. (Five minutes.)
5. It is explained that the role players are to complete the task described in the situation sheet. The facilitator elicits and answers questions about this task, advises the role players that they must maintain their roles during the role play, and then instructs the role players to begin their meeting.
6. After thirty minutes the facilitator interrupts the role players and gives each team member a copy of the Role Power Political-Base Sheet. The facilitator explains that all team members are told to read this sheet and then the role players are to continue their meeting.
7. After twenty minutes the facilitator stops the role play. The observers are asked to report observations, and the role players are asked to share their reactions to these observations. (Twenty minutes.)
8. The facilitator leads a concluding discussion by asking the following questions:
   - How did exercising the power of your role affect your feelings about yourself and the other members of your team? How did it affect your perspective on the situation and your problem-solving behavior?
- How did the various power roles and strategies affect the outcome?
- What could you have done differently to use your power more effectively?
- What can be generalized about the use of power in an organization?
- How can you use power or your understanding of power more effectively back home?

Variations

- The political-base sheet may be eliminated.
- A role sheet may be created for the owner, who either may be present for the entire meeting or may return while the meeting is in progress. If this variation is selected, the situation sheet may need to be altered.

Submitted by Patrick E. Doyle.
ROLE POWER SITUATION SHEET

You are employed by a large chain of retail clothing stores in your city. The company is privately owned, and the owner, Terry Walsh, takes an active part in its management. The most appropriate description of Terry’s management style would be that of a benevolent autocrat. It is clearly understood by all employees that the owner makes the final judgment on any major decision.

In addition, Terry uses a parental approach to dealing with the employees of the organization. This approach seems to have worked thus far; competitors have been unionized, but this operation remains without a union.

However, in recent months the performance of the various stores has deteriorated, primarily due to the poor economic condition of the marketplace. A meeting has been called to address this problem, and you have been asked to attend. The owner plans to discuss the areas in which significant cutbacks could be made in the organization.

As the meeting begins, the owner is called away on a personal emergency. Terry tells the group, “You know why you are here. I won’t be back today, but I want you to proceed without me. I’ll expect your recommendations on my desk by tomorrow morning.”
ROLE POWER DESCRIPTION SHEET: CONTROLLER

The following information is supplied so that you can fulfill your role in the role play. You may use any of this information in any way you wish.

Public Knowledge

You are the individual who is ultimately responsible for controlling and safeguarding the company’s financial assets. Although you are not the owner of this large retail operation, it is commonly accepted within the company that you have the final judgment on the acceptance or rejection of any budget or major financial decision.

Private Knowledge

1. You are not convinced that the stores are operating as efficiently as they could. You believe that they still have buffer zones in their budgets, but you are unable to prove this belief.

2. You feel that the current economic environment is going to cause a decrease in sales and an increase in inventory surplus if the organization’s original merchandise plans are adhered to. You want to implement a program to cut the inventory allotment.

Your Political Base

Although you have the owner’s confidence as well as the authority to legislate changes, you realize that traditionally the merchandising arm of the organization has had significant power to influence the decision-making process. Because of the implied power of the merchandising arm, you are concerned about and want to avoid a direct confrontation during the meeting.
ROLE POWER DESCRIPTION SHEET: DIRECTOR OF MERCHANDISING

The following information is supplied so that you can fulfill your role in the role play. You may use any of this information in any way you wish.

Public Knowledge

As the director of merchandising, you are ultimately responsible for all buying and selling in the organization. You are under constant pressure from your subordinates to increase inventory allotments as well as the wage dollars available to hire salespeople.

Private Knowledge

1. You are beginning to accept the idea that perhaps your subordinates are right. Despite the economic situation, you may have cut back too far on inventory allotments. Even you have noticed that the salespeople in the various stores are becoming discouraged because there is insufficient depth in the merchandise. They complain that when they finally have convinced customers to buy, they cannot find the right sizes or colors of merchandise.

2. The service department is receiving increasing numbers of complaints from customers who have not been able to find salespeople to wait on them.

Your Political Base

Although you are fully aware of the fact that the controller ultimately has power over you, you do not readily accept the situation. You know that the owner has confidence in you and if it came to a final showdown, might support you. However, you are not totally sure of this.

You are convinced that in a retail organization the merchandising arm should be the most powerful because merchandising is “where the action is” and where profits are made or lost.
ROLE POWER DESCRIPTION SHEET: PERSONNEL DIRECTOR

The following information is supplied so that you can fulfill your role in the role play. You may use any of this information in any way you wish.

Public Knowledge

You are responsible for the recruitment, employment, and training of all employees. In addition, you are in charge of training future managers of the organization and evaluating their career development. It is also your responsibility to keep the company competitive in wages.

Your organization does not have a union, and you do not wish one to gain a foothold.

Private Knowledge

1. You feel that the adverse economic conditions are having negative effects on company morale. For example, several employees have just completed the management-training program and are now ready for supervisory positions, but no positions are available. A new group of trainees is about to begin the program.

2. From your point of view, the real problem lies in the fact that the director of merchandising is not forcing the department managers to practice close enough supervision of their operations. Each of these managers is responsible for the merchandising in one department of one of the stores. Too frequently these managers are away from the sales floors; either they are out of the stores during peak business hours, or they choose to run their departments from their offices.

3. Recently you have put a lot of effort into developing new training packages and evaluation procedures. Just when you were ready to institute these programs, you heard about the possibility of financial cutbacks. To you this means staff cutbacks, and if these occur, you feel that your new programs might never be implemented because you would no longer have the personnel to run them.

Your Political Base

You feel that you have less power than the director of merchandising and the controller. Although the owner listens to you and has confidence in you, you are convinced that in a direct confrontation with the director of merchandising, in particular, you would lose.

Cancellation of your new programs would further erode whatever power you have.
ROLE POWER DESCRIPTION SHEET: PROMOTION DIRECTOR

The following information is supplied so that you can fulfill your role in the role play. You may use any of this information in any way you wish.

Public Knowledge

As the promotion director, you are responsible for advertising, visual merchandising, and the total image that the stores project. The image you are attempting to build for your organization is one of current fashion, with some conservatism; you do not see the organization as a fashion leader, but as a fairly close follower of current trends. You are attempting to attract upper-income individuals as customers.

Private Knowledge

Although the image of a local retailer is determined by many factors, such as the selection of merchandise, it is built primarily on “institutional” advertising (emphasizing the advantages of the facility and its location) as opposed to special promotions of merchandise.

However, institutional advertisements do not generate the immediate sales that special promotions do. As a result you are under constant pressure from the department managers in the individual stores (who are judged on the basis of sales) to direct more and more of your advertising dollars to special promotions.

You remain convinced of the importance of the long-run benefits of institutional advertising. You know that it takes years to build an appropriate image, but very little time to destroy one. However, you also know that when cutbacks come, the pressure will increase to generate sales and to lower inventory levels through a series of “specials.” You feel that this approach could seriously damage the company’s image and make it look like a massive “bargain basement.”

Your Political Base

The owner has confidence in you and is pleased with the company’s present image and with your efforts to continue it. But you have very limited access to the owner and realize that you are not considered to be on the same level as the controller or the director of merchandising.

You are aware that the employees who work for you are frequently treated as “outsiders” because of the creative nature of their work. It is also obvious that your subordinates are seen as lacking in discipline.
ROLE POWER DESCRIPTION SHEET: OPERATIONS DIRECTOR

The following information is supplied so that you can fulfill your role in the role play. You may use any of this information in any way you wish.

**Public Knowledge**

You are responsible for all functions not directly related to finance, personnel, and merchandising. This includes such things as store maintenance, workroom maintenance, security, and warehousing. The most pressing problems you have are the following:

1. *Store Maintenance.* Not only do you have the problems of day-to-day maintenance and emergencies (such as breakdowns of elevators and escalators), but two other sources of difficulty are also bothering you:
   - The department managers in the individual stores are moving display units whenever they desire; and
   - You are constantly receiving requests either to put up temporary walls to isolate boutiques or to tear down walls to create more space.

2. *Security.* With the onset of adverse economic conditions, shoplifting on the part of both the public and the employees is rapidly increasing. You seem unable to control the situation.

**Private Knowledge**

Although inflation is running at approximately 11 percent, the inflation rate for equipment and supplies in your area (such as oil) is running closer to 22 percent. You personally believe that unless budget increases are forthcoming, you will not be able to maintain the company trucks and other equipment properly.

**Your Political Base**

You have a low profile in the organization, but your power base is strong. For one thing, the owner has confidence in you. In addition, some of your power is supplied by external sources, such as safety legislation and fire-prevention regulations. The employees in general are less well acquainted with your area than with others and, therefore, tend to accept your statements as valid. However, your power is restricted in one sense: People in the company accept your word as fact when it pertains to operations, but would be surprised if you ventured opinions on matters outside your area. The power of the others attending the meeting is not restricted in this way; for example, they would feel free to comment on issues involving operations.
ROLE POWER PUBLIC-KNOWLEDGE SHEET

The following information is public knowledge about the people attending this meeting.

**Controller**
This individual is ultimately responsible for controlling and safeguarding the company’s financial assets. Although this person is not the owner of this large retail operation, it is commonly accepted within the company that the controller has the final judgment on the acceptance or rejection of any budget or major financial decision.

**Director of Merchandising**
The director of merchandising is ultimately responsible for all buying and selling in the organization. This person is under constant pressure from subordinates to increase stock allotments as well as the wage dollars available to hire salespeople.

**Personnel Director**
This individual is responsible for the recruitment, employment, and training of all employees. In addition, this person is in charge of training future managers of the organization and evaluating their career development. It is also the responsibility of the personnel director to keep the company competitive in wages. The company does not have a union, and this director does not want one to gain a foothold.

**Promotion Director**
The promotion director is responsible for advertising, visual merchandising, and the total image that the stores project. The image that this person is attempting to build for the organization is one of current fashion, with some conservatism; the promotion director does not see the organization as a fashion leader, but as a fairly close follower of current trends. This individual is attempting to attract upper-income individuals as customers.

**Operations Director**
This person is responsible for all functions not directly related to finance, personnel, and merchandising. This includes such things as store maintenance, workroom maintenance, security, and warehousing. The most pressing problems facing the operations director are the following:

1. **Store Maintenance.** Daily maintenance and emergencies are a concern, and two situations are particularly bothersome:
   - The department managers in the individual stores are moving display units whenever they desire; and
The director constantly receives requests either to put up temporary walls to isolate boutiques or to tear down walls to create more space.

2. Security. With the onset of adverse economic conditions, shoplifting on the part of both the public and the employees is rapidly increasing. The director seems unable to control the situation.
ROLE POWER POLITICAL-BASE SHEET

The following is information about the political base of each person attending the meeting. The owner of the company has confidence in all of these people.

**Controller**

The controller has the authority to legislate changes, but realizes that traditionally the merchandising arm of the organization has had significant power to influence the decision-making process. Because of the implied power of the merchandising arm, the controller is concerned about and wants to avoid a direct confrontation during the meeting.

**Director of Merchandising**

The director of merchandising is fully aware of the fact that the controller ultimately has greater power, but does not readily accept this situation. If it came to a showdown, the director feels (but is not certain) that the owner might side against the controller.

The director is convinced that in a retail organization the merchandising arm should be the most powerful because merchandising is “where the action is” and where profits are made or lost.

**Personnel Director**

The personnel director feels that both the controller and the director of merchandising have greater power and that in a direct confrontation with the director of merchandising, in particular, the personnel director would definitely lose.

This individual has recently put a lot of effort into developing new training packages and evaluation procedures. Cancellation of these programs would further erode whatever power the personnel director has.

**Promotion Director**

The promotion director feels that the owner is pleased with the company’s present image and with the director’s efforts to continue it. However, this person has very limited access to the owner and realizes that the owner does not consider the promotion director to be on the same level as the controller or the director of merchandising.

This individual is aware that the employees who work in the area of promotion are frequently treated as “outsiders” because of the creative nature of their work. It is also obvious to this person that these employees are seen as lacking in discipline.

**Operations Director**

The operations director has a low profile but a strong power base. Some of this power is supplied by external sources, such as safety legislation and fire-prevention regulations.
The employees are less well acquainted with the area of operations than with others and, therefore, tend to accept the director’s statements as valid. However, this power is restricted in one sense: People in the company accept the director’s word as fact when it pertains to operations, but would be surprised if this person ventured opinions on matters outside this area. The power of the others attending the meeting is not restricted in this way; for example, they would feel free to comment on issues involving operations.
ROLE POWER OBSERVER SHEET

As the role play progresses, watch and listen closely and answer the following questions. Afterward you will be asked to share your answers with your team.

1. How was power demonstrated during the role play?

2. Who seemed to be the most powerful member of the role-play group? What did this person say or do to gain and maintain power?

3. What strategies did each member use to act out his or her power?

4. How effectively was power used to complete the task assigned to the group? How did it hinder the completion of the task?
KALEIDOSCOPE:
TEAM BUILDING THROUGH ROLE EXPANSION

Goals
- To allow members of a team to clarify their roles and to give and receive feedback about their existing and potential contributions to the team.
- To promote team building through self-disclosure, feedback, and commitment among team members.
- To widen the team members’ views of one another’s abilities and valuable qualities.

Group Size
All members of an ongoing team.

Time Required
Two hours and twenty minutes to approximately six hours. (The time required varies according to team size. A four-member team can complete the activity in approximately three hours, but a ten-member team requires approximately six hours. A team with more than ten members should be accommodated in two sessions, with all members attending each session. See step 3 for time required per team member.)

Materials
- A copy of the Kaleidoscope Work Sheet for each team member.
- A pencil for each team member.
- A clipboard or other portable writing surface for each team member.

Physical Setting
A room with chairs arranged in a circle so that the team members can see one another during the activity.

Process
1. The facilitator explains the goals of the activity.
2. Each team member is given a copy of the Kaleidoscope Work Sheet, a pencil, and a clipboard or other portable writing surface and is asked to complete the work sheet. The facilitator provides the following examples of abilities and/or qualities that are assets in jobs:
   - A medical researcher might state that he or she is detail oriented and has an ability to organize data effectively; and
A screenwriter might state that he or she has *a lively imagination* and *an ability to write realistic dialogue*.

(Twenty minutes).

3. After all team members have completed their work sheets, they are asked to take turns sharing the contents of these sheets. The facilitator explains the procedure as follows:

- While one member is sharing, the rest of the team listens carefully.
- After the member reads his or her response to item 1 on the work sheet, the other team members ask for any necessary clarification and state any reactions that might be useful as feedback.
- This procedure is followed until all six items have been reviewed and the other team members have expressed whatever commitments they are willing to make regarding item 6. In addition, when providing feedback concerning the content of items 1 and 2, the other team members suggest any abilities and/or qualities that have not been listed.

The facilitator encourages each member to take notes while he or she is receiving feedback. (Thirty minutes per team member.)

4. The facilitator leads a concluding discussion by asking the following questions:

- What was your reaction to sharing your used strengths, your unused strengths, and your ideal picture of your job?
- How do you feel about your chances for turning your ideal picture of your job into reality?
- How can you evaluate your own progress toward realizing your ideal picture of your job?
- What did you learn about yourself as a member of this team?
- What did you learn about your fellow team members?
- How might this activity affect your future relationships with your fellow team members?
- How can the entire team evaluate the impact of this activity?

(Twenty minutes.)

5. Each team member is instructed to keep his or her work sheet to refer to from time to time and to bring to a follow-up session to be held in a few months. The facilitator states that during this session progress will be discussed and other plans and commitments may be made.
Variations

- The facilitator may begin the activity with the presentation and discussion of a visual aid depicting each member’s current role and the interrelationship of the various roles.
- After step 4 the team members may engage in a contracting activity, planning to take some steps toward the ideal before the team next meets.
- After step 4 the team members may work individually to transform their wishes and their fellow members’ feedback into written job descriptions, which could then be used at the follow-up session.

Submitted by Carlo E. Cetti and Mary Kirkpatrick Craig.
KALEIDOSCOPE WORK SHEET

1. List two abilities and/or qualities that you possess that are assets to you in your present job.

2. List two valuable abilities and/or qualities that you possess but are currently not using in your job.

3. What is your ideal picture of your job and your role in this team? How would this ideal incorporate your unused abilities and/or qualities?

4. What positive contributions could you make to this team by actualizing some of the aspects of your ideal picture of your job?

5. What aspects of your ideal picture of your job can you turn into reality? What specific steps can you take? What might help you as you try to take these steps? What might hinder you?

6. How can your fellow team members help you to capitalize on your strengths and to actualize at least some parts of your ideal picture?
BASEBALL GAME:
TEAM-MEMBERSHIP FUNCTIONS

Goals
- To help each member of a new or temporary team gain insight into how he or she is perceived by the other members.
- To offer the team members an opportunity to study a variety of team-member functions.
- To acquaint the team members with some of the dynamics of team problem solving.
- To introduce a novel way of characterizing team-member roles.

Group Size
All members of an ongoing team.

Time Required
Approximately three hours.

Materials
- A copy of the Baseball Game Role-Description Sheet for each team member.
- A copy of the Baseball Game Problem Sheet for each team member.
- A copy of the Baseball Game Answer Sheet for each team member.
- A copy of the Baseball Game Impression Sheet for each team member.
- Blank paper and a pencil for each team member.

Physical Setting
A room with a table and chairs. If a table is not available, the facilitator should provide clipboards or other portable writing surfaces.

Process
1. The facilitator introduces the activity and explains the goals.
2. The facilitator distributes copies of the Baseball Game Role-Description Sheet and asks the team members to read the role descriptions on the sheet. (Five minutes.)
3. The facilitator leads a discussion of the team-member functions covered on the role-description sheet, ensuring that the team members understand these functions. (Fifteen minutes.)
4. The facilitator distributes copies of the Baseball Game Problem Sheet, blank paper, and pencils. After announcing that the team members have forty-five minutes in which to complete the problem-solving task, the facilitator asks them to begin. (Forty-five minutes.)

5. At the end of the forty-five minutes or when the team has completed the task, the facilitator distributes copies of the Baseball Game Answer Sheet. The team members compare their answers with the correct answers. (Ten minutes.)

6. The facilitator distributes copies of the Baseball Game Impression Sheet and instructs the team members to spend ten minutes completing the sheet on the basis of their perceptions about one another’s behavior during the problem-solving task. (Ten minutes.)

7. The team members are instructed to privately predict which of the roles the other members assigned to them. (Five minutes.)

8. The facilitator leads a discussion of the team members’ impressions of one another, based on their responses to the impression sheet. The facilitator elicits comments about how these roles were demonstrated by the team members during the problem-solving task. (Thirty minutes.)

9. The team members are asked to discuss their predictions of roles that others would assign to them as well as their reactions to the actual role assignments that were made and the feedback they received. (Fifteen minutes.)

10. The facilitator leads a discussion of the importance of various team-member functions in the problem-solving process. (Twenty minutes.)

11. The facilitator asks the following questions:
   - What have you learned about team problem solving?
   - What have you learned about yourself as a team member?
   - What have you learned about your fellow team members?
   - How can you use what you have learned as you work with this team?
   - What would you like to say to the other team members at this time?
BASEBALL GAME ROLE-DESCRIPTION SHEET

Umpire
A good umpire helps the team members to work and participate peacefully. He or she often serves as both a mediator and an expeditor. As a mediator the umpire conciliates differences in points of view and seeks compromise solutions. As an expeditor the umpire keeps communication channels open by facilitating the comments of the two opposing sides.

If the umpire is a designated leader, he or she has the authority to administer all rules and to enforce penalties. Thus the umpire is cognizant of the procedures and rules by which the team functions.

Pitcher
The pitcher is the person who does the talking and often can determine the task outcome and direction of the team’s movement. There are many different types of pitchers, and any member of the team can serve in this role. The pitcher’s first job is to make sure that all other members are attentive and working on the task.

The pitcher also serves as a diagnoser and a giver of information or opinions. As a diagnoser the pitcher determines the problem’s source and both the supporting and resisting factors. In giving information or an opinion, the pitcher helps produce data that are pertinent to the team’s problem-solving processes.

Catcher
The catcher listens to all members, elicits pertinent ideas, classifies the relationships between ideas and suggestions, and draws together the efforts of members or subgroups. In a task role the catcher is a coordinator-integrator.

The catcher is in charge of maintenance and strategy. He or she also serves occasionally as an information or opinion seeker by asking other members for additional facts. Thus the catcher calls forth ideas and keeps the rest of the team informed about the team’s progress.

Fielder
This player fields the ideas made by other team members, helps cover their positions, and supports their ideas. The fielder quickly assesses situations, pulls together all ideas and suggestions, and restates and clarifies these for the team. From a task standpoint the fielder is an energizer, known for prodding the team to a higher quality of participation. The fielder is alert and always ready to participate—sensitive to the atmosphere and climate of the team, to the direction of the flow of ideas.
Batter

A good batter observes the team in process, watching others and consciously determining how to influence the process in the most advantageous way.

The best batters have a sense for the flow of discussion. They have a good mental attitude; accurate timing on the question-answer sequence; and confidence that their statements will be instructional, correct, and accepted.

Coach

The coach expedites the team process by performing needed routine tasks, such as distributing equipment and materials, arranging the physical environment (for example, tables and chairs), and keeping time.

The coach serves as an advisor, not as an authority or disciplinarian. The coach offers positive feedback and praise; attempts to create a feeling of trust and respect; and accepts each member’s contribution, helping each to produce at his or her highest level of efficiency.

The coach’s role in building and maintaining the team is to keep the team focused on evaluating alternatives and reaching final decisions.

Scorekeeper

The scorekeeper serves as a recorder, taking minutes, writing down suggestions, and noting decisions.

Team Clown

The team clown serves a nonfunctional role. He or she is apt to joke, mimic, or engage in other disruptive acts at inopportune times. Some people resent the clown’s display of noninvolvement in the team’s processes.

Hothead

The hothead interferes with straight thinking and tends to throw fellow players off balance. He or she plays a nonfunctional role and becomes aggressive, criticizes or blames others, shows hostility against individuals or the team, is envious of the credit that other members receive, and often deflates the egos of other members.
BASEBALL GAME PROBLEM SHEET

Instructions: Nine men play the positions on the baseball team involved in this problem: Duncan, Winters, Perry, Banks, Dixon, Billings, Woods, Johnson, and Lynch. Your team’s task is to determine from the following data the position played by each. Record your team answers at the bottom of the page.

1. The second baseman beat Johnson, Duncan, Billings, and the catcher at golf.
2. Lynch and Duncan each won $50 playing cards with the pitcher.
3. Johnson has an apartment across the hall from the third baseman.
4. The outfielders bowl with Banks in their spare time.
5. Winters is taller than Billings; Woods is shorter than Billings. Each of them weighs more than the third baseman.
6. Duncan, Perry, and the shortstop lost $300 each betting on the horses.
7. The catcher has three daughters; the third baseman has two sons; Dixon is being sued for divorce.
8. Perry dislikes the catcher and lives with his sister.
9. One of the outfield positions is played by either Perry or Woods.
10. The center fielder is taller than the right fielder.
11. The pitcher’s wife is the third baseman’s sister.
12. Dixon is taller than the infielders and the battery with the exception of Johnson, Lynch, and Perry.
13. Banks’s sister is engaged to the second baseman.
14. The third baseman, the shortstop, and Billings made $150 speculating on commodities.
15. Four members of the team are married. Winters, Banks, Duncan, the right fielder, and the center fielder are bachelors.

Catcher _________________________ Shortstop _________________________
Pitcher _________________________ Left Fielder _________________________
First Baseman _________________ Center Fielder _________________________
Second Baseman ________________ Right Fielder _________________________
Third Baseman _________________
BASEBALL GAME ANSWER SHEET

Catcher ___________ Lynch ___________
Pitcher ___________ Johnson ___________
First Baseman _______ Duncan __________
Second Baseman ______ Winters __________
Third Baseman _______ Perry ____________
Shortstop __________ Banks ____________
Left Fielder _________ Dixon ____________
Center Fielder ________ Billings __________
Right Fielder _________ Woods ____________

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BASEBALL GAME IMPRESSION SHEET

Instructions: Write the names of the members of your team in the spaces that correspond to the roles you think they played in your team. Any team member may be listed in more than one position. You should also list yourself.

Umpire _______________________________________________________________
Pitcher _______________________________________________________________
Catcher _______________________________________________________________
Fielder _______________________________________________________________
Batter _______________________________________________________________
Coach _______________________________________________________________
Scorekeeper __________________________________________________________
Team Clown __________________________________________________________
Hothead ______________________________________________________________
ROLE CLARIFICATION:
DEVELOPING A TEAM NORM

Goals

- To clarify each team member’s expectations of the other members’ roles as well as each member’s conception of his or her own role.
- To promote renegotiation of role responsibilities within a team.
- To teach a process of role adjustment that can become a team norm.

Group Size

All members of an ongoing team.

Time Required

A minimum of three hours. The time required varies according to the number of team members who choose to complete the role-clarification process of steps 4 through 9.

Materials

- Blank paper and a pencil for each team member.
- Newsprint and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A private room with wall space for posting newsprint. Chairs and writing surfaces should be provided for the team members.

Process

1. The facilitator presents a lecturette on the four aspects of role (Allport, 1961):
   - Role expectations—what others think a role incumbent is responsible for and how he or she should perform that role;
   - Role conception—what the role incumbent thinks his or her job is and how the role incumbent has been “taught” to do the job;
   - Role acceptance—what the role incumbent is willing to do; and
   - Role behavior—what the role incumbent actually does.
During the course of the lecturette, the facilitator records the four aspects and highlights on newsprint. The list of the four aspects remains posted throughout the activity. (Ten minutes.)

2. The facilitator briefly discusses the goals of the activity and indicates that the team members will be asked to write several sets of notes and that they will be expected to talk about what they write. (Five minutes.)

3. After distributing blank paper and pencils, the facilitator instructs the team members to make notes about their own jobs in terms of the four aspects of role discussed. (Twenty minutes.)

4. The facilitator calls for a volunteer who wants to clarify his or her role within the team. While the other team members make notes on their understanding of this volunteer’s responsibilities, the facilitator briefs the volunteer on the sequence of steps that will follow and elicits and answers the volunteer’s questions. (Ten minutes.)

5. The volunteer states what he or she thinks the other members’ “role expectations” are, and the facilitator lists the key points on newsprint. (Only questions of clarification are allowed from the other team members.)

6. The volunteer then questions the other team members and lists on newsprint their actual expectations. (The facilitator intervenes only to ensure that the volunteer is listening accurately and nondefensively.) (Ten minutes.)

7. The facilitator leads a discussion of the confirmed and inaccurately perceived expectations. (Five to ten minutes.)

8. While the volunteer discusses his or her own “role conception,” the facilitator makes notes on newsprint. (Only questions of clarification are accepted.) (Five minutes.)

9. The facilitator conducts a renegotiation session in which the volunteer makes a new contract with the other team members. (Ten to twenty minutes.)

10. Steps 4 through 9 are repeated with other volunteers.

11. The facilitator leads a discussion of the role-clarification process, emphasizing the need to renegotiate expectations periodically.

Variations

- Step 3 may be assigned as prework for the session.
- To clarify his or her role, a volunteer may choose a subgroup consisting of those team members with whom he or she is most interdependent.
- The entire process may be used as a third-party intervention (for example, in a supervisor-subordinate relationship).
REFERENCE


Submitted by John E. Jones.
POSITION POWER: EXPLORING THE IMPACT OF ROLE CHANGE

Goals
- To explore the effects of power and status on attitudes and performance.
- To become more aware of how changes in the roles of team members affect attitudes and performance.

Group Size
All members of an ongoing team. This activity requires a minimum of eight team members and is more appropriately used with larger teams. During the activity the team is assembled into two or more subgroups of four or five members each.

Time Required
Approximately three hours.

Materials
- A newsprint flip chart and several felt-tipped markers for each subgroup.
- A prize (cash or something else) for the winning subgroup.
- Masking tape for posting newsprint.

Physical Setting
A room that will accommodate all team members for general discussion and provide enough room for the subgroups to work on their task without disturbing one another. A breakout area (room, hallway, etc.) close to the primary meeting room also is needed.

Process
1. The facilitator forms two or more subgroups of four or five members each.
2. The facilitator explains that all subgroups will be working on the same task and that a prize will be awarded to the subgroup that creates the winning product. (This may be a cash prize or whatever the facilitator thinks is appropriate for creating a competitive atmosphere and a reasonable incentive to “win.”)
3. The facilitator explains that the first task for each subgroup is to establish several criteria by which its membership could be reduced by one. The second task for each subgroup is to select one of the criteria that the members are willing to use and to apply it, thus reducing the subgroup’s membership by one person. (Ten minutes.)
4. Each subgroup reports the criterion it used and identifies the member who was excluded from the subgroup. (Five minutes.)

5. The members identified in step 4 are directed to go to the breakout area together to await further instructions from the facilitator. They are asked to discuss their reactions to the activity so far (for example, their feelings about their subgroups’ criteria and about being excluded) while they wait. (If a second facilitator is available, he or she should join the excluded members at this time.)

6. The remaining members of each original subgroup are instructed to select a subgroup manager whose responsibility will be to ensure that the subgroup (a) works in an efficient and effective manner, (b) completes its work in the time allotted, and (c) is ready to present its product for competitive review. (The facilitator stresses selection of the manager by subgroup decision; volunteering to be manager, selecting rotating managers, or doing the task without a manager are to be avoided.) The facilitator announces that the task to be assigned later by the facilitator may be accomplished in any manner deemed appropriate by the subgroup’s manager, but that the manager is the only member who may not work directly on the task. (Ten minutes.)

7. When all subgroups have selected their managers, the facilitator introduces the task by saying that just as major product or service corporations create symbols that attempt to convey their corporate images, levels within an organization also can convey images. Each subgroup is instructed to create one symbol that the members believe best represents the three levels (worker, managerial, and executive) in their organization (or one preferred level can be identified by the facilitator). The facilitator reminds the managers that they are not to work directly on their subgroups’ tasks. The facilitator reinforces the competitive aspect of the task by revealing the prize to be awarded to the subgroup that produces the best product. Each subgroup is supplied with a newsprint flip chart and several felt-tipped markers. The facilitator says that the subgroups’ symbols are to be drawn on the newsprint and that someone from each subgroup later will present, for judging, the subgroup’s symbol and an explanation of what it stands for. The subgroups are allotted twenty-five minutes in which to complete the task. (Thirty minutes.)

8. While the subgroups are working, the facilitator meets with the excluded members in the breakout area and tells them that they now are members of the “executive committee.” The facilitator tells them about the task assigned to the subgroups and informs them that their first task is to establish criteria by which to judge the symbols being created by the subgroups and that later they are to use these criteria to determine the winning symbols. In addition, they are to establish the procedure they will use in awarding the prize. (At this point, the facilitator turns over the prize to the executive committee.) The members of the executive committee are told that when they have completed their first task, they may reenter the work area and observe the subgroups, that only subgroup managers may converse with them, and
that attempts to communicate with them by subgroup members are to be redirected to the subgroup managers.

9. On reentering the work room, the facilitator announces the formation of the executive committee, describes its roles and responsibilities, and informs the subgroup members that only their managers may communicate directly with members of the executive committee.

10. When all subgroups have completed the task, or when time is called, each subgroup’s spokesperson presents its symbol to the executive committee for evaluation. (Two or three minutes for each presentation.)

11. After all presentations have been made, the executive committee meets to determine the winning symbol. While the executive committee is meeting, each subgroup is directed to review its satisfaction with (a) the way in which it worked during the task phase, (b) its final product, and (c) the symbols created by the other subgroup(s). The subgroups are told that they will have fifteen minutes in which to complete their reviews. (Twenty minutes.)

12. A spokesperson for the executive committee describes the criteria used in its evaluation, announces its decision, gives the rationale for the decision, and awards the prize accordingly. (Five minutes.)

13. The facilitator asks the team members to share their reactions to the outcome and to the themes represented in the symbols. (Five minutes.)

14. The facilitator directs the team members to form three different subgroups: (1) one of members who served as executives, (2) one of members who served as managers, and (3) one of members who served as subgroup members. The facilitator asks each of the new subgroups to review what happened during the activity. Because the goal of the activity is to increase awareness of how changes in the roles and status of team members can affect the attitudes, feelings, and performance of other members, discussion questions should focus on both thoughts and feelings experienced during the activity. The following are examples of such questions:

- **For the executives:** What did you experience on being excluded from your original subgroup when designated as a member of the executive committee? What thoughts and feelings did you have about the subgroups while developing evaluation criteria? while doing the judging? while awarding the prize?

- **For the subgroup managers:** What did you experience when being selected as manager? while managing for task accomplishment? How did the members of your subgroup react to you as manager while working on the task?
For the subgroup members: How did you feel about having to exclude a member of your subgroup? about having your subgroup’s symbol judged by that former subgroup member? about competing for a prize? How did you feel about your manager? How did your feelings affect your ability to work productively on your subgroup’s task?
(Twenty minutes.)

15. After the subgroups have discussed these questions, the facilitator solicits a sample of the comments and reactions from each subgroup. (Ten minutes.)

16. The facilitator leads a total-team discussion of the general tendencies and themes in the information reported in the previous step and posts key ideas on newsprint. (Ten minutes.)

17. The facilitator then asks the team members to discuss the implications of these learnings (for example, about issues between workers and managers) from the themes identified during step 16. These implications are posted on newsprint. (Ten minutes.)

18. The team members are then asked to put their learnings into action by developing ideas about what they could do to reduce the potential negative effects of changes in roles within their organization and their team. Major points are listed on newsprint.

**Variations**

- The activity can be simplified by eliminating steps 3 and 4. “Judges” are then selected by the facilitator or by team members using any means they choose, such as nomination or self-selection.

- Competition can be removed from the task by having the “excluded” members form another subgroup (selecting their own manager) and eliminating steps 8, 9, 10, and 11. All subgroups then present their results to one another.
YOURS, MINE, AND OURS: CLARIFYING TEAM RESPONSIBILITIES

Goal

- To assist the team members in clarifying and establishing agreements about which activities are their team’s responsibility and which are the responsibilities of individual members (including the formal leader).

Team Size

All members of an ongoing team. The process works best with a minimum of three members and a maximum of eight members.

Time Required

Approximately three to three and one-half hours for a team with five or six members. The facilitator should add or subtract ten minutes for each member above or below that number.

Materials

- A set of colored 3” x 5” index cards for each team member. There should be as many colors of index cards as there are members, plus one; for example, if there are four team members, there should be five different colors of index cards. The set of cards that each member receives should include six cards of each color. Note: If there are more members than there are colors of index cards available, the facilitator may use white cards and code them with different colors of felt-tipped markers, making a colored stripe along the top edge of each card.
- A pencil for each team member.
- Two sheets of newsprint and a felt-tipped marker for each team member.
- A newsprint flip chart and a felt-tipped marker for the facilitator’s use.
- Masking tape for posting newsprint.

Physical Setting

A room with tables and movable chairs for the team members. Each member must have enough tabletop surface so that he or she can create stacks of index cards and prepare two newsprint posters.
Process

1. The facilitator describes the goal of the activity, emphasizing that when team members establish agreements about which activities are the team’s responsibility and which are the responsibilities of individual members, they can enhance not only the effectiveness of their team but also their individual security and motivation as members of that team.

2. Each team member is assigned a color of 3” x 5” index cards, and one color is reserved for the team; these color assignments are announced and written on newsprint. Each member is given a set of index cards and a pencil.

3. The facilitator gives instructions as follows:
   - Using the cards of the color assigned to him or her, each member (a) writes brief descriptions of six work activities (one activity per card) that are his or her most important responsibilities and prerogatives; and (b) rank orders the activities, writing the rank of each on its card.
   - Using the cards of the color assigned to another team member, each member (a) writes brief descriptions of six work activities (one activity description per card) that are the most important responsibilities and prerogatives of that member; and (b) rank orders the activities, writing the rank of each on its card. This procedure is completed for every other member of the team.
   - Using the cards of the color assigned to the team, each member (a) writes brief descriptions of six work activities (one activity description per card) that are the most important responsibilities and prerogatives of the team as a whole; and (b) rank orders the activities, writing the rank of each on its card.

   The facilitator elicits and answers questions about the task and then asks the members to begin. (Approximately forty minutes.)

4. After the members have completed the task, they are instructed to distribute their completed cards to the appropriate team members and to give the cards identifying team activities to the facilitator.

5. The facilitator gives each team member two sheets of newsprint and a felt-tipped marker and then explains the process for reviewing and analyzing the content of the cards:
   - Each member reviews the cards received and compares them with the ones that he or she wrote.
   - Each member sorts the cards into stacks that reflect the same basic intent.
   - Each member summarizes his or her conclusions on two newsprint sheets: one listing activities and rankings about which there is widespread agreement and the other listing activities and rankings about which there is not widespread agreement. On the latter sheet, the member writes “S” (for “self”) beside...
activities that he or she identified and others did not and writes “O” (for “others”) beside activities that others identified and he or she did not; discrepancies in rankings are similarly identified.

(Thirty minutes.)

6. The members are instructed to take turns posting their newsprint sheets and sharing their conclusions with the team. The facilitator explains that the purpose of each presentation and the ensuing discussion is to try to reach agreement on each member’s six most important activities and their rankings. The members are told that each presentation should follow this pattern:

- The member who is making the presentation summarizes activities and rankings on which he or she and fellow team members generally agreed and then asks the team members if they concur with this analysis. If there is disagreement, the facilitator assists in a discussion intended to help the team to move toward clarity and agreement regarding activities and their rankings. If the team members are unable to reach clarity and/or agreement, the activities and rankings under dispute are listed on a separate sheet of newsprint.

- The member summarizes activities and rankings on which he or she and fellow team members disagreed. Again, the facilitator assists in a discussion intended to move the team toward clarity and agreement. Where disagreements persist, the activities and rankings in question are added to the separate sheet of newsprint, which is then set aside.

After all team members have taken a turn, the team is asked whether it might be useful to set up another time to meet and address the activities and rankings that require further clarification and/or agreement. If the members want a follow-up session, the details of that session are determined, including the process to be followed. The separate sheets of newsprint listing activities and rankings in dispute are given to one of the members to retain or transcribe into handout form for use at the follow-up session. (Approximately fifteen minutes per team member.)

7. The team members are asked to be seated around one of the tables. The facilitator gives them the team cards, and they separate the cards into two stacks: (a) activities and rankings representing general agreement, either according to the cards or as a result of discussion, and (b) activities and rankings that represent disagreement. The two sets of activities are listed on separate newsprint sheets and are posted. The facilitator leads a discussion about the activities and rankings that represent disagreement, helping the team members to move toward clarity and agreement regarding the team’s six most important activities and their rankings. If disagreement persists, the facilitator encourages the members to set up another follow-up session and to determine a process to follow during that session. The newsprint list of activities and rankings in dispute is given to one of the members to keep for use at the follow-up session. (Forty-five minutes.)
8. The facilitator leads a concluding discussion based on the following questions:
   - How are you feeling about your team at this moment? How do you feel about being a member of this team?
   - In what ways has this experience been helpful to you and to the team as a whole? What have you learned? What surprised you?
   - When are activities best completed by the team? When are they best completed by individual members?
   - In your day-to-day work with your team, how will you use what you have learned as a result of this experience?

Variations
   - If this activity is being conducted as a result of prior diagnosis and team-member agreement regarding the need to distinguish team activities from individual-member activities, in step 1 the facilitator should review information about the diagnosis and agreement.
   - The facilitator may request in advance that the team members bring with them to the activity any existing documentation that could be useful, such as written job descriptions.
   - If extra time is available, the individual and team activities and rankings that remain in dispute may be addressed in the same session.
   - This activity may be used to identify the kinds of decisions that should be made by individual members or by the team.

Submitted by Mike M. Milstein.
TASKS, SKILLS, AND COMMITMENTS: BUILDING A COOPERATIVE TEAM

Goals
- To increase the team members’ awareness of one another’s tasks and skills.
- To encourage the team members to commit to assisting one another in performing tasks and using skills.

Group Size
All members (at least three and not more than twelve) of an ongoing team or a temporary team (for example, a product-development team or a task force). This activity is intended to be used soon after the formation of a team or when new members or new responsibilities are acquired.

Time Required
One hour to one hour and forty minutes, depending on the number of team members.

Materials
- A felt-tipped marker for each team member.
- A pad of large Post-it™ Notes for each team member.
- A newsprint flip chart.
- Masking tape for posting newsprint.

Physical Setting
A room with movable chairs. Plenty of wall space is recommended for posting newsprint. Tables are helpful (for creating newsprint lists) but not essential.

Process
1. The facilitator introduces the goals of the activity.
2. Each team member is given a felt-tipped marker and a sheet of newsprint and is asked to make a newsprint list of the major tasks that he or she performs on the job. The facilitator explains that after completion the task lists should be posted on the wall, with at least enough space between lists to accommodate another sheet of newsprint. (Approximately ten minutes.)
3. After all lists have been posted, the team members take turns presenting the contents of their lists. After each presentation, the facilitator encourages the members to ask questions about any information that they need clarified. (Five to fifteen minutes.)
4. Each team member receives another sheet of newsprint and is asked to list on it the skills that he or she uses in performing work tasks. The facilitator announces that the completed skill lists should be posted on the wall, next to their respective task lists. (Approximately ten minutes.)

5. After the new lists have been posted, the team members again take turns presenting the contents. After each presentation, questions are asked and answered as necessary. (Five to fifteen minutes.)

6. Each member is given a pad of large Post-it™ Notes so that he or she can write a note to each other team member about a way in which he or she might assist or support that member in performing tasks and using skills. Each Post-It™ Note is placed on the other member's newsprint list (task or skill) where appropriate. (Five to fifteen minutes.)

7. The team members take turns reading aloud the Post-it™ Notes attached to their own newsprint lists so that the entire team knows what assistance and support have been offered and what commitments have been made. (Five to ten minutes.)

8. The facilitator leads a discussion on reactions to the process as well as how to follow up on the commitments that have been made. The following questions may be helpful:
   - What was your reaction to writing lists of your tasks and skills and then presenting them to the team? What was your reaction to hearing about others’ tasks and skills?
   - How did it feel to offer assistance and support? How did it feel to receive assistance and support?
   - What have you learned about your team’s tasks and skills? What have you learned about its assistance and support?
   - What have you learned about making commitments?
   - How can you ensure that the commitments made today are met—that the assistance and support are, in fact, given? What can you personally do to ensure that you meet the commitments you have made to others? (Fifteen to twenty minutes.)

9. Before dismissing the team members, the facilitator informs them that all posted information will be reproduced and distributed to them as a handout. The facilitator also recommends that the team members review their tasks, skills, and commitments every few months.

**Variations**
- The team members may be instructed to list only those tasks and skills that they need or want assistance with.
- After Step 8, the team members may assemble into pairs to make contracts to assist each other.

- When developing their skill lists, the team members may list only those skills and resources that they bring to the team. The team members who can benefit from those skills and resources may then use the Post-it™ Notes to match their needs with the resources offered.

Submitted by Robert C. Preziosi.
JOE DOODLEBUG: EXPLORING RESPONSES TO PROBLEMS

Goals
- To explore the effects of the team members’ responses to a team problem-solving effort.
- To observe the team members’ leadership behaviors in a problem-solving situation.

Group Size
All members of an ongoing team.

Time Required
Approximately one hour.

Materials
- A copy of the Joe Doodlebug Briefing Sheet for each team member.
- One copy of the Joe Doodlebug Observer Form for the team member who is designated to observe the process.
- One set of Joe Doodlebug Rule Cards, prepared in advance. To make the cards, the facilitator types each of the five rules on a 3" x 5" index card (one rule per card).
- A pencil for each team member.

Physical Setting
Movable chairs for the team members. The chairs should be arranged in a circle, and writing surfaces of some type should be provided.

Process
1. The facilitator designates one team member to observe the upcoming problem-solving process; distributes briefing sheets, the observer sheet, and pencils; and asks the members to read their sheets.
2. The facilitator distributes the rule cards. (In a six-member team, each of the five members who participate in the problem-solving process receives a different rule card. If the team has more or fewer than five participating members, the facilitator adjusts the number of cards that each receives.)
3. The team is instructed to begin solving the problem in accordance with the rules. (Twenty minutes.)
4. When there is substantial agreement among the participating members that the solution has been reached (or after twenty minutes, whichever comes first), the facilitator asks the observer to share observations, then facilitates a discussion of how the team organized to accomplish its task, and finally announces the solution to the problem. (Solution: At the moment Joe saw the food, he had already jumped once to the east. He therefore has to jump three times more to the east, then once to the west, landing on top of the food. Then he can eat.) (Fifteen minutes.)

5. The team members are asked to give one another feedback, with the observer’s help, on what behaviors each participant displayed that influenced the team. (Ten minutes.)

6. The facilitator presents a lecturette on the concept of shared leadership, stressing the responsibility of each individual team member for both task attainment and team maintenance. (Ten minutes.)

Variations

- The problem may be made more difficult by adding superfluous information.
- The rules may be given to each team member in the form of a handout.
- The team may be given a time limit (of ten minutes, for example) for solving the problem.
- If the team does not reach a decision after a reasonable amount of time or does not progress at a suitable pace, the facilitator may give hints one at a time and in the following order:
  - Joe does not have to face the food in order to eat it (the facing belief).
  - Joe can jump sideways and backward as well as forward (the direction belief).
  - Joe was moving east when the food was presented (the movement belief).

JOE DOODLEBUG RULE CARDS

1. Joe can jump in only four different directions: north, south, east, and west. He cannot jump diagonally (northeast, northwest, southeast, or southwest).

2. Once Joe starts in any direction, he must jump four times in that same direction before he can change his direction.

3. Joe can only jump. He cannot crawl, fly, or walk.

4. Joe can jump precise distances up to eight inches per jump, but he cannot jump a distance of less than one inch.

5. Joe cannot turn around. He always faces north.
JOE DOODLEBUG BRIEFING SHEET

The Situation

Joe Doodlebug is a strange sort of imaginary bug that can and cannot do certain things. He has been jumping all over the place getting some exercise when his master places a pile of food near him. As soon as he see the food, Joe stops in his tracks. He notes that the pile of food is a little larger than he and that it is three inches directly west of him.

After all of this exercise, Joe is very hungry and wants to get the food as quickly as he can. He examines the situation and then says, “Darn it, I’ll have to jump four times to get the food.”

The Problem

Joe is a smart bug, and he is dead right in his conclusion. Why do you suppose Joe Doodlebug has to take four jumps, no more and no less, to reach the food?
JOE DOODLEBUG OBSERVATION FORM

Instructions: During the upcoming problem-solving process, you are to write your answers to the following questions. Be sure to record who did what.

Organization

1. How did the team members get started?

2. Who assumed leadership responsibilities? How did this come about?

3. Why did the team members begin sharing their resources?

4. What procedures did they develop to solve the problem?

The Flow of Information

5. How did the team members expose all of the information about the problem?

6. Which pieces of information were accepted? Which were rejected?
7. How was the information collated or compiled?

The Processing of the Information

8. How did the team stay on track?

9. What decision rules emerged?

10. What visual aids were employed?

11. How was consensus achieved and tested?

Critique

12. How did the team discuss its own functioning?

13. What climate emerged in the meeting?
LUTTS AND MIPPS: TEAM PROBLEM SOLVING

Goals
- To study the sharing of information within a team.
- To focus on cooperation in team problem solving.
- To offer the team members an opportunity to observe the emergence of leadership behavior in team problem solving.

Group Size
All members of an ongoing team.

Time Required
Approximately one hour.

Materials
- A copy of the Lutts and Mipps Instruction Form for each team member.
- One set of Lutts and Mipps Information Cards, prepared in advance. To make the cards, the facilitator types each of the twenty-six sentences on a 3" x 5" index card (one sentence per card).
- A copy of the Lutts and Mipps Reaction Form for each team member.
- A pencil for each team member.

Physical Setting
A room with movable chairs so that the team members can be seated in a circle. Writing surfaces of some type should be provided.

Process
1. The facilitator distributes copies of the Lutts and Mipps Instruction Form and asks the team members to read this handout.
2. After ensuring that the team members understand the task, the facilitator distributes the information cards randomly. (The team must be given all twenty-six cards.) Pencils are also distributed. Then the team is told to begin its work.
3. After twenty minutes the facilitator interrupts, distributes copies of the reaction form, and instructs the team members to complete the reaction form individually. (Fifteen minutes.)
4. The facilitator announces the solution (See Answer Key, following the Variations for this activity) and then leads a discussion based on the reaction form, encouraging the team members to share information from their completed forms.

Variations

- The facilitator may simplify the problem-solving task by distributing copies of a handout consisting of all twenty-six sentences.
- The facilitator may make the problem more difficult by adding redundant or superfluous information.
- The same activity structure may be used with a problem that is relevant to the team.

Answer Key

All of the following information is derived from the portion of the activity entitled "Lutts and Mipps Information Cards."

\[
\begin{align*}
\text{A to B: } & 4 \text{ lutts at } 24 \text{ lutts per wor} = 4/24 \text{ wor} = 1/6 = 5/30 \text{ wor} \\
\text{B to C: } & 8 \text{ lutts at } 30 \text{ lutts per wor} = 8/30 \text{ wor} \\
\text{C to D: } & 10 \text{ lutts at } 30 \text{ lutts per wor} = 10/30 \text{ wor} \\
\end{align*}
\]

\[
\begin{align*}
5/30 \text{ wor} \\
+ 8/30 \text{ wor} \\
+ 10/30 \text{ wor} \\
\text{Total = } 23/30 \text{ wor}
\end{align*}
\]

The task in this activity is based on a problem by Rimoldi, *Training in Problem-Solving*, Publication No. 21, Loyola University Psychometrics Laboratory.
LUTTS AND MIPPS INSTRUCTION FORM

Pretend that lutts and mipps represent a new way of measuring distance and that dars, wors, and mirs represent a new way of measuring time. A person drives from Town A, through Town B and Town C, to Town D.

Your team’s task is to determine how many wors the entire trip took. You have twenty minutes to complete this task. Do not choose a formal leader.

You will be given cards containing information related to the task. You may share this information orally, but you must keep your cards in your hands throughout the task.
LUTTS AND MIPPS INFORMATION CARDS

To make a set of cards, type each of the following sentences on a 3" x 5" index card (a total of 26). A set should be distributed randomly among members of each group. Each group must have all twenty-six cards.

1. How far is it from A to B?
2. It is 4 lutts from A to B.
3. How far is it from B to C?
4. It is 8 lutts from B to C.
5. How far is it from C to D?
6. It is 10 lutts from C to D.
7. What is a lutt?
8. A lutt is 10 mipps.
9. What is a mipp?
10. A mipp is a way of measuring distance.
11. How many mipps are there in a mile?
12. There are 2 mipps in a mile.
13. What is a dar?
14. A dar is 10 wors.
15. What is a wor?
16. A wor is 5 mirs.
17. What is a mir?
18. A mir is a way of measuring time.
19. How many mirs are there in an hour?
20. There are 2 mirs in an hour.
21. How fast does the person drive from A to B?
22. The person drives from A to B at the rate of 24 lutts per wor.
23. How fast does the person drive from B to C?
24. The person drives from B to C at the rate of 30 lutts per wor.
25. How fast does the person drive from C to D?
26. The person drives from C to D at the rate of 30 lutts per wor.
LUTTS AND MIPPS REACTION FORM

1. How did the team approach the sharing of information? (What techniques were used?)

2. a. Whose participation was most helpful in the accomplishment of the task?

   b. What particular behaviors were helpful?

3. a. Whose participation seemed to hinder the accomplishment of the task?

   b. What particular behaviors seemed to be a hindrance?

4. What feelings did you experience while the team was working on the problem?

5. What role(s) did you play in the team?

6. a. Who assumed leadership roles during the problem-solving task?

   b. How would you describe the leadership behaviors that emerged?
c. What were the effects of these behaviors on the completion of the task?

d. How would you characterize the team members’ response to the leadership behaviors that emerged?

7. a. What have you learned about your personal approach to problem solving?

b. What have you learned about the team’s approach?

c. How can you use what you have learned when the team works on real problems?
UNSCRAMBLING THE BANK ACCOUNTS: TEAM PROBLEM SOLVING

Goals
- To enable the team members to experience team problem-solving processes.
- To give the team members an opportunity to observe and identify behaviors and methods that facilitate or hinder effective teamwork.
- To highlight the consequences of conflicts between individual objectives and team objectives.
- To provide a basis for exploring means to make teamwork more effective.

Group Size
All members of an ongoing team.

Time Required
Approximately one hour.

Materials
- A copy of the Unscrambling the Bank Accounts Fact Sheet for each team member.
- A set of Unscrambling the Bank Accounts Data Cards for each subgroup.
- Blank paper and a pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- A stopwatch.
- A copy of the Unscrambling the Bank Accounts Answer Sheet for the facilitator.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting
A room that is large enough to allow the subgroups to work without disturbing one another.

Process
1. The facilitator announces the goals of the activity.
2. The team members are divided into two subgroups of approximately equal size.
3. Each team member is given a copy of the fact sheet, blank paper, a pencil, and a clipboard or other portable writing surface.

4. Each subgroup is given one set of the data cards; the cards are distributed approximately evenly among the subgroup members. The subgroup members are told not to reveal the information on their cards to anyone else at this point.

5. The facilitator instructs the members of each subgroup to study the fact sheet and the cards that were assigned to them. (Five minutes.)

6. The facilitator asks if anyone needs clarification and deals appropriately with any questions. (Five minutes.)

7. The facilitator explains that the subgroups will be timed as they unscramble the bank accounts and match the name of each account holder with the appropriate bank, account number, size of balance, and occupation. The members of each subgroup are told that during the activity they may discuss the information on the cards that were assigned to them, but they may not pass the cards around for others to see. The facilitator also explains the scoring system, tells the subgroup members that no more questions will be answered, and instructs the subgroup members to raise their hands when they arrive at a solution.

8. The facilitator announces that it is time to begin the activity and starts the stopwatch.

9. When a hand is raised, the facilitator makes a note of the time and then checks the answer for accuracy. If any part of the answer is wrong, the facilitator merely tells the subgroup member or the subgroup to continue working on the problem because the answer is not correct. (Twenty-five minutes.)

10. After both subgroups have found the correct solution, the answers are written on newsprint and posted. The facilitator leads a discussion based on the following questions:

- What individual behaviors and problem-solving methods facilitated your subgroup in solving the problem? What individual behaviors and problem-solving methods hindered it?

- At what points were you tempted to leave the subgroup and try to solve the problem on your own? What choice did you make? How do you account for your choice?

- When an individual dropped out of your subgroup, how did you feel? How did you feel when the individual rejoined your subgroup?

- What did you learn about conflict between individual objectives and team objectives and its effect on teamwork?

- In what ways could you make the teamwork more effective in this team?
Variations

- Each subgroup member may be given a set of data cards.
- A few wild cards (which do not include pertinent information) may be added to the set of data cards. The following are examples of wild cards:
  - Pat drives a 1984 Buick.
  - Eastern Bank has fewer branches than any of the other banks.
  - Western Bank waives its normal charges for customers who maintain a balance in excess of $500.
  - Central Bank offers special discounts to senior citizens.

Submitted by John E. Hebden.
UNSCRAMBLING THE BANK ACCOUNTS FACT SHEET

These five people have bank accounts:
   Rob, Jamie, Ivy, Leslie, and Pat.

The names of their banks, listed alphabetically, are as follows:
   Central, Eastern, Northern, Southern, and Western.

The following account numbers, listed in numerical order, have been issued to the account holders:
   727253, 1799351, 4219530, 10429538, and 42911786.

The accounts contain the following amounts (listed in descending order of size):
   $1,347.40; $550.90; $222.12; $105.00; and $25.50.

The account holders have the following occupations (listed alphabetically):
   Accountant, architect, attorney, doctor, and teacher.

Instructions

Your subgroup’s task is to match the name of each person with the appropriate occupation, bank, account number, and account balance.

Scoring

If your subgroup has solved the problem correctly in every aspect the first time it submits an answer, it will receive a score of one hundred minus the number of minutes it took to find the solution.
   Each time a subgroup submits an answer that is not correct in every aspect, five points will be deducted from its score as it continues to try to solve the problem.
   At any time, you—as an individual—may drop out of the subgroup effort and propose your individual solution. If the first individual answer that you submit is correct in every aspect, your score will be one hundred minus half the number of minutes that were taken to solve the problem. You may then share the correct answer with your subgroup, and your individual score will become your subgroup’s score. If your solution is not correct in every aspect, you may rejoin the subgroup and deduct ten points from the subgroup’s score (that is, one hundred minus the number of minutes required to solve the problem minus an additional ten points). This will be your only opportunity to rejoin the subgroup. If you choose to continue to work on your own, deduct fifteen points from your individual score. For each additional time that you submit an incorrect answer, deduct five points from your individual score.
UNSCRAMBLING THE BANK ACCOUNTS DATA CARDS

Prior to conducting the activity, the facilitator should prepare a set of data cards for each subgroup. Each set should contain one card for each of the following pieces of information:

Pat’s account number and Jamie’s account number contain the same number of digits.

Leslie is an attorney.

Jamie is not an accountant.

There is a balance of $105.00 in the doctor’s account.

Western Bank accounts have six digits.

Pat does not have an account with Southern Bank.

The balance in the account at Eastern Bank is $105.00.

Rob does not have an account with Southern Bank.

The doctor’s account number is 42911786.

The balance in account number 4219530 is $222.12.

The balance in the accountant’s account is less than $200.00.

Pat is a teacher.

The balance in the Western Bank account is more than $100.00.

The balance in Jamie’s account is $550.90.

The teacher obtained a special discount with Central Bank.

Rob’s account number is 10429538.
### UNSCRAMBLING THE BANK ACCOUNTS ANSWER SHEET

*(For the Facilitator Only)*

<table>
<thead>
<tr>
<th>Name</th>
<th>Occupation</th>
<th>Bank</th>
<th>Account No.</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rob</td>
<td>Accountant</td>
<td>Northern</td>
<td>10429538</td>
<td>$25.50</td>
</tr>
<tr>
<td>Jamie</td>
<td>Architect</td>
<td>Southern</td>
<td>1799351</td>
<td>550.90</td>
</tr>
<tr>
<td>Ivy</td>
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<td>Eastern</td>
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</tr>
<tr>
<td>Leslie</td>
<td>Attorney</td>
<td>Western</td>
<td>727253</td>
<td>1,347.00</td>
</tr>
<tr>
<td>Pat</td>
<td>Teacher</td>
<td>Central</td>
<td>4219530</td>
<td>222.12</td>
</tr>
</tbody>
</table>
THREATS TO THE PROJECT: ENHANCING EFFECTIVENESS

Goals
- To increase the team members’ understanding of group dynamics.
- To enhance the members’ effectiveness at working together.

Group Size
All members of an ongoing team.

Time Required
One hour and fifteen to thirty minutes.

Materials
- A copy of the Threats to the Project Situation Sheet for each team member.
- A copy of the Threats to the Project Work Sheet for each team member.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
A room with movable chairs and writing surfaces for the team members.

Process
1. The facilitator introduces the goals of the activity.
2. Each team member is given a copy of the Threats to the Project Situation Sheet and is asked to read this handout. (Five minutes.)
3. The facilitator distributes copies of the Threats to the Project Work Sheet and pencils and instructs the team members to complete the work sheet individually. (Fifteen minutes.)
4. The team members are instructed to share the notes that they made on their work sheets and to work together to develop a step-by-step action plan for resolving the nine problems. The team is provided with a newsprint flip chart and a felt-tipped marker so that the details of the action plan can be recorded. The facilitator remains available during this time to observe, to answer questions, and to assist as necessary.
5. After thirty minutes the team is asked to stop its work. The facilitator leads a discussion of the activity by asking questions such as the following:
How satisfied are you with the final action plan?

To what extent does the plan reflect the ideas and viewpoints of all of the members? What process did you use to arrive at the plan and to determine which ideas to incorporate and which to exclude?

How satisfied are you with this process? Which elements of the process pleased you? Which displeased you?

How did the process fit with your definition of a team?

Did everyone participate in the discussion? If so, how did the team achieve total participation? If not, what inhibited the participation of some of the members?

What member behaviors helped to support teamwork?

What behaviors hindered teamwork?

As you worked together, how did you handle conflicting opinions?

How did this activity reflect the way in which you typically work together? What atypical behaviors arose? How can you use this information in your work together in the future?

What are the benefits of working together as a team to solve problems? What can you do to ensure that these benefits are experienced in future team efforts at problem solving?

What are the drawbacks to team efforts? How can you help to overcome some of these drawbacks?

**Variation**

- After step 5 the team members may be instructed to resume the activity of step 4. Subsequently, after another thirty minutes they should be asked to compare their behavior to that manifested during their previous completion of step 4.
THREATS TO THE PROJECT SITUATION SHEET

A month ago you became a first-line manager in a large industrial firm. This is your first managerial position and, like all other new first-line managers, you are required to attend a management-training program conducted by the company’s training department. You started the program two months ago, just after you learned that you were to be promoted. At first you were excited at the prospect of learning how to be an effective manager, but as the training has progressed, your enthusiasm has waned. You and the other trainees are frankly perplexed about the program, which seems to be poorly planned, prepared, and executed.

One of the problems is that the trainers are not credible; they know the program content, but cannot relate to the experience of the first-line manager. You and your fellow trainees see them as “ivory-tower types.” In addition, the trainers lecture too much, apparently because they are pressed to cover a lot of material in little time. Consequently, the trainees do not have the chance to voice their opinions and share the experience.

You also have a quarrel with the content of the program. The trainers deal in generalities and use examples that seem irrelevant and outdated. What you and the other trainees want and need is training in specific skills and “how-to” information. Often you cannot determine how to use the training you receive.

Not all of the problems lie with the trainers and the program content, though. The middle managers, such as your leader and those who supervise the other trainees, do not support the training program. They are uninformed about the program content; they often ask their subordinates to leave training sessions to take care of minor problems; and they do not arrange to cover for their subordinates during training.

Because of the climate within some departments of the company, you and some of the other trainees are not allowed to apply what is learned. Even when on-the-job application is possible, the middle managers do not actively support the reinforcement of the training. The trainers wish they could help, but they have no authority or accountability in the trainees’ individual departments. In short, the training seems to be an isolated effort; the trainees are not encouraged to view and experience the program as part of their career planning.

At this point the trainees seem to be the only ones who are truly concerned about these problems. In the past the only effort that has been made to evaluate the program is the administration of an end-of-course participant-reaction form. You are not certain who receives the data from these forms and what, if anything, is done with the information. The upper and middle managers never seem to know whether the benefits from the training are worth the investment in trainer and trainee salaries, time, materials, and so forth.

The program is scheduled to continue for another two months, and you do not want it to be a total waste. Consequently, you and your fellow trainees have decided to hold a meeting to discuss the problems involved and to determine what can be done to salvage the training experience.
THREATS TO THE PROJECT WORK SHEET

*Instructions:* To organize your thoughts before the meeting, list four suggestions about ways to solve the various problems involved in the situation. When you meet with your team, you will be sharing these suggestions and helping to construct a step-by-step action plan for salvaging the training program.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Trainers not credible</td>
<td></td>
</tr>
<tr>
<td>2. Too much lecture</td>
<td></td>
</tr>
<tr>
<td>3. Too much theory, not enough application</td>
<td></td>
</tr>
<tr>
<td>4. Irrelevant material</td>
<td></td>
</tr>
<tr>
<td>5. No middle-management support</td>
<td></td>
</tr>
<tr>
<td>6. Application of learning not allowed</td>
<td></td>
</tr>
<tr>
<td>7. No on-the-job reinforcement</td>
<td></td>
</tr>
<tr>
<td>8. Training not integrated into career developpment</td>
<td></td>
</tr>
<tr>
<td>9. Inadequate evaluation and follow-up of program</td>
<td></td>
</tr>
</tbody>
</table>
THE LAWN: PROBLEM OR SYMPTOM?

Goals
- To provide the team members with an experience in clearly defining a problem.
- To increase the team members’ awareness of the difference between the causes of a problem and the symptoms of a problem.
- To demonstrate how using only oral communication can affect the problem-solving process.

Group Size
All members of an ongoing team.

Time Required
One hour and twenty to thirty minutes.

Materials
- Twenty-five 3” x 5” index cards, each bearing a different statement from The Lawn Statement Sheet (prepared in advance by the facilitator).
- A sheet of blank paper and a pencil.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting
A room in which the team members can work without being interrupted. Movable chairs should be provided.

Process
1. The facilitator announces that each team member is about to receive several index cards, each of which lists a statement of data concerning a situation, and that the total number of cards to be given to the team is twenty-five. The team members are told that their task will be to define the problem from the data on the cards. Before distributing the cards, the facilitator explains the rules for the activity:
   - The members are not permitted to exchange cards or to show their cards to one another.
   - All data statements must be communicated orally and may be repeated as often as the team feels is necessary.
- If all members of the team feel that a data statement is not relevant to the definition of the problem, the card bearing that statement is to be placed face down and its information not repeated.

- The team members may *not* take notes during the process.

- The team will have thirty minutes to define the problem. At the end of that time the members will be asked to write their definition of the problem, and only one definition may be submitted.

  The facilitator elicits and answers questions about the task and the rules. (Five to ten minutes.)

2. The facilitator distributes the cards and asks the team members to begin. While they are working, the facilitator prepares a newsprint list of the twenty-five statements. (Thirty minutes.)

3. After thirty minutes the facilitator calls time, gives the team a sheet of blank paper and a pencil, and instructs the team members to write their definition of the problem on the paper. (Five minutes.)

4. The facilitator asks a spokesperson to read the problem definition and to report on how the team arrived at the definition. (Five minutes.)

5. The facilitator writes the appropriate definition of the problem on newsprint and announces it: *how to rid the lawn of grubs.* The facilitator also posts the newsprint list of the twenty-five statements. With the team members’ input, the facilitator checks the relevant statements on the newsprint list; indicates why other data are irrelevant; and explains how the answer was reached, answering any questions that arise. (Fifteen minutes.)

6. The facilitator leads a discussion on the following points:

- Their reactions to the experience;
- Whether they had difficulty in separating irrelevant from relevant data;
- How they decided which data were relevant;
- Whether and how they reached total agreement on the definition of the problem;
- How the use of only verbal communication affected the difficulty of the task;
- What they learned about differentiating the causes of a problem and its symptoms; and
- How they can apply what they have learned in dealing with team problems in the future.

**Variations**

- The facilitator may give a lecturette on the total problem-solving process or on some other appropriate aspect of problem solving.
- The team members may be instructed to discuss and to list behaviors that either contributed to successful task completion or hindered the team.
- The rule about using only oral communication may be eliminated.
- The team members may be encouraged to focus on a team problem and to determine which aspects are symptoms and which are causes.

Submitted by William W. Kibler and William T. Milburn.
THE LAWN STATEMENT SHEET

Instructions: These twenty-five statements are to be distributed individually to the members of each group (five separate statements to each of the five group members).

In the past I have always had a beautiful lawn.

The lawn is dying in spots, and it looks awful.

The dead spots have ridges.

Moles make ridges.

The lawn has never had ridges before.

I take great pride in my lawn.

My neighbor’s lawn does not have dead spots.

My neighbor is making fun of my lawn.

I don’t like my neighbor.

My lawn does not need water.
My lawn does not need fertilizer.

My riding mower is broken.

I want to get rid of the dead spots in my lawn.

Moles have tiny eyes.

Moles have concealed ears.

Moles work in the dark.

Moles have soft fur and eat grubs.

My neighbor has a mole on his neck.

My main concern is my lawn.

My push mower is working fine.

Moles are eager eaters.
My lawn has good drainage.

My lawn is frustrating me.

Moles tunnel in search of food.

I do not like moles.
CONTROL OR SURRENDER: ALTERING APPROACHES TO PROBLEM SOLVING

Goals
- To introduce the team members to a method for changing the way in which they perceive problems.
- To assist the team members in developing action plans in which they apply their changed perceptions to a team-owned problem. (This activity is used when a team has a predefined, internal problem to consider.)
- To assist the team members in synthesizing their individual action plans into a team approach to dealing with the problem.

Group Size
All members of an ongoing team.

Time Required
Approximately one hour and forty minutes.

Materials
- One copy of the Control or Surrender Theory Sheet for each team member.
- One copy of the Control or Surrender Problem Approach Sheet for each team member.
- Newsprint prepared in advance with the predefined problem written at the top and followed by these incomplete sentences:
  1. I want to __________________________________________________________
     but ______________________________________________________________.
  2. I can’t ___________________________________________________________
     because __________________________________________________________.
  3. If it weren’t for _________________________________________________
     I would ________________________________________________________.
  4. I have to _________________________________________________________
     because ________________________________________________________.
  5. _________________________________________________________________
     makes me ________________________________________________________.
- Blank paper and a pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

**Physical Setting**

A room in which subgroups of two or three team members each can work without disturbing one another. A table should be provided for each subgroup, and a movable chair should be provided for each team member. If tables are not available, each team member should be given a clipboard or other portable writing surface.

**Process**

1. The facilitator introduces the goals of the activity. The team members are given blank paper and pencils and are instructed to begin thinking about the predefined, internal problem facing the team. The facilitator posts the newsprint with the incomplete sentences and asks the team members to work individually to complete the sentences, using their own unique perceptions of the problem as a basis for their completions. The facilitator explains that later the team members will be asked to use these sentences as practice in viewing the problem in a new way. (Ten minutes.)

2. The facilitator distributes copies of the Control or Surrender Theory Sheet and asks the team members to read this handout. (Five minutes.)

3. The facilitator leads a brief discussion of the handout contents, clarifying as necessary and eliciting examples of control/surrender in problem-solving situations from the team members’ own experience. (Ten minutes.)

4. The facilitator announces that before the team members practice viewing the team problem in a new way, they will have a chance to practice changing their viewpoints about a nonproblem situation. Then the facilitator delivers the following instructions in a quiet, soothing voice, pausing at intervals for the length of time indicated:

   - Sit with your lower back against the chair, your feet flat on the floor, and your arms and hands open. [*Pause of ten seconds.*]

   - Relax; close your eyes; and take three long, deep breaths. [*Pause of ten seconds.*]

   - Focus your attention on your breathing. Don’t change your breathing at all; just become aware of it. [*Pause of ten seconds.*]

   - Relax further, and continue to focus on your breathing. Notice the precise points at which the breath starts to come in and starts to go out. [*Pause of thirty seconds.*]

   - Without changing anything except your attention, act as if the air is breathing you. Give up the control of your breathing. Surrender. Let the air be the doer; let it reach itself into you and draw itself out. [*Pause of ten seconds.*]
Now, without changing anything except your attention, act as if you are the doer. Observe yourself as the one doing the breathing. [Pause of ten seconds.]

Now shift once again, and act as if the air is breathing you. This time notice if there is any change in your feelings when you shift from the controlling role to the surrendering role. [Pause of ten seconds.]

Switch again. Act as if you are breathing the air and you are in the controlling role. Notice the change in feeling. [Pause of ten seconds.]

Now relax, and think for a moment about the differences you observed in the two kinds of breathing experiences. [Pause of ten seconds.]

Now let your eyes open.

(Five minutes.)

5. The team members are instructed to form subgroups of two or three members each and to spend five minutes sharing perceptions of their experiences during the previous step. While the subgroups are sharing, the facilitator divides a sheet of newsprint into two columns, one headed “Control” and the other headed “Surrender.” (Five minutes.)

6. The facilitator asks the subgroups to stop and then invites the team members to share both their positive and negative feelings during each of the two breathing experiences, controlling and surrendering. As the team members report, the facilitator records responses in the appropriate columns without comment. (Ten minutes.)

7. The facilitator instructs the team members to review their five sentence descriptions of the problem and to consider these sentences as “victim self-talk,” the way that people talk to themselves when they feel relatively powerless about a particular situation. The team members are further instructed to make the following changes in their sentences, taking a few minutes after each to discuss in their subgroups how the change in wording causes a shift in the way the problem is perceived:

- In the first sentence cross out the word “but,” and substitute the word “and.”
- In the second sentence cross out the word “can’t,” and substitute the word “won’t.”
- In the third sentence cross out what you wrote in the first blank, and substitute what you might be thinking, feeling, expecting, or doing that is interfering with solving the problem.
- In the fourth sentence cross out the word “have,” and substitute the word “choose.”
- In the fifth sentence cross out what you wrote in the first blank, and substitute the word “my” followed by whatever fits (see the first blank in the third sentence).

(Fifteen minutes.)
8. The facilitator distributes copies of the Control or Surrender Problem Approach Sheet and instructs the members of each subgroup to use this sheet to help one another design new approaches to the problem. The facilitator emphasizes that although the problem is owned by the entire team, each member’s approach to it is individual; therefore, each member’s sheet should reflect what action and/or personal responsibility he or she intends to take to solve the problem. (Twenty minutes.)

9. The facilitator reconvenes the total team and leads a concluding discussion by asking the following questions:

- What were the new actions, attitudes, and/or viewpoints that emerged from this process?
- What were some of your thoughts and feelings as you switched your problem-solving approach to arrive at these new tactics?
- How did your change of approach affect the other members of your subgroup? How did their changes affect you?
- What can we conclude about the effect of switching problem-solving approaches on the way an individual views a problem? What about the effect of switching on the way a team views a problem? What about the effect on the problem itself?
- How could the team synthesize the individual action plans of each of the members to develop alternative approaches to solve the team’s problem?

**Variations**

- The activity may be used to address individual problems of the team members’ own choice rather than a team-owned problem.
- The facilitator may present the concept of control or surrender as a continuum along which one can move, depending on the situation.
- The facilitator may connect the concept of control or surrender with brain-hemisphere theory, interpersonal communication, interpersonal conflict (fight or flight), social-styles theory, or stress management.
- After step 9 the team members may be asked to combine their action plans into a team action plan or a list of individual commitments to the team problem.
- If the previous variation is used, the team members may be asked to speculate about the possible effects on the problem.

Submitted by Jim Ballard.
CONTROL OR SURRENDER THEORY SHEET

The ability to change one’s mind—to shift at will the way that something is viewed—is a skill that can be especially useful during times of rapid change. Often the way a person looks at a problem is the problem. Typically, having a problem means feeling the victim of it instead of the cause or source of it. In that state of mind, people do not experience their power to change things. This powerlessness reduces perceptual range and leads to tunnel vision. This is why in most situations the problem owner’s ability to recognize the key dynamics of the situation is diminished.

In order to gain new power in a problem situation and a new perspective on the problem itself, it is a good idea to experiment with the priceless ability that all of us possess—the ability to change our minds. The phrase “change your mind” usually denotes something that happens after much consideration or after confronting irresistible evidence contrary to a long-held belief. In other words, it usually takes a long time. But there is another kind of mind changing that has different characteristics:

1. It is fast. It can be done at any time, in a moment.
2. It is conscious. It involves deliberate control of the mind and does not happen without an act of the will.
3. It is inclusive. It sees all possibilities, including the original mind-set, the opposite mind-set, and all the points of view between the two.
4. It is noncommittal. It involves suspending judgment or commitment to a particular point of view.

Everyone has experienced the occasional problem that seems to defy resolution. One approach that can be helpful is to employ a kind of mind changing that involves altering one’s perspective and experimenting with a new perspective. As Einstein said, it is impossible to get out of a problem by using the same kind of thinking that it took to get into the problem. If one has been attempting to control the problem situation, one can make a conscious decision to reverse this perspective and surrender to the problem in order to see it differently. Surrendering does not mean permanently accepting the problem or its negative effects; instead, it means deciding to “let go” and stop working so hard to solve it. Letting go may have any of several positive results: The problem may resolve itself; someone else may come up with an acceptable or desirable solution; a good solution may even occur to the problem owner without any conscious effort. Sometimes the release of pressure opens up a number of possibilities. This perspective is based on the notion that in losing something or giving it up, one finds it or gets it back.

On the other hand, if one has been surrendering to the problem, one can decide to control it instead—again in order to see it differently. Controlling means taking a proactive rather than passive approach, working consciously to solve or resolve the situation as opposed to giving in or letting go. It can be invigorating to feel in charge of a problem situation, and it can be freeing as well. It becomes possible to discover
previously unknown resources and to bring these resources to bear on the situation in a productive way.

Both control and surrender are viable ways to address a problem. Steadfast use of one approach or the other can limit creativity and options, whereas the ability to switch viewpoints from one to the other can expand opportunities.
CONTROL OR SURRENDER PROBLEM APPROACH SHEET

My Approach to the Problem
1. So far my approach to the problem has been one of:
   ________ Control
   ________ Surrender

2. To help the team solve or resolve the problem, I will use the opposite approach:
   ________ Control
   ________ Surrender

3. The following opposite-approach tactics appeal to me.¹
   ________ Look for new information.
   ________ Do a force-field analysis.
   ________ Get help in diagnosing.
   ________ Confront a key player.
   ________ State my needs clearly.
   ________ Ask myself what I am doing that maintains the problem.
   ________ Change my own behavior.
   ________ Be more forceful/influential/persuasive.
   ________ Gather support.
   ________ Devise a strategy for removing power from opposing forces.
   ________ Define the worst-case scenario.
   ________ Bring in more muscle.
   ________ Examine my own commitment to change.

   ________________________________________________________
   ________________________________________________________
   ________________________________________________________

¹ If you are unfamiliar with any terms in the following lists, ask your facilitator to clarify them for you.
**Surrender**

- Act as if the situation is the way it is for a reason.
- Ask myself what I would do if I were the problem (if I viewed the situation from “inside” the problem).
  
  What would I say?
  How would I view the situation and the people involved, including myself?
- What positive effects would I, as the problem, have?
- Ask myself how the situation makes sense within a larger framework.
- Ask myself what I can learn from the situation and/or what the challenge is.
- Ask myself what would happen if I left the problem alone.
- Listen more to others.
- Practice serenity.
- Identify what good can come from the problem.

**My Contract with Myself**

1. I will change the way I view the situation by doing the following:

   _________________________________________________________
   _________________________________________________________
   _________________________________________________________
   _________________________________________________________
   _________________________________________________________

2. I will change my emotional response/reaction/feelings with regard to the problem by doing the following:

   _________________________________________________________
   _________________________________________________________
   _________________________________________________________
   _________________________________________________________
   _________________________________________________________
3. I will change my behavior by doing the following:

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
__________________________________
Signature
Witness: ___________________________
Witness: ___________________________
ACTION PLANNING:
A GUIDE FOR TEAM DEVELOPMENT

Goals
- To offer the team members an opportunity to study the process of team decision making.
- To allow the team members to explore the process of action planning.

Group Size
All members of an ongoing team.

Time Required
Three and one-half to four hours.

Materials
- One Action Planning Guide for each team member. The facilitator prepares the guides in advance in such a way that the team members can work on one page at a time.
- Blank paper and a pencil for each team member.
- A newsprint flip chart and several felt-tipped markers.
- Masking tape for posting newsprint.

Physical Setting
A room with a table and chairs for the team members.

Process
1. The facilitator asks the team members to be seated around the table, explains the goals of the activity, and assists the members in choosing an issue (a problem experienced by the team) as the focus of the activity. (Fifteen minutes.)
2. The facilitator gives the team a newsprint flip chart, several felt-tipped markers, and masking tape for posting newsprint. In addition, each team member receives a copy of the Action Planning Guide, blank paper, and a pencil. The team members are told to begin on Page 1 and to follow the instructions in the guide. The facilitator explains that he or she will be available throughout the process to answer questions and to provide whatever help is necessary. (Approximately three hours.)
3. When the team members have completed the process, the facilitator assists them in developing plans for presenting their action items or recommendations to their leader.
4. The facilitator leads a concluding discussion by asking questions such as these:

- How do you feel about the product of this process? How did you feel about the process itself while the team was working? How do you feel about the process now that you have completed it?
- In what ways was this process similar to the one your team generally uses to solve problems? In what ways was it different?
- What are the advantages of this process? What are the disadvantages?
- How might you use this process in the future?

**Variations**

- The team members may conduct a problem survey among themselves and form subgroups to work on the identified issues.
- The guide may be completed in three segments of approximately one hour each. (The processing of the entire experience, which requires fifteen to twenty minutes, should be added to the last segment.)
- The facilitator may precede the activity with a lecturette on force-field analysis (Lewin, 1969; Spier, 1990).
- In a separate session prior to this one, the team members may meet to choose the problem they will solve. Then the members may be assigned prework consisting of completing individual force-field analyses of the chosen problem.

**REFERENCES**


Suggested Procedure:

1. Read this guide.

2. Decide details about how you will proceed, such as the length of time to be spent completing the process described, etc.

3. Turn to Page 4 and begin. (The estimated time for the first reading of this guide is fifteen minutes. The estimated time for using the guide for problem solving is approximately three hours.)

A basic assumption about this process is that the team members have agreed to work on a common issue that has been determined prior to using the guide.

A Brief Summary of the Problem-Solving Process Presented in This Guide

1. Making sure that all team members are clear about the issue being addressed (see Page 7).
2. Analyzing before solving (see Page 10).
3. Brainstorming action ideas (see Page 16).
4. Selecting action ideas (see Page 18).
5. Writing a description of the action that is to be proposed or taken (see Page 19).
6. Reporting (see Page 21).

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1 This guidebook was developed and copyrighted by Robert P. Crosby of the Leadership Institute of Seattle, Inc. It is adapted and used here with his permission.
Organization Suggested for This Task

Choose a secretary—not a chairperson. The secretary is asked to submit to the facilitator the information requested on Page 19 or on Postscript 4. (A chairperson is not recommended because a team can become fixated on this role. Instead, it is recommended that the leadership simply emerge and perhaps shift spontaneously.)

This guide is intended only to assist you and your fellow team members in your work process. At no point does it attempt even slightly to influence your opinion or your team’s conclusion. It does attempt to support problem-solving methods that have been found to be effective and to help you avoid traps.

READ THE ENTIRE GUIDE BEFORE YOUR TEAM BEGINS.

The next page uses the words issue and goal.

Avoid Trap 1—getting hung up on words like issue, goal, or problem.

Some people prefer to talk about goals (“a positive approach,” they say); others about problems (“everybody has problems, so why not admit it’’); others about issues (“it’s more neutral”). But all goals reflect implicit problems, and all problems and issues reflect implicit goals.

Clarification of Issue or Goal

Off the top of your head, write the issue or goal that you think your team is working on:

When you have written the issue or goal, compare it with what others have written. If all agree, turn to Page 9; if not, turn to the next page and read about Trap 2.
Avoid Trap 2—arguing about the issue or goal.

Instead, inquire into each team member’s understanding and then either:
1. Agree on a common issue; or
2. If you cannot agree soon, split into subgroups.

Write the issue below.

You are ready to begin solving the problem.

Your TASK is to work on your team’s issue and eventually to come up with a recommendation to the appropriate decision-making group or a plan for further work that may result in a recommendation of action on your part.

The product—a recommendation or an action—is most likely to be effective if you use the following steps:

1. Make sure all team members are clear about the issue (see Page 7).
2. Analyze before solving (see Page 10).
3. Brainstorm action ideas (see Page 16).
4. Select action ideas (see Page 18).
5. Write the recommendation (see Page 19).

The problem-solving process recommended in this guide may help you avoid the common traps that teams fall into when trying to accomplish such a task. If you have trouble, see Postscript 1.
This is an analysis of your issue.

It will help *avoid Trap 3*—the premature suggestion of solutions before a careful analysis.

List the forces\(^2\) that prevent you from reaching your goal or that prevent you from finding an effective solution.

**WORK ALONE.**

Write your team’s issue in the space below.

\(^2\) Forces may be personal, interpersonal, institutional, or societal; they may be values, conflicts, attitudes, a lack of skills or knowledge or time or energy, power conflicts, or poor communication. See Postscript 2 for a rationale.
Start by writing each individual’s forces on newsprint. Now discuss what each has written in an inquiry mode (that is, paraphrase, try to understand rather than disagree, and help each person illustrate his or her point). Add additional forces as they occur to you.

**Avoid Trap 4**—arguing during this step.

Critical judgment is crucial to problem solving *but not at this time*. This is a time to *suspend* critical judgment and let your mind expand by understanding the views of others. Create an accepting, inventive mood in your team rather than a fighting, competitive mood.

At this time put up a sheet of newsprint with the words INFORMATION NEEDED. As forces are being clarified, keep asking, “What additional data do we need?” Then jot down your ideas on this sheet of newsprint. Whenever there is a clear difference of opinion, do not waste time arguing. Instead, clarify what information is needed and check with the resources available for the requested data. You may eventually differ—even turn in recommendations that differ—but get to the facts first.

Assign someone to be responsible for continually asking, “Do we need more facts?”
Now is the time to use CRITICAL JUDGMENT.

1. Go over the forces and agree on the 3, 4, 5, or 6 forces that you think are most important.
2. Rate the forces just chosen for solvability (by you or someone available).
3. Circle the solvable, important forces.

Avoid Trap 5—endlessly discussing or arguing about unsolvable items or opinions without accurate data.

Avoid Trap 6—ranking (that is, first, second, third); instead, choose several forces that can be considered “most” important, several that can be considered “less” important, and several that can be considered “least” important.

You have been working on a task.
Like a car, a team needs maintenance. While working on a task, a team needs to be explicit about its problem-solving and interpersonal processes.

Avoid Trap 7—working on a task as if you can avoid the maintenance of the team and still have a good product.

(Turn the page immediately after reading this.)
Complete this page individually. Then read Page 15 before discussing it. You will be asked to share what you write with your fellow team members.

(Circle a number)

<table>
<thead>
<tr>
<th>What I say is prized and valued here</th>
<th>What I say is being ignored here</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 5 4 3 2 1</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Our team is falling into traps</th>
<th>Our group is avoiding traps</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 5 4 3 2 1</td>
<td></td>
</tr>
</tbody>
</table>

When you have completed this form, *but before talking*, turn the page.

---

Read this page; then talk about your rating.

HELPFUL You tend to be *helpful* when you are specific (that is, “I felt prized by you, John, because often you asked me to say more when I spoke” or “An example of when I thought we fell into a trap is...” or “I felt put down when you...”).

NOT HELPFUL You tend to be judgmental and *not helpful* when you are general and evaluative (that is, “You’re the kind of person who puts people down” or “This team isn’t working well”).

Now talk about your ratings using specific illustrations. Pay special attention to different ratings. Invite those whose perceptions differ from yours to describe what they saw. Plan ways to improve your team’s effectiveness during your work on the rest of your issue.

Take ten to fifteen minutes for this discussion. When you have completed the discussion, turn the page.

Turn to Postscript 3 for a further rationale.
Now write on newsprint the several important, solvable forces that you arrived at by following the instructions on Page 12.

**This is another time to SUSPEND critical judgment.**

Brainstorm and list on newsprint some ways (action ideas) to reduce the restraining forces.

When you brainstorm:

- Nobody says, “No.”
- Nobody says, “It will never work.”
- Nobody says, “That’s a poor (or good) idea.”
- Nobody says, “That’s already been mentioned.”

When you run out of brainstorming ideas, turn the page.

-----------------------------------------------------------------------------------------------------------

Next, using an inquiry mode (see Postscript 1 to review the inquiry mode), work for a clear understanding of each of the action ideas. (During this inquiry you may wish to restate any ideas that are unclear.)

Continue to suspend critical judgment until after clarification has been achieved.

After clarification turn the page.

-----------------------------------------------------------------------------------------------------------
This is another time to USE critical judgment.

1. Select several action ideas.
2. Decide what group(s) or person(s) should expedite these action ideas.
3. Formulate your action ideas into recommendations.³

If your team is developing its own action strategy as a part of its recommendation or instead of its recommendation, heed this:

**WARNING**

If you want action, do not leave this meeting until you know clearly *who* will do *what, when, how, and how you will know* it has been done.

---

This recommendation is addressed to: _____________________________________

(Appropriate decision-making body)

**RECOMMENDATION:**

Names and phone numbers of the team members (place an asterisk to the left of the two who are to be contacted if necessary):

You may turn in more than one recommendation.

---

Check with your “appropriate decision-making body” to see if that group will make the following commitment. Perhaps the members of that group will be even more specific.

“WE WILL DO OUR BEST TO HAVE ALL RECOMMENDATIONS RESPONDED TO IN A WAY THAT YOU CONSIDER RESPONSIBLE.”

---

³ If your team is not submitting a recommendation, use Postscript 4 rather than the form on the next page.
If there is to be a report meeting:

1. Check the amount of time you have been given.
2. Choose a spokesperson.
3. Let the spokesperson practice on the team.
4. Help the spokesperson revise or shorten the report.

In large programs, thirty-second reports have been found to be effective—in fact, exciting.

Report the issue, the important and solvable forces, and the recommendation.
If You Have Trouble

A disagreement is inevitable. It is neither desirable nor undesirable. Disagreement is important to the health of your team. Each of you is different. You will be likely, therefore, to disagree.

However, a disagreement will be destructive if it is:

1. Avoided; or
2. Exclusively argumentative (as expressed in the attitude “I disagree and must convince you”).

It will be constructive if it is done in an inquiry mode.

Inquiry Mode:
I disagree and want to find out:

1. Do I understand your viewpoint correctly?
2. What assumptions or opinions or facts do you have that cause you to take that point of view?
3. What information can we request from available resources to help our inquiry?

In an inquiry mode:

1. I can paraphrase (repeat to you the meaning—not the exact words—that I received) and ask you to correct my understanding.
2. I can inquire about your assumptions, opinions, or facts. I can invite you to do the same for me.

If it seems to a third party that there is a disagreement and no change in point of view, or if persons persist in arguing or avoiding without inquiry, you may:

1. Follow the suggestions on Page 8.
2. Take a personal risk (maybe without team approval) and call in a facilitator. Perhaps facilitators or resource leaders are on call to help your team.
Postscript 2

Rationale for Looking at Restraining Forces

You are asked here to focus on restraining forces because these are frequently overlooked.

Change will happen when the real restraining forces are reduced. Remember that the forces you have listed are opinions and not necessarily facts. Keep asking, “How can we know whether these forces are really operating?” Use your INFORMATION NEEDED newsprint sheet and check with outside resources when needed.

Do not assume that your forces are accurate. Check them out or acknowledge that they are private opinions, perhaps incorrect.

How about a supporting force or forces pushing toward the goal you want? You may want to list such forces and (when you get to Page 16) suggest ways to use them to achieve your goal or resolve your issue successfully.

Postscript 3

A Further Rationale for Looking at Process

The deeply personal and human feelings of being prized or ignored, whether they are influential or not, can and must be understood in order to increase the probability of success in a problem-solving situation.

If these feelings are not taken into account, creativity is stifled and problem solving is adversely affected.

Look at it this way:

You have a task to complete. You are working on the task in a certain way or with a certain process.

The two questions asked on Page 14 are about the process of working. It is like stopping at a service station for maintenance on your car.
Postscript 4

The following is information requested from the secretaries of teams that do not turn in a recommendation:

1. State the issue:

2. List the forces arrived at by following the instructions on Page 12, Item 3:

3. State why the team did not turn in a recommendation.

4. Describe your team’s further plans to meet, if any.

5. List the members of your team and their phone numbers:

Put asterisks to the left of the names of two persons on the list who are to be called if necessary for further information.

Secretary’s Name ________________________________ Phone ______________
FISHING FOR “WHY?”: ANALYZING CAUSE AND EFFECT

Goals

- To give the participants a chance to analyze the causes of an effect (a result, an issue, or a problem).
- To offer the participants an opportunity to create a pictorial view of the multiple causes of a given effect, using the Fishbone or Ishikawa Diagram (Ishikawa, 1987) combined with the Affinity Diagram (Brassard, 1989).
- To encourage the participants to use creativity in generating hypotheses for causes and exploring the connections among the ideas generated.
- To establish the process of analyzing the causes of an effect as a step in a larger problem-solving process.

Group Size

An ongoing group of four to twelve members. To complete the activity, the members must choose an issue (an “effect”) that they want to work on.

Time Required

Approximately one to one and one-half hours.

Materials

- Two sheets of newsprint taped to a wall, side by side.
- Several (at least four) pads of 3” x 5” Post-it™ Notes in one color and one pad in a different color.
- Two felt-tipped markers in one color and one felt-tipped marker in a different color.
- Masking tape for posting newsprint.

Physical Setting

A room with movable chairs for the participants. It is preferable to have wall space for posting newsprint; but if wall space is not available, the newsprint sheets may be taped to a tabletop.

If the newsprint sheets are taped to a wall, the chairs should be placed in a semicircle with the opening facing the facilitator and the newsprint. If the sheets are taped to a tabletop, the chairs should be placed around the table in such a way that all participants can see the newsprint.
Process

1. The facilitator introduces the objective of the session: to generate ideas for the causes of a particular effect (a result, an issue, or a problem) of interest to the group. The participants are told that they will be “fishing” for multiple answers to the question “Why?” in connection with the chosen effect.

2. The participants are instructed to decide on an issue that they want to discuss (an “effect” that they want to explore). They are told that they may choose an issue just for fun if they wish (since the objective is to learn the process) or that they may choose an issue they feel they need to address. The facilitator suggests an example of an issue or effect—“reports submitted late”—and then suggests examples of possible causes: “information to be included in reports received late from Marketing,” “reports perceived as having low priority,” and “task overload among preparers of reports.”

3. The facilitator draws an illustration of a fish's head and spine on the posted newsprint and labels the head with the effect to be discussed (see Figure 1). The spine of the fish is created by drawing a horizontal line across the middle of the newsprint sheets and adding a tail.

4. Two recorders are chosen. Each is provided with at least two pads of Post-its™ and a felt-tipped marker. (All Post-its™ given to the recorders are the same color, and so are the markers.)

5. The group is asked to brainstorm the causes of the effect. The facilitator reviews the ground rules for brainstorming:
   - Take turns calling out ideas.
   - Treat every idea as legitimate; do not discuss or evaluate ideas when they are presented.
   - Build on one another's ideas.
   - Press for more ideas when thinking seems to be slowing down. Conclude when all ideas have been exhausted.
The facilitator also explains that the recorders are to take turns writing ideas on Post-its™ as these ideas are presented (one idea per Post-it™) and are to participate in the brainstorming as well. If rephrasing of an idea is required, the recorder must obtain approval from the person who contributed the idea. As ideas are written, the recorders place the Post-its™ on the newsprint in a configuration framing the sheets (see Figure 2). (Approximately fifteen minutes: five minutes to explain the process and approximately ten minutes for brainstorming.)

6. After ten minutes (or when all ideas have been exhausted), the facilitator stops the brainstorming process. Each idea is clarified as necessary. The facilitator explains that clarification consists of an explanation of meaning from the person who generated the idea, not a defense of that idea. (During this step, duplicate ideas need not be eliminated, as they provide an indicator of agreement.) (Five to ten minutes.)

7. All participants are instructed to arrange the ideas on Post-its™ into groupings that seem logical, thereby completing the skeleton of the Fishbone Diagram by using Brassard’s (1989) Affinity process. The facilitator explains how this process works:

- The participants are encouraged to work silently.¹

![Figure 2. Arrangement of Ideas Placed by Recorders](image)

¹ Typically the participants lapse into talking and negotiating, and such conversation should not be discouraged during the later stages of the Affinity process.
Anyone may put a Post-it™ idea in any grouping; if another participant does not like where an idea lands, he or she may move the idea.²

New ideas or duplicates may be created for separate groupings.

A single idea may form a “grouping” by itself.

(Ten to fifteen minutes.)

8. Once the participants seem content with the configuration of ideas and categories, the facilitator asks them to name the categories and gives these examples of category names: “Communication,” “Staffing,” and “Time Management.” As each category is named, the facilitator writes its name on a Post-it™ (in the felt-tipped marker that is

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² During step 7, if there is a great deal of controversy about groupings in which particular ideas should be placed, the participants may create a grouping labeled “To Be Discussed” for controversial ideas. Then, at the conclusion of the Affinity process, the facilitator should assist the participants in determining final categories for any ideas that have been designated “To Be Discussed.” (It is also permissible to create a category labeled “Other.”)
a different color from that used for the ideas) and places that Post-it™ above or below the ideas to which it pertains (see Figure 3). (Five to ten minutes.)

9. The facilitator asks the participants what they think the next step in the process needs to be. (Possible answers might be to gather information, to generate solutions, to establish criteria for solutions, to discuss each cause, or to develop theories about the cause.) Once the participants have achieved consensus about the next step, the facilitator writes the action on newsprint and labels it “Next Step.”

10. The facilitator creates a record of the diagram by (1) taking a photograph of it and giving the photograph to the group, (2) giving it to the group as is, or (3) and drawing a reduced version of it for the group.

11. The facilitator leads a concluding discussion based on the following questions:
   - What is your reaction to using the Fishbone and Affinity processes?
   - What are some dos and don’ts in using these processes?
   - What did you learn about discovering causes for effects by using the Fishbone and Affinity processes?
   - In what other ways might you use these processes in your organization?
   (Fifteen minutes.)

**Variations**

- If all present (including the recorders) have knowledge of the causes and want to participate in idea generation, each person can write his or her ideas on Post-its™ and then place them on the established newsprint sheets. It is important, however, that this procedure be followed with some form of brainstorming so that synergy is developed and additional ideas are generated.

- In step 7 the participants may predetermine categories. The following are examples:
  - Materials, people, equipment, methods, environment;
  - People, provisions, procedures, place, patrons (for service professions);
  - Who, what, when, where; and
  - The parts of a process.

- For additional input, the participants may place the newsprint diagram in another space in order to capture the contributions of people outside the group. Instructions, Post-its™, and felt-tipped markers should accompany the diagram.

- This activity is an excellent adjunct to a training program on continuous improvement.

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3 Although this is a traditional use of the Fishbone Diagram, it is the author’s opinion that fitting ideas into predetermined categories tends to hamper creativity.
REFERENCES AND SUGGESTED READING


Submitted by M.K. Key. The author wishes to acknowledge the work of Diana Best and Phyllis Virgil and the many quality-improvement coaches who have worked to test and refine this technology.
TEAM CHECKUP: MONITORING AND PLANNING FOR PROGRESS

Goals
- To offer team members a way to evaluate and monitor the progress of their team.
- To encourage team members to devise priorities and action plans for improving their team.
- To encourage team members to execute action plans for team improvement.

Group Size
All members of an ongoing team.

Time Required
One hour and forty minutes to two and one-half hours (excluding prework), depending on the size of the team.

Materials
- A copy of the Team Checkup Questionnaire for each team member.
- Newsprint sheets listing the team members’ responses to the questionnaire items (prepared in advance). A separate sheet (or sheets) should be created for each item.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting
A room in which the team members can work without interruption. Movable chairs should be provided, and plenty of wall space should be available for posting newsprint.

Process
1. Prework 1: The facilitator distributes copies of the Team Checkup Questionnaire and asks each team member to complete this questionnaire and return it to the facilitator at least twenty-four hours before the activity session. In explaining the activity, the facilitator states that undergoing a team “checkup” will help the members to form a picture of the team’s present situation; then they can decide in which direction they want to move in the future. The facilitator says that he or she will be recording the team members’ responses from the completed forms, but assures the members that those responses will remain anonymous. (Five minutes.)
2. **Prework 2:** Once all members’ completed questionnaires have been collected (approximately a day before the activity session), the facilitator records on sheets of newsprint all responses to each individual item so that everyone’s views can be displayed during the activity session. (A *minimum of one hour* to record data.)

3. At the beginning of the activity session, the facilitator posts all newsprint sheets with the members’ recorded responses. The facilitator leads a discussion of each item, striving for understanding and consensus on each. (One to one and one-half hours.)

4. The facilitator instructs the team members to focus on suggestions for improvement (item 4 on the questionnaire) and asks if there are now additional improvement ideas. Any new ideas are recorded on newsprint and clarified as necessary. Then all improvement ideas are reviewed, and similar ideas are assembled into categories. The members may want to eliminate any plans for improvement that are already in motion or that are not within the team’s control. From the remaining list the team members choose the top one to three priorities. (Note: The team should not work on too much at once; one to three improvement items are enough. After the initial items have been tried and modified as needed, other items may be tackled.) (Twenty minutes.)

5. The team members are assisted in devising action plans from the list of priorities. The four critical elements (*who* will commit to action, *what* will be done, *by when*, and *how you will know your actions are working*) are determined and recorded on newsprint. The facilitator keeps the newsprint action plans so that he or she can create a handout from them and distribute a copy to each team member. (Twenty to thirty minutes.)

6. The facilitator leads a discussion of the activity based on questions such as the following:
   - What did you learn about yourself as a team member?
   - What did you learn about your fellow team members?
   - What did you learn about working together as a team?
   - How can you use what you learned to address team issues in the future? (Ten minutes.)

7. The facilitator encourages the team members to meet every few months to fill out the questionnaire again, to review progress, and to modify goals as necessary.

**Variations**

- Instead of administering the questionnaire, the facilitator may interview each team member separately and record his or her responses to the items on the questionnaire form. The facilitator should clarify for everyone that responses will be shared but will remain anonymous. Subsequently, all responses to each item should be recorded on newsprint. The activity then begins at Step 3.
The facilitator may, if appropriate, encourage the team members to own their responses during the discussion of the questionnaire items. (However, the members must not feel pressured to relinquish the anonymity of their responses.)
TEAM CHECKUP QUESTIONNAIRE

1. How would you describe the interactions when the members of your team get together to plan, solve problems, or make decisions?

   Have interactions improved or worsened in the past two or three months? What have you observed that tells you this?

2. How would you describe the team’s relationships with outside groups (for example, other teams or units, other organizations, suppliers)?

   Have these relationships improved or worsened in the past several months? What have you observed that leads you to this conclusion?
3. What are your team’s greatest strengths?

   How can you build on these strengths?

4. What two or three things does your team need to improve?

   What are you as an individual doing to improve these things? What is the team as a unit doing to improve these things?

   What could you and the team do that you are not doing now?

5. How would improving the things identified in item 4 benefit your team’s planning, problem solving, decision making, member interactions, or relationships with outside groups?
TURBO AFFINITY TECHNIQUE:
CHOOSING TEAM-IMPROVEMENT PROJECTS

Goals
- To assist team members in quickly assigning categories to one hundred or more previously identified issues/ideas that can serve as the basis for selecting team projects.
- To acquaint team members with a quick form of the Affinity Technique (Brassard, 1989) that they can use for problem solving and decision making.

Group Size
All members of an ongoing team, assembled into two subgroups of approximately equal size. The activity works best with an ongoing team of eight to fourteen members (two subgroups of four to seven each).

Time Required
One to one and one-half hours.

Materials
- Each previously identified team issue/idea printed in large, black letters on a slip of paper 8" wide by 2" long (prepared in advance by the facilitator). The slips should be numbered sequentially.
- A newsprint reproduction of the Turbo Affinity Technique Verbal Instructions (prepared in advance by the facilitator). Note: More than one sheet of newsprint may be required.
- A newsprint reproduction of the Turbo Affinity Technique Graphic Instructions (prepared in advance by the facilitator). Note: More than one sheet of newsprint may be required.
- Four blank sheets of newsprint for each subgroup. Prior to conducting the activity, the facilitator tapes four sheets of newsprint to the wall, side by side, in each subgroup’s assigned work station.
- Several water-soluble, felt-tipped markers for each subgroup.
- A newsprint flip chart and a water-soluble, felt-tipped marker for the facilitator’s use.
- Masking tape for posting newsprint.

1 Providing the team members with instructions in two formats accelerates comprehension. Those who comprehend better with verbal learning aids will grasp the verbal instructions more quickly, and those who comprehend better with graphic learning aids will grasp the graphic instructions more quickly.
**Physical Setting**

A large room, with the subgroups’ assigned work stations set up at opposite ends of the room so that the subgroups do not disturb each other.

Before the team members arrive, the facilitator posts the newsprint instruction posters (both verbal and graphic) on the wall in such a way that both subgroups can see the instructions from their work stations.

**Process**

1. Prior to the activity session, the team leader tells the members that they will be spending an hour or less assigning categories for the issues/ideas they identified previously. The leader further explains that the members will use those categories as the basis for selecting projects.

2. As the team members arrive for the activity session, the facilitator directs them to one of the two subgroup work stations.

3. After all members have been assigned to subgroups, the facilitator calls their attention to the instruction posters, briefly explains the activity, and emphasizes the following points:

   - While someone is taking a turn at placing issue slips, the other members *may not talk and may not interfere with the process*. However, after that person has finished, the members may change issue slips from column to column if they all agree to the changes.
   - A slip can become a column by itself if it does not fit anywhere else. However, it can be left there at the conclusion of sorting only if all members agree.

   (Five minutes.)

4. The facilitator gives an approximately equal number of issue slips to each subgroup and tells the subgroup members to divide the slips approximately equally among themselves. Each subgroup also receives several water-soluble, felt-tipped markers for labeling columns once they have been established. Then the subgroups are told that they should complete the task in approximately twenty minutes and are asked to begin.

5. After about twenty minutes, when the moving of issue slips between columns is winding down, the facilitator instructs the subgroups to select a category or heading to describe the issues in each column.

6. After both subgroups have established categories, the facilitator asks the members of each subgroup to bring their newsprint sheets to one long wall of the room, where they are posted for everyone to see. The facilitator posts the sheets and leads a total-team review of all categories created thus far.

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2 At this time the facilitator shows the members the issue slips so that they know what they will be dealing with.
7. The facilitator helps the team to combine (and rename, if necessary) categories that are essentially the same. The team may move an issue slip from one category to another if all members agree. (Five minutes.)

8. The facilitator helps the team to combine (and rename, if necessary) categories into larger ones. (Ten minutes.)

9. The facilitator assists the team in a final assessment of each category. Changes are made if new ideas emerge and all members agree. (Five minutes.)

10. The team leader is asked to remove the final newsprint and to have it reproduced and distributed to all team members.

11. The facilitator leads a concluding discussion based on these questions:
   - How did you feel about using this technique? What are its advantages? Disadvantages?
   - What did you learn about using this technique?
   - In what other areas might this technique be applied?
   (Ten minutes.)

**Variations**

- If the team has only four to six members, the activity may be conducted without subgroups.
- After Step 9 the team may choose a category as a project.

**REFERENCE**

1. Form two subgroups, A and B.
2. Take issue slips from facilitator. (Your subgroup gets half; other subgroup gets half.)
3. In your subgroup, divide issue slips equally among yourselves.
4. Choose the two issues that are most different and affix those slips to opposite ends of newsprint.
5. Have one member begin by placing issue slips into columns of related items, based on gut feelings. No one talks.
6. Switch members. New member places issue slips, again based on gut feelings. Process continues until all members have taken a turn.
7. After someone’s turn, change issue slips from column to column if you think necessary. An issue can be moved again and again, but all members should agree on the final position.
8. Put a slip in a column by itself if it does not belong anywhere else (i.e., a “maverick” issue). Leave it there after final sorting if all members agree.
9. Name each vertical column as a category. Write name above column.
TURBO AFFINITY TECHNIQUE
GRAPHIC INSTRUCTIONS

1. 2 Subgroups

   A
   
   B

2. Issue Notes

   #1
   
   #51

   #50
   
   #100

3. Most Different
   (Opposite Ends)

   Issue
   
   Issue

4. Issues in Columns

   Column
   
   Column

   (etc.)

5. Rotate Members

   Issue
   
   Issue

   (Maverick Issue)

6. Move Issues
   (Consensus)

   Column
   
   Column

7. Name Columns

   Name (Category)

   Issue
   
   Issue
HIT THE TARGET FAST: DESIGNING A COMMUNICATION SYSTEM FOR TEAMS

Goals
- To help team members gain awareness of the elements that constitute a team-communication system that is effective in situations involving time pressure.
- To offer team members an opportunity to design such a system.
- To offer team members an opportunity to become more aware of how they communicate when under time pressure.

Group Size
Three to five ongoing work teams (as many as thirty participants). The activity works best with teams of four to six members each; if a team has eight or more members, it should be split into two subgroups.

Time Required
One hour and twenty to thirty-five minutes.

Materials
- A copy of the Hit the Target Fast Task Sheet for each team member.
- Blank paper and a pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- A newsprint flip chart and several colors of felt-tipped markers for each team.
- Masking tape for posting newsprint.

Physical Setting
A room large enough so that the teams can work separately without disturbing one another. Movable chairs must be provided. Tables are useful but not essential; if tables are available, the clipboards or portable writing surfaces are not necessary.

Process
1. The facilitator introduces the activity by stating its goals.
2. The teams are assigned to separate areas. The facilitator distributes copies of the Hit the Target Fast Task Sheet, blank paper, pencils, and clipboards or other portable
writing surfaces. In addition, each team is given a newsprint flip chart and several markers in different colors. The team members are instructed to read the handout. After everyone has read it, the facilitator elicits and answers questions about the task. The facilitator also states that at the conclusion of the task, one or more representatives from each team will be asked to give a three-minute presentation describing their team’s communication system and why/how it will work effectively in the situation. The teams are encouraged to create newsprint posters to illustrate their communication systems. (Ten minutes.)

3. The facilitator informs the teams that they have twenty-five minutes to complete the task and asks them to begin. As they work, the facilitator circulates from team to team to answer questions and to keep the teams informed of the remaining time. (Twenty-five minutes.)

4. After twenty-five minutes the facilitator calls time, reassembles the total group, and asks the teams to take turns presenting their communication systems. After each presentation the facilitator encourages feedback by asking (1) whether and to what extent the system meets the criteria on the task sheet and (2) how the system might be improved. (Twenty to thirty-five minutes, depending on the number of teams.)

5. The facilitator leads a discussion based on these questions:
   - What was your experience as you worked under time pressure with your team?
   - How would you describe the way your team generally communicates under time pressure? How is your approach similar to the one you designed for the gunnery team? How is it different?
   - How is your team’s communication under time pressure different from its usual pattern of communication?
   - What have you learned about effective communication under time pressure?
   - How can your team communicate more effectively under time pressure? What obstacles might you face in implementing a new system? How could you overcome those obstacles?

   (Twenty minutes.)

Variations

- After Step 5 the individual teams may reassemble to design communication systems for their own use when they are under time pressure.
- This activity may be used with a single team as part of a team-building session.
- To include an element of competition, the facilitator may tell the team members that the first team to complete the task wins.

Submitted by Lynn A. Baker, Sr.
**HIT THE TARGET FAST**

**TASK SHEET**

**The Situation**

A four-member gunnery team wants to practice in preparation for combat. Their weapon is a mortar, designed for lobbing shots to out-of-sight targets. Their practice target is one-half mile from the mortar and cannot be moved closer. A hill fifty feet high is between the mortar and the target, blocking direct view. The diameter of the target is thirty yards.

The following resources—and only these—are available to the members of the gunnery team. The members need not use all of them.

- A battery-powered buzzer with extra wire (assume any length);
- A flagpole (not implanted; assume any length);
- A bag of triangular-shaped flags (assume any number and colors) plus cord (any length);
- A shovel;
- A ladder (assume any length);
- A pair of binoculars; and
- Ammunition (plenty is available, but the fewer the number of rounds required to hit the target, the better).
The Task

The members of the gunnery team know how to fire and adjust the mortar, but they do not know how to hit the target accurately and quickly. Your team’s task is to design a communication system for them, addressing (1) how they can deploy or position themselves, (2) how they can use the available resources, and (3) how they can communicate effectively.

The system you design must work for the team members not only during practice, but also in an actual combat situation—when they must act quickly and efficiently to hit the target and still protect themselves. That system should:

- Be clear and easy to understand;
- Be quick to implement;
- Account for things that could go wrong; and
- Incorporate safety measures to protect the members of the gunnery team.
TEAM SELF-EVALUATIONS: A COLLECTION OF INSTRUMENTS

Goals
- To help a team to evaluate its own functioning.
- To provide a way to examine objectively the participation of team members.
- To explore the norms that have developed in a team that has been in existence for some time.

Group Size
All members of an ongoing team.

Time Required
Varies according to the evaluative procedures used.

Materials
- Enough copies of one of the following forms to accommodate all of the team members:
  - Group-Climate Inventory;
  - Group-Growth Evaluation Form;
  - Feedback Rating Scales; or
  - Post-meeting Reactions Form.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
The team members should be seated comfortably for writing. They should also be able to see the posted results.

Process
Each of the four forms (see Materials) focuses on some aspect of group life that the facilitator may wish to discuss. A general process is suggested for the use of one of these inventories.
1. After a typical meeting of an ongoing team, the facilitator distributes copies of the form selected. Members are instructed to complete the form individually.

2. As soon as members have completed their forms, the data are posted on newsprint.

3. The facilitator leads a discussion of the data, eliciting specific instances of behavioral trends. He or she may offer appropriate theory material during this analytical stage.

4. The team members are asked to plan new behavior for the next meeting in light of the findings.

Variations
- The facilitator may wish to use a different form at the end of each meeting in a sequence. Or the same form may be used several successive times, in order to study trends in the data; a team may thus chart its progress toward effective functioning.
- Participants can predict the results of the analysis.
- Forms may be modified to elicit expectations from new team members.
- Team members can collaborate on designing an instrument to measure the growth of the team.

Scoring Instructions: Group-Climate Inventory
Items 3, 6, 9, 12, and 16 are negative behaviors; they should be scored first: A=0, T=1, U=2, S=3, R=4, and N=5. All other items are scored the reverse: A=5, T=4, U=3, S=2, R=1, and N=0. The ratings in each of the four columns may then be added to obtain scores for each of the following aspects of group climate:
- Column 1. Genuineness;
- Column 2. Understanding;
- Column 3. Valuing; and
GROUP-CLIMATE INVENTORY

Directions: Think about how your fellow team members as a whole normally behave toward you. Within the parentheses in front of the items below, write the letter that corresponds to your perceptions of their behavior.

A—They can always be counted on to behave this way.
T—Typically I would expect them to behave this way.
U—I would usually expect them to behave this way.
S—They would seldom behave this way.
R—They would rarely behave this way.
N—I would never expect them to behave this way.

I would expect my fellow team members to:

1. (___) level with me.
2. (___) get the drift of what I am trying to say.
3. (___) interrupt or ignore my comments.
4. (___) accept me for what I am.
5. (___) feel free to let me know when I am annoying them.
6. (___) misconstrue things I say or do.
7. (___) be interested in me.
8. (___) provide an atmosphere in which I can be myself.
9. (___) keep things to themselves to spare my feelings.
10. (___) perceive what kind of person I really am.
11. (___) include me in what is going on.
12. (___) be “judgmental” toward me.
13. (___) be completely frank with me.
14. (___) recognize when something is bothering me.
15. (___) respect me, apart from my skills or status.
16. (___) ridicule or disapprove of my peculiarities.
GROUP-GROWTH EVALUATION FORM

Directions: Rate your team on each characteristic, both as the team was initially and as it is now. Use a seven-point scale with 7 as the highest rating.

**Climate**

<table>
<thead>
<tr>
<th>Initially</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>1.</td>
<td>I am treated as a human being, not as just another team member.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>2.</td>
<td>I feel close to the members of this team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>3.</td>
<td>This team displays cooperation and teamwork.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>4.</td>
<td>Membership in this team is aiding my personal growth.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>5.</td>
<td>I have trust and confidence in the other members of this team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>6.</td>
<td>Members of this team show supportive behavior toward one another.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>7.</td>
<td>I derive satisfaction from my membership in this team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>8.</td>
<td>I feel psychologically close to this team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>9.</td>
<td>I get a sense of accomplishment from my membership in this team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>10.</td>
<td>I am being honest in responding to this evaluation.</td>
</tr>
</tbody>
</table>

**Data Flow**

<table>
<thead>
<tr>
<th>Initially</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>11.</td>
<td>I am willing to share information with other members of the team.</td>
</tr>
<tr>
<td>______</td>
<td>______</td>
</tr>
<tr>
<td>12.</td>
<td>I feel free to discuss important personal matters with team members.</td>
</tr>
</tbody>
</table>
### Goal Formation

<table>
<thead>
<tr>
<th>Initially</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13. I am oriented toward personal goals rather than toward team objectives.</td>
</tr>
<tr>
<td></td>
<td>14. When solving problems, this team uses integrative and constructive methods rather than a competitive approach.</td>
</tr>
<tr>
<td></td>
<td>15. I am able to deal promptly and well with the important problems of this team.</td>
</tr>
<tr>
<td></td>
<td>16. The activities of this team reflect a constructive integration of the needs and desires of its members.</td>
</tr>
<tr>
<td></td>
<td>17. My needs and desires are reflected in the activities of this team.</td>
</tr>
</tbody>
</table>

### Control

<table>
<thead>
<tr>
<th>Initially</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18. This team has a real sense of responsibility for getting a job done.</td>
</tr>
<tr>
<td></td>
<td>19. I feel manipulated by the team.</td>
</tr>
<tr>
<td></td>
<td>20. I think that I manipulate the team.</td>
</tr>
</tbody>
</table>
FEEDBACK RATING SCALES

“Feedback” is a communication to a person (or a group) that gives that person information about how he or she affects others. Feedback helps an individual to consider and alter his or her behavior and thus better achieve goals.

Below are eight criteria for useful feedback. Rate the feedback that usually occurs in your team by circling the appropriate number on each of the eight scales. You also may want to make some notes for each criterion, such as particular team occurrences.

1. **Feedback should be descriptive rather than evaluative.** It merely describes the sender’s reaction, thus leaving the recipient free to use it or not. By avoiding evaluative language, it reduces the likelihood that the recipient will respond defensively.

   Descriptive  1  2  3  4  5  6  Evaluative

   Comments:

2. **Feedback should be specific rather than general.** To be told that one is “dominating” will probably not be as useful as to be told “Just now when we were deciding the issue, you did not listen to what others said, and I felt forced to accept your arguments or to face attack from you.”

   Specific  1  2  3  4  5  6  General

   Comments:

3. **Feedback should take into account the needs of both the sender and the recipient.** Feedback can be destructive when it serves only the sender’s needs and fails to consider the needs of the recipient.

   Takes needs of both into account  1  2  3  4  5  6  Does not take needs of both into account

   Comments:

---

1 Adapted from theory session material contained in the NTL 1968 Summer Reading Book.
4. *Feedback should be directed toward behavior that the recipient can change.*
   Frustration is the only result when one is reminded of a shortcoming over which he or she has no control.

<table>
<thead>
<tr>
<th>Directed toward modifiable behavior</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directed toward nonmodifiable behavior</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comments:*

5. *Feedback should be solicited rather than imposed.* Feedback is most useful when the recipient asks a question that those observing him or her can answer.

<table>
<thead>
<tr>
<th>Solicited</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Imposed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comments:*

6. *Feedback should be well timed.* In general, feedback is most useful when given as soon as possible after the observed behavior (depending, of course, on the recipient’s readiness to hear it, on support available from others, etc.).

<table>
<thead>
<tr>
<th>Well timed</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poorly timed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comments:*

7. *Feedback should be checked with the sender.* For example, the recipient can rephrase the feedback to ensure that it has been understood properly.

<table>
<thead>
<tr>
<th>Checked with sender</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not checked with sender</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comments:*

8. *Feedback should be checked with others in the group.* In a work team or a training group, for example, both the sender and the recipient can check their feedback: Is it only one person’s impression, or is that impression shared by others?

<table>
<thead>
<tr>
<th>Checked with others</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not checked with others</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Comments:*
POST-MEETING REACTIONS FORM

Directions: Describe the meeting and your behavior by rank ordering each statement in each set from 1 (most like) to 10 (least like). Use this procedure: In each set, first identify the statement that you would rank 1, then the one that you would rank 10, then 2, then 9—alternating toward the middle of the scale.

The meeting was like this:

(   ) There was much warmth and friendliness.
(   ) There was much aggressive behavior.
(   ) People were uninterested and uninvolved.
(   ) People tried to dominate and take over.
(   ) We were in need of help.
(   ) Much of the conversation was irrelevant.
(   ) We were strictly task oriented.
(   ) The members were very polite.
(   ) There was much underlying irritation.
(   ) We worked on our process issues.

My behavior was like this:

(   ) I was warm and friendly to some.
(   ) I did not participate much.
(   ) I concentrated on the job.
(   ) I tried to get everyone involved.
(   ) I took over the leadership.
(   ) I was polite to all.
(   ) My suggestions were frequently off the point.
(   ) I was a follower.
(   ) I was irritated.
(   ) I was eager and aggressive.
MESSAGES: FEEDBACK AND COHESIVENESS

Goals

- To allow the team members to examine the thought process, verbal behavior, and risk factor involved in sending verbal messages about feelings.
- To offer the members an opportunity to analyze the ways in which the process of sending and receiving such messages contributes to team cohesiveness.

Group Size

All members of an ongoing team.

Time Required

Approximately forty-five minutes.

Materials

- A copy of the Messages Instruction Sheet for each team member.
- A sheet of paper and a pen or a felt-tipped marker for each team member.

Physical Setting

A chair and a writing surface for each team member. The chairs should be arranged so that each team member can see all of the others.

Process

1. The facilitator introduces the activity:

   “When we attempt to express our feelings verbally, the spontaneity and empathy of these feelings are often distorted by the thinking process itself. It is not uncommon to hear ourselves express feelings in statements such as ‘I think I’d like to say’ or ‘I thought I’d like to tell you.’ In essence, the problem with expressing feelings verbally is that we ‘filter’ our messages through the thinking mode. Before speaking, the person sending a message usually analyzes three factors:

   - The potential value of the message to the recipient;
   - Whether the message will be acknowledged with approval or disapproval; and
   - The degree of likelihood that the message will expose the recipient to embarrassment and/or the sender to humiliation.
However, there are times when each of us would like to be able to communicate feelings verbally without engaging in the filtering process; sometimes it is not only appropriate but also desirable to express feelings openly and honestly, without reluctance and without prior evaluation of the benefits and consequences involved. The activity that you are about to experience is intended to help you to do this.”

2. Each team member is given a sheet of paper, a pen or a felt-tipped marker, and a copy of the Messages Instruction Sheet. Everyone is asked to read the instructions and to begin. (Ten minutes.)

3. After all members have completed the task, they are asked to take turns presenting their cards to the team by reading aloud the messages written on these cards. It is specified that no verbal feedback is to be given during this step.

4. In response to the messages read during the previous step, the team members are invited to give any feedback or to make any statements they wish.

5. The facilitator states that although we often send actual greeting cards to others on special occasions, we seldom realize how important it is to send verbal “greeting cards” to develop interpersonal trust and cohesiveness within a team. It is also mentioned that during a team experience, it is important for the members to express their feelings about that experience in an open and honest manner. Then the facilitator leads a discussion of the entire activity by asking the following questions:

- How successful were you in avoiding the filtering process? How did you try to avoid it?
- What were your feelings and/or fears as you read your message? after you read it? How did you assess the impact of your message without verbal feedback?
- What is your experience of the level of trust in the team at this moment?
- What do you require from other team members in order to express your feelings spontaneously?
- What else would you like to express at this time?

**Variations**

- The facilitator may make the greeting-card assignment specific to a particular stage of team development. For example, the members may be asked to use a theme of announcement or friendship.
- Steps 3 and 4 may be combined so that when the team members read their messages, they may elicit and/or receive verbal feedback at that time.

Submitted by Gilles L. Talbot.
MESSAGES INSTRUCTION SHEET

Using the materials that you have been given, create a greeting card to be “sent” to this team. The message on your card should express the feelings you have experienced as a member of the team. You need not write your message in verse or rhyme unless you choose to do so. What is important is that the words you use convey your feelings openly, honestly, and without reluctance. Remember to avoid expressions such as “I think” that tend to dilute your feelings.
GRAPHIC ANALYSIS: DEVELOPING A TEAM

**Goals**
- To assess the development of the team with regard to task functions and personal relations.
- To compare members’ perceptions of the developmental status of the team at a given time.

**Group Size**
All members of an ongoing team.

**Time Required**
Approximately forty-five minutes.

**Materials**
- A pencil for each team member.
- A copy of the Graphic Analysis Form for each team member.
- A newsprint flip chart and a felt-tipped marker.

**Physical Setting**
Individuals should be seated far enough apart so as not to influence one another. They should be able to read a newsprint poster presented by the facilitator.

**Process**
1. The facilitator gives a brief lecturette on group development, stressing the movement from orientation to problem solving and from dependency to interdependence. He or she discusses the psychological climate of the group as a correlate of group growth. Each team member is given a copy of the Graphic Analysis Form as a part of the lecturette.
2. The team members are instructed to portray the group according to the directions on the form.
3. The team members’ marks are posted on newsprint, and the team discusses patterns in the perceptions of members. Members are encouraged to recall specific behaviors from recent team interactions that explain their perceptions.
**Variations**

- Instead of handing out copies of the form, the facilitator can instruct each member to locate the team’s development on a poster version of the form.
- The process can be augmented with a discussion of behaviors needed to facilitate the team’s growth toward optimal functioning.

Submitted by John E. Jones.
Instructions: On the graph below locate the levels at which you believe your team is functioning in both personal relations and task functions. Draw a line from each point until the two lines intersect on the graph.
STONES, BANDS, AND CIRCLE: SOCIOGRAM ACTIVITIES

Goals
- To explore existing levels of interaction, influence, and inclusion in a team.
- To develop an awareness of group dynamics.

Group Size
All members of an ongoing team.

Time Required
Approximately forty-five minutes to one hour per activity.

Materials
- For “Pile of Stones”: A collection of small stones—equal to approximately twice the number of team members—of varying color, size, shape, and texture.
- Masking tape (optional).
- Newsprint and a felt-tipped marker (optional for discussion).

Physical Setting
A room large enough so that the team members can move about with space between them.

Process
Pile of Stones
1. The facilitator explains that the members will create a symbolic picture of the team. He or she places a collection of stones in the middle of the team and directs each team member to examine the stones and then to select one stone that represents himself or herself in the team. (Three to five minutes.)
2. Team members are told to study their own stones and to try to identify with them. While they are doing this, the facilitator clears away the unselected stones. (Three to five minutes.)
3. The facilitator says that each member’s stone represents that person. He or she instructs the members to nonverbally create a diagram or “picture” of the team with
the stones. Each person is to place his or her stone in terms of where the team member sees himself or herself in the picture of the team: next to whom, in between or surrounded by whom, far away from or close to the stones of others, and included in or distanced from the majority of members. The facilitator allows ten minutes for this activity and gives a two-minute warning signal before the time is up.

4. The facilitator tells the team members to study the pattern of stones and then announces that the team members may now move their stones, without discussion, to more accurately reflect the position of each member in the team. (Five minutes.)

5. The facilitator leads the team members in a discussion of how their stones represent them, how they feel about their positions in the design, whether these accurately reflect their “places” in the team, how their positions in the team reflect their influence over others or others’ influence over them, and how their positions reflect who they interact with or feel close to in the team. (Fifteen minutes.)

6. The facilitator announces that any member may move his or her stone for the last time or ask another member to move that member’s stone to a particular location. The person being asked may either comply with or refuse the request. (Five minutes.)

7. The facilitator leads a discussion of the experience, focusing on finding one’s place in the team, members’ feelings about their positions and their relation to other members, and reactions to having members move away from them or being asked to assume different places in the team. These symbolic expressions are then related to actual team dynamics.

**Bands**

1. The facilitator tells the team that the following activity will be nonverbal. He or she places a marker (any object) in the center of the room and designates it as the center or nucleus of the team, symbolizing the goals and purposes of the team.

2. The facilitator instructs the team members to imagine that there are rings or bands around the nucleus, larger and larger circles, about two feet apart. He or she directs the members to position themselves on these bands, either nearer to or farther from the center of the team, depending on how closely their own goals and interests match the goals and interests of the team. The team members are reminded that the experience is nonverbal.

3. When members have positioned themselves, the facilitator instructs each member to remain on the band on which he or she is standing (that is, at that particular distance from the center); but all members are to attempt to move closer to people for whom they feel the greatest interpersonal attraction and farther away from those for whom they feel the most interpersonal distance by moving around the band. Members can also face toward or away from other members to indicate positive and negative
attractions. The facilitator tells them that they will have five minutes to reposition themselves and that there is to be no talking during this phase.

4. The facilitator tells the team members that without changing their positions on the bands or the directions they are facing, they are to indicate how much impact or control they have in the team by standing (most impact), kneeling (medium impact), or sitting (least impact) in place.

5. The facilitator tells the team members to remain in the places they are and begins a team discussion of the experience. Members are encouraged to describe their feelings about their positions and the positions of others in relation to them in terms of inclusion, influence, and distance.

6. After approximately ten minutes of discussion, the facilitator announces that members are released from their bands and positions if they choose to be. Any member may move within the team space, but will be requested to explain such a move to the member moved away from and to the member moved toward, including any changes in feeling that result from the move. The facilitator continues to lead the team in a discussion of members’ positions in relation to actual team dynamics. He or she may focus on how the places or positions assumed by members impact and reflect individual and team interests and goals.

**Circle**

1. The facilitator indicates an imaginary circle (large enough to accommodate all team members) within the room and says that the edges of the circle are the limits of the team’s existence—all team interactions take place within the circle.

2. The facilitator directs the team members to stand within the circle and tells them to concentrate on here-and-now behaviors, feelings, and needs while they mill about within the circle.

3. After one minute the facilitator directs each team member to place himself or herself physically in a position that best describes his or her relationship to the team and individual members. (Five minutes.)

4. The facilitator describes (without interpreting) the position of each team member in turn and solicits from the team member one word that best describes his or her own feelings at the moment. (Ten to fifteen minutes.)

5. The facilitator leads a team discussion of the existing interpersonal relationships and interactions between team members. (Five to ten minutes.)

6. The facilitator instructs the members to mill about within the circle for a minute and then to place themselves in what they would consider to be ideal positions within the team.
7. Team members are directed to discuss with the rest of the members their new positions and the feelings that are associated with these positions. The facilitator observes this interaction. (Ten to fifteen minutes.)

8. The facilitator assembles the team and leads a diagnosis of the interpersonal dynamics, team interpersonal weaknesses, team interpersonal strengths, and adequacy of the team structure to carry out tasks. He or she mentions the implications of the impact of the perceived inclusion, influence, and closeness on individual and team goals. The facilitator then leads a team discussion of interpersonal needs and the expectations of the team in terms of team structure and group dynamics.

---

“Pile of Stones” was submitted by Donald E. Miskiman. “Bands” was submitted by John E. Hoover and Melvin A. Goldstein. “Circle” was submitted by Donald Anderson.
PERSON PERCEPTION: FEEDBACK

Goals
- To provide feedback to individual team members about how they are perceived by others.
- To help the team members to clarify what underlies their tendency to categorize other people.

Group Size
All members of an ongoing team.

Time Required
Approximately one hour.

Materials
- A copy of the Person Perception Inventory Sheet for each team member.
- A copy of the Person Perception Recording Sheet for each team member.
- A pencil for each team member.

Physical Setting
The team members should be seated comfortably for writing.

Process
1. The facilitator discusses the goals and gives a brief overview of the activity.
2. The facilitator distributes a copy of the Person Perception Inventory Sheet and a pencil to each team member. He or she reads the directions aloud and answers any questions. The team members are instructed to complete the inventory.
3. The facilitator hands out copies of the Person Perception Recording Sheet and explains its use.
4. The facilitator calls for a volunteer to share his or her data; other members record information relevant to themselves. Then other team members volunteer in turn. (During this phase only questions for clarification are allowed—no reactions.)
5. After all the perceptions have been published, the facilitator instructs the team members to study their perceptions of others in order to determine what personal
dimensions they use in sorting out people. The team then discusses these
generalizations.

6. The facilitator focuses on members one at a time to determine their reactions to the
feedback they have received and calls for team discussion after each member’s
response.

7. The facilitator leads a discussion of the entire experience, focusing on such topics as
labeling, projection, characterization, and validation by consensus.

Variations
- The subgroupings can be posted on newsprint.
- A tally can be made of how many times each team member is paired with each other
  member, using a form such as the following:

```
   A   B   C   D   E...
   A
   B   ___
   C   ___  ___
   D   ___  ___  ___
   E   ___  ___  ___  ___
```

- Some of the subgroups can be convened so that the members of each can determine
  what they believe they have in common.
- Subgroup characteristics can be predetermined by the facilitator.
- Team members who are least frequently perceived as similar on the Person Perception
  Inventory Sheet can be paired and instructed to talk about both their differences and
  their similarities. (The same procedure can be used with pairs of persons most
  frequently perceived as similar on the inventory sheet.)

REFERENCE

Based on materials submitted by Robert H. Dolliver.
PERSON PERCEPTION INVENTORY SHEET

Instructions: In the spaces below, you are to form two subgroups from the membership of your team (including yourself). Record those characteristics that describe the ways in which the members of each subgroup are alike. People who do not fit into your two-category system are to be listed as “remaining members,” along with their unique characteristic(s).

Subgroup I

Members:

Common characteristic(s):

Subgroup II

Members:

Common characteristic(s):

Remaining Members

Name

Unique Characteristic(s):
**PERSON PERCEPTION RECORDING SHEET**

*Instructions:* On this sheet, record the perceptions that other team members have of you. Write the name of the person giving you feedback, the names of the other members with whom you were categorized, and the characteristic(s) of that subgroup. If you were not grouped, record the unique characteristic(s) attributed to you.

<table>
<thead>
<tr>
<th>Member Giving Feedback</th>
<th>Subgroup Members</th>
<th>Subgroup Characteristic(s)</th>
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AGENDA SETTING: A TEAM-BUILDING STARTER

Goals

- To create and rank order an agenda for a team-building session.
- To generate ownership of and commitment to commonly perceived problems facing a team.
- To develop effective listening skills.

Group Size

All members of an ongoing team. (This process is intended as an initial activity in a team-building program.)

Time Required

Approximately one hour.

Materials

- A newsprint flip chart, felt-tipped markers, and masking tape.
- Paper and a pencil for each team member.

Physical Setting

A room large enough for pairs to meet privately. Wall space is needed for posting newsprint.

Process

1. The facilitator discusses the goals of the activity and gives a brief overview of the design.
2. Each team member is instructed to select as a partner someone with whom he or she has not talked recently.
3. When pairs are assembled in separate places in the room, the facilitator tells the partners to take turns interviewing each other. The topic for the interview is “What problem situations should we work on in this team-building session?” Each team member will have five minutes to interview his or her partner. Interviewers are not to take notes, but they are to be prepared to report what their partners said.
4. After the interviewing phase has been completed, the team is reassembled in a circle. (The facilitator remains outside the circle.) Each member takes a turn reporting to
the team (not to the facilitator) what his or her partner said. The facilitator lists on newsprint each member’s suggested problem situations (in the member’s own words). Each interviewee then “corrects the record” by adding anything that the interviewer left out or by adjusting any misperceptions. During this phase, the team members may respond only by asking questions for clarification.

5. The lists of problem situations are posted on a wall, and the items are numbered. Duplicates are combined or are given the same number.

6. The facilitator instructs each team member to select, by number, the three problem situations that he or she believes are most important. Then the facilitator tallies on newsprint the number of members who have indicated each of the items.

7. The facilitator posts a new list of the items with the highest frequencies in the tally.

8. Each participant is instructed to rank order these problem situations independently, in terms of which are most important. The rank “1” is to be assigned to the item that the member believes must be discussed if the team-building session is to be successful. The second-most pressing situation is ranked “2,” and so on.

9. The facilitator tallies the ranks assigned to each of the items by asking how many members ranked item A as 1, 2, 3, etc. (If there are more than six or seven items, the tally can be based on a “high, medium, or low” ranking.)

10. The facilitator posts the final agenda on newsprint. He or she leads a discussion of reactions to the agenda-setting process.

**Variations**

- The interview time can be varied to take into account the length of the team-building session. In a brief meeting, the interviewers can ask for the one problem situation that needs to be faced by the team.
- The leader of the team (instead of the facilitator) can function as the recorder.

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Submitted by John E. Jones.
DIVIDING THE LOOT: SYMBOLIC FEEDBACK

Goals
- To provide symbolic feedback to the team members.
- To explore the responsibilities and problems of leadership.

Group Size
All members of an ongoing team.

Time Required
One hour.

Materials
- Money collected from the team members. (Each team member brings a specified amount, preferably in coins.)
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
Chairs placed in a circle.

Process
1. The facilitator instructs an elected leader to collect a specific sum, such as $2.00, from each team member. He or she then explains that the leader will reallocate this money on the basis of criteria to be established during the following step.
2. The facilitator indicates that the team will advise the leader in developing the criteria. The leader may wish to form subgroups to accomplish this. Criteria may include such factors as risk taking, openness, helpfulness, or growth.
3. After suggestions have been made to the leader, he or she decides the actual criteria to be used, according to these ground rules:
   - The money must be redistributed unequally.
   - No one may receive the exact amount that he or she contributed.
   - Two or more criteria must be used.

1 This activity is best used in a design that links it with “Line-Up and Power Inversion,” which can be found in Section 2 of this volume. “Dividing the Loot” should follow the use of “Line-Up and Power Inversion.”
- All the money must be redistributed to individual team members.
- The leader must include himself or herself in the redistribution.

4. The leader leaves the room for twenty minutes to work out the redistribution. While he or she is out of the room, the remaining team members discuss what criteria would be most appropriate. Then each person predicts what he or she will receive and tells the others.

5. The leader returns, explains his or her selection of criteria, distributes the money, and processes the experience with the team. Discussion of behaviors such as counterdependence and conflict avoidance may be appropriate.

**Variations**

- Other symbols such as medals or certificates can be used instead of money.
- A “steering committee” can be used instead of an elected leader. This committee can meet in the center of the room to redistribute the money.
- The criteria can be established and applied by team consensus, with no elected leadership.
TEAM CALENDAR: CELEBRATING SIGNIFICANT EVENTS

Goals
- To offer the team members a nonthreatening method of getting to know one another better.
- To give the team members the opportunity to remember significant work-related events that took place during the past year and to recognize and appreciate one another’s achievements.
- To allow the team members to compare memories of significant work-related events.

Team Size
All members of an ongoing team. If there are more than eight members, the facilitator will need to establish subgroups for processing (see steps 6 and 7).

Time Required
One hour to one hour and fifteen minutes.

Materials
- A pad of 3” x 3” Post-it™ notes for each team member.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting
A room with enough wall space for displaying three sheets of newsprint side by side. The team members should be seated so that they can view the sheets of newsprint without difficulty.

Process
1. The facilitator explains the goals of the activity.
2. The facilitator posts three newsprint sheets side by side and divides each sheet into quadrants with a felt-tipped marker. The facilitator then writes the name of a month in each quadrant, thus creating a calendar (see Figure 1).
3. The team members are instructed to think back on the past year and to reflect privately about significant work-related events that have affected them personally and/or their team. The facilitator explains that “significant work-related events” may include projects, promotions, team or task-force accomplishments, unexpected changes, changing jobs or positions, and so on.

4. While the team members are reflecting, the facilitator distributes pads of Post-it™ notes and pencils. Each member is instructed to select three or four significant events and to write a brief description of each event on a separate Post-it™ note, including the month in which the event occurred. The following examples are given:

- “Finished policy report (with Chris)” (April);
- “Terry retired—worked with us for six years” (November); and
- “Customer signed six-month contract for our services” (December).

(Ten minutes.)

5. The team members are instructed to place their notes on the appropriate months of the posted calendar. The facilitator then groups notes listing similar events together and separates dissimilar events visually, as illustrated in Figure 2.

![Figure 1. Arrangement of Calendar Pages](image)

![Figure 2. Sample Placement of Notes on Team Calendar](image)
6. The facilitator reads each note aloud to the team, comments on any similarities among notes, inquires about emotions attached to each event, and calls the team members’ attention to areas on the calendar in which notes are bunched together or spread apart. The facilitator also mentions any events that are remembered as taking place at different times of the year or that various people remember as happening differently and asks the members to comment on these discrepancies. (Fifteen to twenty-five minutes.)

7. The facilitator leads a discussion of the team’s progress in the past year, asking the members to recognize one another’s accomplishments, to talk about sad or happy times during the year, and to discuss times during which their team functioned above or below normal capacity. The following questions are helpful:

- What is your reaction to sharing this experience as a team? How did you feel while discussing your team calendar?
- How would you describe your team in the last year? What phrase captures the team’s progress?
- What were the highs? What were the lows? How did those highs and lows affect the team?
- As a result of this experience, what have you learned about the team and about one another?
- How can you use what you have learned to enhance relationships and productivity in the team?

**Variations**

- The activity may be used as an icebreaker in a team-building workshop.

- The facilitator may limit the number of items that each member may place on the calendar. Alternatively, the facilitator may choose not to set limits and to have the members mill around the calendar and review the items silently. Afterward, the facilitator leads a processing discussion, asking the team members to find common, significant themes in the posted items.

- The team members may be allowed to submit one or more personal events along with the work-related events.

- If the facilitator is an internal consultant or is acquainted with the team, he or she may add personal items to the calendar and discuss them with the team.

- The facilitator may ask the team members to identify major events that affected the entire organization during the year (such as a company takeover, a hiring freeze, a recession, and so on). The members may be instructed to post such events on the calendar or on a separate newsprint sheet above the calendar. The facilitator then leads a discussion of how people respond to more “global” happenings and crises.
The facilitator may ask the members to imagine their team calendar one year from now. The members may be asked to envision the coming year and to note one or two highlights that they would like to look back on. This activity can help team members to prioritize objectives and goals, to request support from one another, or simply to get a sense of the pace of the year to come.

The activity may be closed with the facilitator’s asking each team member to write a description of one planned vacation—including month and destination—on a Post-it™ note and to post the vacation notes on the calendar. A calendar full of vacations can help the members to view the coming year as a time of fun and excitement.

Submitted by Marc B. Sokol and Douglas A. Cohen.
NOMINATIONS: ANALYZING TRUST WITHIN A TEAM

Goals
- To provide the team members with feedback about how they are perceived by one another.
- To acquaint the team members with the behaviors and characteristics that tend to build trust within a team.
- To assist the team members in analyzing the level of trust that exists in their team and in devising ways to increase trust.

Group Size
All members of an ongoing team.

Time Required
One hour to one and one-half hours.

Materials
- A copy of the Nominations Analysis Form for each team member.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
A room in which the team members can be free from outside interruptions.

Process
1. The facilitator introduces the goals of the activity, briefly explains the process, and distributes copies of the Nominations Analysis Form and pencils. The team members are instructed to complete the form individually. (Ten minutes.)
2. After everyone has completed the task, the facilitator goes through the team-member behaviors and characteristics one at a time, asking the members to share their nominations and to describe the incidents and actions that led to those nominations. The facilitator records nominations for each behavior or characteristic on newsprint. (Approximately twenty minutes.)
3. The facilitator assists the team members in achieving consensus about the one person who is most representative of each behavior or characteristic. The facilitator records the consensus decisions on newsprint, and the team members record these decisions on their own copies of the form.

4. The team members discuss their reactions to and feelings about the feedback they received during steps 2 and 3. (Five to ten minutes.)

5. The facilitator leads a concluding discussion by asking these questions:
   - What have you learned about the elements that contribute to the level of trust in a team?
   - What have you learned about how the level of trust in a team affects team functioning?
   - How would you describe the level of trust in this team?
   - What can you do to help increase the level of trust in this team?
   - After completing this activity, which of the team-member behaviors and characteristics would you like to experiment with? How could your fellow team members help you as you experiment?

**Variations**

- The team members may be asked to predict what nominations they will receive.
- The team may devise its own nomination instrument.
- The team members may be asked to complete the Nominations Analysis Form periodically. After each administration of the instrument, the team members compare the results with those of the previous administration. If this option is chosen, a volunteer team member should offer to keep a copy of the form, with the consensus blanks filled in, for comparison purposes at a later date.
- After step 5 the team members may choose partners for the purpose of contracting to develop new behaviors or characteristics.
NOMINATIONS ANALYSIS FORM

Introduction and Instructions: Individual team members contribute most effectively to their team when they feel free to be themselves, and they feel that freedom only when a high level of trust exists in the team. A high level of trust leads to a team climate that is largely free of defensiveness, manipulative strategies, and communication difficulties; members willingly share information about themselves and their work.

The team-member behaviors and characteristics that tend to build trust within a team are awareness, self-acceptance, acceptance of others, supportiveness, risk taking, a focus on problems, and the ability to level with others. Each of these behaviors and characteristics is defined below. Read each definition; then in the blank labeled “Your nomination” write the name of the person in your team who, in your opinion, most closely resembles the definition. Later you and your fellow team members will reach a consensus about which member is most representative of the definition, and you will write that member’s name in the blank labeled “Consensus.”

1. **Awareness.** A person is aware when his outward behavior reflects his inner feelings and thoughts; when he explicitly recognizes how his feelings are influencing his behavior; when he recognizes and responds to the feelings he experiences. Awareness may be indicated by a statement such as “I feel somewhat at a loss; we don’t have a topic” (instead of “We’re just floundering without something we can get our teeth into”) or “I’m not sure I want to say how I feel about you” (instead of “I don’t think we ought to get personal”).

Your nomination ______________________ Consensus __________________

2. **Self-acceptance.** A person is self-accepting when she is able to accept her own feelings without denying them, giving rationalizations for them, or apologizing for them. Self-acceptance may be evidenced by a statement such as “I’m bored with what you’re saying” (instead of “This is a boring topic”) or “I’m angry at myself for being ineffective” (instead of “This team isn’t getting anywhere”).

Your nomination ______________________ Consensus __________________

3. **Acceptance of others.** A person is accepting of others when he accepts the feelings and thoughts of others without trying to change them; when he lets others be themselves even though they are different from him. Acceptance of others may be shown by listening in order to understand, by listening without trying to refute, by not arguing, by asking questions in order to understand, or by not judging another.

Your nomination ______________________ Consensus __________________
4. **Supportiveness.** A person is supportive when she seeks ways to help others reach goals that are important to them; when she tries to understand what others want to do, although she may not agree with their conclusions; or when she encourages others to try behavior that is new to them. Supportiveness may be seen in comments such as “Could you tell me how I might help you reach your objective?” or “I’m not sure I agree with what you’re proposing, but I support your effort to get something going” or “Let me see if I understand what you want us to do....”

Your nomination ______________________ Consensus __________________

5. **Risk taking.** A person takes risks when he goes “beyond the known” by experimenting with new behavior; when he wants to accomplish something or to support someone else more than he wants to play it safe or to “keep his cool”; when he is willing to risk being angry, anxious, caring, driving, or retreating, even though these behaviors may make him appear foolish or inept or unintelligent or may arouse his anxiety. Risk taking may be shown by requesting feedback about one’s behavior, by supporting someone when it is not clear what the consequences will be, or by giving feedback to others about their behavior.

Your nomination ______________________ Consensus __________________

6. **Focus on problems.** A person is problem focused when she concentrates on the problems facing the team rather than on control or method, when she tries to learn by solving problems herself rather than by using someone else’s solutions. A focus on problems may be seen in one’s efforts to find out what is blocking a team, to increase personal effectiveness, and to probe beyond the symptoms. Underlying a focus on problems is the assumption that more work is accomplished when individuals and teams learn how to solve problems than when they maintain the same pattern of method, control, leadership, or feedback.

Your nomination ______________________ Consensus __________________

7. **Ability to level with others.** A person levels with others when he is open about his personal feelings and thoughts, when his outward behavior reflects his inner experience.

Your nomination ______________________ Consensus __________________
CREATING IDENTITY: 
DEVELOPING COHESIVENESS IN A TEAM

Goals

- To develop cohesiveness in the team.
- To explore the dynamics of group-task accomplishment.

Group Size

All members of an ongoing team. This activity is best used with a newly formed team.

Time Required

Approximately one and one-half hours.

Materials

- A copy of the Creating Identity Poster-Format Sheet for each team member.
- A copy of the Creating Identity Processing Guide for each team member.
- A pencil for each team member.
- A newsprint flip chart and several felt-tipped markers (in various colors).
- Masking tape for posting newsprint.

Physical Setting

A room with a table and chairs for the team members and wall space for displaying the team’s poster.

Process

1. The facilitator briefly explains the goals and process and states that the activity is intended to promote the members’ sense of identification with their team.

2. The facilitator gives the team members copies of the Creating Identity Poster-Format Sheet, a newsprint flip chart, and several felt-tipped markers. The members are instructed to create a name, a logo, and a motto for their team and to record these elements as well as their names on a newsprint poster in the format indicated on the poster-format sheet. The members are given thirty minutes to plan and execute this task.
3. At the end of the task phase, the facilitator gives each team member a copy of the Creating Identity Processing Guide and a pencil and reads aloud the instructions printed on the form. The facilitator asks each team member to jot down answers to the questions on the processing guide. (Ten to fifteen minutes.)

4. The facilitator invites the team members to share their answers to the questions on the processing guide and leads a discussion on the members’ interaction as they completed the task. (Twenty minutes.)

5. The facilitator instructs the team to display its poster on the wall and then elicits the team members’ reactions to the poster. (Ten minutes.)

6. The facilitator elicits comments regarding what the team members have learned about cohesiveness and about group-task functioning.
CREATING IDENTITY POSTER-FORMAT SHEET

TEAM NAME
(acronym or other memorable designation)

TEAM LOGO
(diagram, picture, words, colors)

TEAM MOTTO
(a saying or slogan related to the team’s purpose, values, composition, or preferred way of working)

TEAM MEMBERS
(may include titles)
CREATING IDENTITY PROCESSING GUIDE

Now that you have completed the development of your team’s identity, take a few minutes to look back at the interaction that occurred. First write answers to the questions on this form; then, after you have completed your independent work, you will share your responses with your fellow team members.

1. **Organization**

   How did your team organize itself to accomplish the task?

   How did you feel during this getting-started phase?

2. **Involvement**

   How involved were all of the members during the problem solving?

   How did you feel about your own involvement?
3. **Creativity**

What creative processes were used or occurred spontaneously?

What was happening with you during the creative activity?

4. **Conflict**

If there were disagreements, how were these handled by the team?

How did you feel when there was team tension?

5. **Closure**

How did the team decide that its task was done?

How did you feel at the end of the team’s production phase?
DEPENDENCY-INTIMACY: A FEEDBACK EXPERIENCE

Goals
- To provide the team members with feedback derived from an instrument.
- To offer the team members an opportunity to study how the personal dimensions of dependency and intimacy affect group development.

Group Size
All members of an ongoing team.

Time Required
Approximately one and one-half hours.

Materials
- A copy of the Dependency-Intimacy Rating Form for each team member.
- A copy of the Dependency-Intimacy Tally Form for each team member.
- A pencil for each team member.

Physical Setting
Writing surfaces and comfortable chairs should be provided for the team members.

Process
1. The facilitator gives a lecturette on the relationship between group members’ personalities and group development, stressing the centrality of the dimensions of dependency (orientations toward authority, power, and structure) and intimacy (orientations toward closeness and personal factors). (Ten minutes.)
2. The team members are given copies of the Dependency-Intimacy Rating Form and pencils and are instructed to complete their forms without recording their names. (Five minutes.)
3. The facilitator collects the completed rating forms and distributes copies of the tally form.
4. The facilitator reads the ratings aloud, and each team member tallies the ratings assigned to him or her by the other members. (Five minutes.)
5. The facilitator elicits the team members’ reactions to their ratings—how they feel about the ratings they received and how accurate they think these ratings are. The members are encouraged to elicit feedback from one another. (Thirty minutes.)

6. The facilitator leads a discussion of the team’s development in terms of member behaviors that facilitate or impede the attainment of team goals. (Thirty minutes.)

**Variations**

- The team members may rank order (rather than rate) themselves and one another on the two traits.
- The facilitator may do the tallying quickly while the team takes a break.
- The tallies may be done on newsprint so that all data can be seen at one time.
- Other traits may be used, such as inclusion, control, and affection.

Submitted by John E. Jones.
## DEPENDENCY-INTIMACY RATING FORM

**Instructions:** The following scales are provided so that you can rate yourself and all of your fellow team members on two traits, dependency and intimacy. Write the names of the team members in the blanks following the two continua. Then read the descriptions of the two personality traits; assign a numerical rating to each team member, including yourself, for each of the two traits.

### DEPENDENCY

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<td>Relies on structure, leader, team, and agenda</td>
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<td>Independent</td>
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<td>Feels comfortable without structure</td>
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<td>Counterdependent</td>
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<td>Rebels against almost all forms of structure</td>
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### INTIMACY

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<td>Overpersonal</td>
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<td>Needs to establish close personal relations with everyone and needs to keep the team on a personal level</td>
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<tr>
<td>Personal</td>
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<td>Encourages and generates personal relations when they seem appropriate</td>
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<tr>
<td>Counterpersonal</td>
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<tr>
<td>Needs to keep relations with others formal and impersonal and needs to keep team interaction formal and impersonal</td>
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<table>
<thead>
<tr>
<th>Dependency</th>
<th>Intimacy</th>
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Dependency and intimacy are not seen as linear dimensions; instead, the extremes of dependency and counterdependency are dynamically close, as are those of overpersonality and counterpersonality. The individual who experiences conflict in dealing with either dependency or intimacy may display behaviors on both ends of the continuum; he or she may be alternately dependent and counterdependent in a stressful situation, even in the same team meeting. The circles below demonstrate the relationship between the extremes of these two dimensions. Tally the ratings you receive from your fellow team members by marking X’s on the circles.
LEVELING:
GIVING AND RECEIVING ADVERSE FEEDBACK

Goals
- To allow the members of a team to compare their perceptions of how the team sees them with actual feedback obtained from the team.
- To legitimize giving negative feedback within the team.
- To develop the team members’ skills in giving and receiving negative feedback.

Group Size
All members of an ongoing team.

Time Required
Varies according to the number of team members. Steps 1 through 5 and step 7 require approximately forty minutes altogether; step 6 requires ten minutes for each team member. For example, a team of five members would require one and one-half hours for the entire activity.

Materials
- For each team member, a number of 3” x 5” cards equal to the number of team members minus one. (For example, if the team has seven members, each receives six 3” x 5” cards.)
- A pencil for each team member.

Physical Setting
A comfortable chair for each team member. For steps 1 through 3, the chairs are arranged in a circle. For steps 4 through 6, the chairs are arranged in a semicircle, with one chair “on stage” facing the semicircle (see Figure 1). For the final step, the circle is reformed.

![Figure 1. Setting for Second Phase](image)
Process

1. The facilitator discusses the goals of the activity.

2. The 3” x 5” cards and pencils are distributed, and the team members are instructed to write the first names of the other members on the cards (one name per card).

3. Each team member is instructed to write a short piece of adverse feedback about every other team member; each person’s feedback is to be written on the card bearing that person’s name. The facilitator gives the following guidelines for this task:
   - The feedback for each individual should consist of a list of three to five adjectives (rather than a sentence) describing that individual.
   - Each team member must write a list of adjectives for every other team member. (Fifteen minutes.)

4. The chairs are rearranged as illustrated in Figure 1.

5. The facilitator calls for a volunteer to be the first to receive feedback. If there are no volunteers, the facilitator designates one member.

6. The following procedure is repeated until all members have received feedback:
   - The recipient of the feedback sits in the “on-stage” chair.
   - The recipient anticipates the content of the feedback and briefly explains his or her expectations to the team.
   - The team members who are seated in the semicircle take turns reading their feedback lists to the recipient.
   - The recipient discusses the degree of agreement between anticipated perception and actual perception.
   - The recipient discusses his or her feelings about the adverse feedback. (The team members in the semicircle are asked not to react, either verbally or nonverbally, to what the recipient says. Their reactions could result in an overload of feedback.)
   - All team members except the last choose their successors as feedback recipients. (Ten minutes per team member.)

7. After all team members have completed the feedback process, the facilitator asks them to rearrange their chairs into a circle and then leads a discussion about the activity, focusing on the stated goals.

Variations

- The content of the feedback may be changed to include positive data.
- The feedback cards may be distributed to the recipients to keep.
- Each feedback recipient may be asked to leave the room while the remaining team members attempt to reach consensus about the feedback to be given. (Using this variation increases the probability that the feedback will be honest and straightforward.)

- The feedback may be given anonymously rather than face to face.

Submitted by J. William Pfeiffer.
THE ADVERTISING FIRM: A TEAM FEEDBACK ACTIVITY

Goals
- To develop the team members’ awareness of how they work together while completing a task.
- To assist the members in generating ways to improve their effectiveness as a team.
- To monitor the effect of periodic feedback on an ongoing team as it completes a task.
- To enhance the members’ understanding of the role of feedback in enhancing a team’s effectiveness.

Group Size
All members of an ongoing team.

Time Required
Approximately one and one-half hours.

Materials
- Blank paper and a pencil for each team member.
- Two newsprint flip charts and several felt-tipped markers (one flip chart and several markers for the team members’ use; one flip chart and one marker for the facilitator’s use).

Physical Setting
A room in which the team members can interact freely. A table and chairs should be provided.

Process
1. The facilitator explains that the members will be working as a team to complete a task. The task is described as follows:
   “You and your fellow members are a project team for an advertising firm. A candy company has just created a new candy bar made of chocolate, caramel, and pecans and has employed your advertising firm to name the bar and to design a one-minute radio commercial for it. Consequently, your project team is to spend the next five
minutes naming the bar. Then you will spend thirty minutes designing the radio commercial, after which you will present the commercial.”

After clarifying the instructions as necessary, the facilitator distributes blank paper and pencils, gives the team a flip chart and several felt-tipped markers, and asks the members to begin naming the candy bar. The team members are told not to proceed to creating the radio commercial until instructed to do so.

2. After five minutes the team members are told to stop working on the name. The facilitator asks the following questions:
   - What name did the team come up with?
   - How was the final choice made?
   - How pleased are you with the name?
   - How pleased are you with the way in which you and your fellow team members worked together to complete this task?
   - What could you do differently to improve your team’s work while creating the radio commercial?
   (Ten minutes.)

3. The team members are instructed to begin work on the radio commercial advertising the new candy bar and to be prepared to present this commercial at the end of the thirty-minute work period.

4. After fifteen minutes the facilitator tells the team members to stop their work temporarily. The following questions are asked:
   - As you work on the radio commercial, to what extent are you using your greatest assets as a member of this team? How do you feel about that?
   - How satisfied are you with the way in which ideas are being shared? How satisfied are you with the way in which the task is being completed?
   - In what ways are you encouraging one another to contribute? In what ways are you discouraging one another?
   - To what extent is the team making use of its members’ resources?
   - When you compare this work period and the previous one during which you named the candy bar, what similarities do you find? What differences do you find?
   - In view of your answers to these questions, what will you do differently in the next fifteen minutes as you complete the radio commercial?
   (Ten minutes.)

5. The facilitator asks the team members to continue their work on the radio commercial.
6. After fifteen minutes the team members are instructed to stop working and to present their commercial.

7. The facilitator asks the following questions:
   - How pleased are you with the quality of the commercial? How pleased are you with the quality of the presentation?
   - How did you decide who would present the commercial? How pleased are you with the process of that decision?
   - On a scale of 1 to 5, with 1 as low and 5 as high, how would you rate your team’s work with respect to the following dimensions of effective teamwork?
     Participation
     Collaboration
     Flexibility
     Sensitivity to one another
     Risk taking
     Commitment to the task
     Facilitation of the group process
     Openness with one another
   As the team members respond with their ratings, the facilitator records both the dimensions and the ratings on newsprint.
   - In light of these ratings, what can you say about your team’s process?
   - What have you learned about the role of feedback in improving a team’s effectiveness?
   - What will you personally do in the future to foster your team’s effectiveness?
   - What would you like to say to your fellow team members at this moment?

Variations
   - The facilitator may omit the processing after the first fifteen minutes of work on the commercial and allow the team to proceed solely on the basis of the feedback from step 2.
   - The evaluation of the commercial presentation may be omitted.
   - The facilitator may extend the activity by giving the team members another task to which to apply what they have learned or by having the team present the commercial a second time after feedback.
- If the team is large enough, some members may be asked to act as observers, encouraging the others to make the changes in process that they discussed during steps 2 and 4.

Submitted by Jeanne Lindholm.
TWENTY-FIVE QUESTIONS:
ASSESSING TEAM DEVELOPMENT

Goals
- To enhance the team members’ relationships with one another.
- To stimulate a team discussion about work-related topics.
- To clarify assumptions that the team members make about one another.

Group Size
All members of an ongoing team.

Time Required
Approximately one and one-half hours.

Materials
A copy of the Twenty-Five Questions Form for each team member.

Physical Setting
A room with chairs arranged in a circle.

Process
1. The facilitator introduces the goals of the activity and briefly discusses the importance of being open in relationships with coworkers and of obtaining feedback on one’s work style. (Five minutes.)
2. The facilitator distributes copies of the Twenty-Five Questions Form, explains the ground rules, and elicits and answers questions to ensure that each team member understands the procedure. (Five minutes.)
3. The facilitator asks the team members to volunteer to initiate questions. (The team members may need to be encouraged to confront one another. For example, each member may be asked to read the list of questions silently, to select one question, and to look around the circle and choose one person to become the focus of that question. Then the facilitator may solicit a volunteer to ask a question; after each question has been asked and answered, the facilitator may need to encourage others to volunteer. Also, some direction from the facilitator may be required for questioners to answer their own queries.)
4. The facilitator interrupts the question-and-answer procedure after about thirty minutes to assist the team members in discussing how the activity is progressing. Questions such as the following may be useful:

- Who questions whom?
- How open are we being?
- What risks are present in this activity?
- To what degree is trust being generated?
- What are we learning about ourselves?
- What are we learning about one another?
- Whom might you want to do this with privately?
- How might we improve the activity in the next round?

(Fifteen minutes.)

5. The procedure is resumed, and the team members are urged to note any change that can be attributed to the processing intervention of the previous step.

6. After about twenty minutes, the procedure is stopped. The facilitator encourages the team members to respond to the question “If we were to quit right now and never do this again, what question would you regret not having asked someone?”

7. The entire activity is critiqued by the team members, and its implications for the team’s continued development are discussed. The team members make plans to use the same questions in a follow-up session to be held in a few months.

**Variations**

- The team members may be paired in the initial phase to work through as many questions as they can during the time allotted. Then in the second round the risk taking may be increased by forming pairs on the basis of a variety of criteria (for example, leader and follower, people who know each other least well, and people who think that they are different from each other).
- The question form may be supplemented with items suggested by the team members.
- An entirely different question form may be generated from items suggested by the team members. For example, the team members may have a discussion of what they would need to talk about in order to increase openness and trust in their interpersonal relations. The resulting items may be duplicated later for use in a subsequent session.
- Each team member may be asked to write a name or names at the end of each of the twenty-five questions when the list is read for the first time. This approach may heighten the volunteering.
In an extended session (two to three hours), the process may be interrupted several times so that the team members can rate themselves and the team on honesty and risk taking (see the continua that follow). Subsequently, the two scales are displayed on newsprint, and the members record their ratings independently on blank paper.

<table>
<thead>
<tr>
<th>Dishonest, evasive</th>
<th>Me</th>
<th>Completely honest, open</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

**The Team**

<table>
<thead>
<tr>
<th>Playing it safe</th>
<th>Me</th>
<th>Taking many risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

**The Team**

Submitted by John E. Jones.
TWENTY-FIVE QUESTIONS FORM

Ground Rules: The list of questions below is designed to stimulate team discussion of work-related topics. The following ground rules should govern this discussion:

1. Take turns asking questions, either to specific individuals or to the team as a whole.
2. You must be willing to answer any question that you ask.
3. Any member may decline to answer any question that someone else asks.
4. Work with the person who is answering to make certain that effective two-way understanding takes place.
5. All answers remain confidential within the team.

Questions: (may be asked in any order)

1. How do you feel about yourself in your present job?
2. What do you see as the next step in your career development?
3. What personal characteristics do you have that get in the way of your work?
4. What are you doing best right now?
5. What are you trying to accomplish in your work?
6. Where do you see yourself ten years from now?
7. How are you perceiving me?
8. What would you predict to be my assessment of you?
9. What was your first impression of me?
10. How many different kinds of responsibilities do you have?
11. How do you typically behave when a deadline is approaching?
12. What kind of relationship do you want with me?
13. What things do you do best?
14. What factors in your job situation impede your goal accomplishment?
15. Which team member are you having the most difficulty with right now? (What is that person doing? What is your reaction?)
16. To whom are you closest in your work situation?
17. Where would you locate yourself on a ten-point scale of commitment to the goals of this team (1=low, 10=high)?
18. What part are you playing in this team?
19. How do you want to receive feedback?
20. What do you think I am up to?
21. What puzzles you about me?
22. How are you feeling right now?
23. What issue do you think we must face together?
24. What do you see going on in the team right now?
25. What personal-growth efforts are you making?
TEAM SOCIOGRAM:
COMMUNICATION WITHIN A TEAM

Goals
- To identify existing patterns of interaction and influence in a team.
- To increase the team members’ awareness of the effects of group dynamics on communication patterns within the team.

Group Size
All members of an ongoing team.

Time Required
One hour and thirty to forty minutes.

Materials
- A blank 3” x 5” index card for each team member.
- One Tinkertoy® spool for each team member.
- A set of Tinkertoy® rods (two 1" orange, one 2" yellow, one 3" blue, one 5" red, and one 7" green) for each team member.
- A prepared newsprint “target” with circles of 3", 6", and 9" radii (see Figure 1).

![Figure 1. Prepared Newsprint “Target”](image)

- A marker (any object) for the center of the target.
- Newsprint and a felt-tipped marker.

Physical Setting
A room with a table and chairs for the team members.
Process

1. The facilitator introduces the activity, instructs the team members to be seated around the table, and gives each member a blank 3" x 5" index card and a Tinkertoy® spool into which two short (1" orange) rods are inserted—one vertically in the center and one horizontally in the side. (Five minutes.)

2. The facilitator asks each team member to fold the index card in half, write his or her name on the folded card, and insert it into the slits in the upper ends of the vertical rods (see Figure 2). The facilitator then places a prepared newsprint “target” in the center of the table and puts a marker in the center of the target. (Five minutes.)

3. The facilitator announces that the team members will create a symbolic “picture” of their team. The facilitator explains that the marker designates the center or nucleus of the team, symbolizing its goals and purposes. Each member is told to place his or her spool along or between the circles (that is, nearer to or farther from the center) to signify how closely the member’s own goals and interests match the team’s goals and interests. The facilitator stipulates that this is to be done nonverbally. (Five minutes.)

4. The facilitator instructs the team members to discuss the spool placements, without making any changes, for a few minutes. (Five minutes.)

5. The team members are allowed a few minutes to change their own spool markers if desired, but are cautioned not to change other people’s spool markers. (Ten minutes.)

6. The facilitator provides each team member with four additional Tinkertoy® rods (one yellow, one blue, one red, and one green) and informs the members that the lengths of these rods correspond to the degrees of influence or control that a person has in the team: the longer the rod, the greater the influence. The facilitator then states that the shortest (orange) vertical rod presently in the center of each team member’s spool represents zero influence. Each team member is told to replace this rod—without changing the position of the spool—with one of the new rods to indicate the
degree of influence or control that he or she has in the team at the present time. The facilitator stipulates that this is to be done nonverbally.

7. The team members are directed to discuss their symbolic decisions without making any changes. After all members have shared their thinking, individuals are permitted to make changes in their own rods or to request another member to make changes. The person asked may comply with or refuse the request. (Ten minutes.)

8. The facilitator explains that the short (orange) horizontal rods represent the direction in which the team members are facing. The members are instructed to move their markers around the target circles closer to those members for whom they feel the greatest closeness (or with whom they have the best communication) and farther away from those for whom they feel the most interpersonal distance (or with whom they have the poorest communication). The team members also are instructed to face their markers toward or away from other members to indicate positive or negative attraction. The facilitator specifies that this is to be done nonverbally.

9. The facilitator asks the team members to spend five minutes discussing their placements without making any changes.

10. At the end of the five-minute period, the team members are told that they may make changes in their relative positions or request other members to make changes. Any person asked to make a change may comply with or refuse the request. (Ten minutes.)

11. The facilitator leads a discussion of the activity, focusing on three major areas:
   - The members’ reactions to the perceptions of others (fifteen minutes);
   - The patterns of interaction and sources of influence within the team and their implications for the present state of the team’s development (fifteen minutes); and
   - Ways in which the team members might apply what they have learned to improve patterns of interaction within the team (fifteen minutes).

Variations
   - After step 10 the facilitator may provide additional spools representing absent team members and/or other significant individuals. The team members are then encouraged to place these markers in accordance with either how they believe these members would have placed the markers or how they perceive these other individuals in terms of interaction and influence.
   - The team may repeat this activity at intervals in its development and keep a graphic record for later comparisons.

Submitted by Thomas J. Mallinson, Alan Tolliday, and Ron Sept.
I HEAR THAT YOU . . . :
GIVING AND RECEIVING FEEDBACK

Goals

- To establish a climate conducive to giving and receiving feedback in the team.
- To offer the team members an opportunity to practice active listening and feedback skills.
- To help make team behavior more understandable to the members by linking behavior to perceptions.
- To improve team relations and climate.

Group Size

All members of an ongoing team.

Time Required

One and one-half to two hours.

Materials

- Newsprint listing the following guidelines for giving and receiving feedback (prepared by the facilitator prior to conducting the activity). The first five are listed on one sheet, and the sixth is listed on a second sheet.
  - It is a good idea to begin with positive feedback and work toward more negative issues.
  - The job of the listener is to practice active listening and ask for clarification only when necessary.
  - The informers may either pass on comments they have heard from other sources (reported information) or give personal reactions to the listeners.
  - Personal feedback to the listener must be “owned,” that is, identified as such.
  - Other sources are not to be identified.
  - All sources are to remain confidential. During Phase II the listener may say “I have heard that I...” but may not say “Jim told me that Fred said that I . . . .”
- Blank paper and a pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- Masking tape for posting newsprint.

**Physical Setting**

A room with enough space for the team members to work in pairs without disturbing one another.

**Process**

1. The facilitator introduces the goals of the activity and then states that often it is difficult in a team situation to spontaneously give or receive praise, constructive criticism, or negative feedback because people do not want to interfere with the team’s process, to alienate others, or to be seen as troublemakers, and also because they do not know how others will respond. The facilitator goes on to say that the purpose of this activity is to provide the team members with an opportunity to pair off and exchange information about each other and to respond to the information they receive.

2. The facilitator introduces Phase I of the activity—data gathering—and explains that each team member will pair off in rounds with every other person. During each round the partners will have three minutes each to exchange, in turn, “feedback” that they have for each other. The first sheet of prepared newsprint (listing the first five guidelines) is posted, and the facilitator reviews these guidelines with the team members. (Five minutes.)

3. The team members receive blank paper, pencils, and clipboards or other portable writing surfaces and are instructed to form pairs. The pairs are instructed to position themselves around the room so that they can converse without being overheard by one another. The partners are asked to decide which person will speak first and then to begin Phase I of the activity in accordance with the posted guidelines.

4. After three minutes the facilitator instructs the partners to reverse roles.

5. After three more minutes, the facilitator calls time. One minute is allowed for the team members to make notes on the feedback they received. Then they are asked to select new partners.

6. The feedback process continues, with partners reversing roles, until each member of the team has exchanged feedback with every other member.

7. The team members are instructed to privately review the information they have received. (Five minutes.)

8. The facilitator introduces Phase II of the activity—responding—and says that each person will have three minutes to make comments to the entire team in response to the cumulative data collected about himself or herself. It is stressed that this is the time to clarify issues, kill rumors, and reinforce accurate data. The facilitator posts the second sheet of prepared newsprint (listing the last guideline) and emphasizes
that the sources of information must remain confidential. Then the facilitator asks for a volunteer to begin Phase II.

9. The facilitator leads a discussion about the team members’ new perceptions of both the uses of feedback to improve the team’s functioning and ways in which to best give and receive feedback.

**Variations**

- The team members may be instructed to predict the feedback they expect to hear prior to the information exchange. Then they review their expectations as part of step 7.
- The team members may rank order one another in terms of those with whom they are most interested in giving or receiving feedback; the team members then circulate at random to complete the task.

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Based on material by Drew P. Danko and Rich Cherry.
CUPS: A POWER EXPERIENCE

Goals

- To increase the team members’ awareness of the meaning of power, particularly as it is used within the team and the organization.
- To offer the team members an opportunity to experience giving, receiving, and not receiving power.

Group Size
All members of an ongoing team.

Time Required
One and one-half to two hours.

Materials

- Two paper or styrofoam cups for each team member.
- Several slips of paper and a pencil for each team member.
- Several felt-tipped markers in different colors.

Physical Setting
The team members should be seated in a circle.

Process

1. The facilitator briefly introduces the activity and then gives each team member two cups. The felt-tipped markers are passed around, and the team members are instructed to write their names on their cups and to place the cups on the floor in front of them.

2. The facilitator leads a brief guided-imagery experience. In this experience each member imagines a situation in which he or she would be very powerful in the team. Then the team members are instructed to imagine letting their power flow from themselves into their cups. (Five minutes.)

3. The facilitator distributes slips of paper and pencils and asks each team member to define his or her concept of power, to write these thoughts on two slips of paper, and to place one slip in each of the two cups. (Ten minutes.)
4. The facilitator instructs each member to select two team members to whom he or she would give the power imagined during the guided-imagery step. Each team member is asked to remove the slips of paper from the cups, to write one of the names on each slip, and to return the slips to the cups.

5. The team members are told that they will be giving away their cups. Before doing so, each member privately predicts how many cups he or she will receive. Then the facilitator announces that each team member is to state the basis for his or her decision to the people who receive his or her cups. Subsequently, one at a time, the team members give away their cups to the people they have chosen. (Five to ten minutes, depending on the number of team members.)

6. The facilitator instructs each team member to write his or her personal reactions on a new slip of paper. Then each member is asked to select a partner and to share these reactions. (Ten minutes.)

7. The total team is reconvened. The facilitator assists the team members in processing their reactions to receiving or not receiving cups and then leads a discussion on the meaning of power, concentrating on its use within the team and the organization. (Fifteen minutes.)

8. The facilitator announces that each team member who received one or more cups will have one minute to use the newly acquired power with the people who gave him or her the cups. The recipients of power cups are given a few moments to think about how they will use their power, and the people who received no cups are asked to predict how those to whom they gave power will use it.

9. While the total team observes, each recipient of power carries out his or her plan with the person(s) who gave the power. After each power enactment, the team offers feedback. (Ten to twenty minutes, depending on the number of team members.)

10. The facilitator leads a discussion of the entire activity, focusing on its goals.

**Variations**

- The activity may be concluded after step 7.
- Traits other than power (for example, trust or dependency) may be used.
- The team may agree on a definition of power before the members decide to whom they will give their cups.
- Steps 8 and 9 may be replaced with a process of redistributing the cups to those who received few or none. These people then plan how they will use their power, either collectively or separately.

Submitted by Anthony J. Reilly.
YEARBOOK: POSITIVE FEEDBACK

Goals
- To allow the team members to give and receive positive feedback about their perceived roles in the team.
- To enhance the members’ appreciation of themselves and one another.
- To help the members to determine ways in which team functioning might be improved in the future.

Group Size
All members of an ongoing team.

Time Required
One hour and forty minutes to two hours.

Materials
- One copy of a sheet of superlatives for each team member. Prior to conducting the activity, the facilitator prepares this sheet by referring to the following list; selecting as many superlatives as there are team members; and reproducing these superlatives on a sheet of paper, leaving a blank to the left of each so that a team member’s name can be written in that space. (If the team consists of more than fourteen members, the facilitator should devise additional superlatives.)

| __________________________ | Most friendly |
| __________________________ | Best worker |
| __________________________ | Most dependable |
| __________________________ | Most talented |
| __________________________ | Most team spirited |
| __________________________ | Best sport |
| __________________________ | Most deserving |
| __________________________ | Most polite |
| __________________________ | Most creative |
Most sympathetic
Most cooperative
Most flexible
Most supportive
Best negotiator

- A pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

**Physical Setting**

Any room in which the team regularly meets. Chairs should be provided.

**Process**

1. The facilitator explains the goals of the activity and distributes copies of the sheet of superlatives and pencils.

2. The team members are asked to visualize a school yearbook that would portray them. Each member is instructed to work independently to fill in each blank on the sheet with the name of the one team member who best represents the superlative in question. The facilitator stipulates that each team member’s name is to be written only once and that each member should include himself or herself when considering whose name to write in each blank. While people are working, the facilitator reproduces the sheet of superlatives on newsprint and posts the newsprint. (Ten minutes.)

3. After all team members have completed the task, they take turns announcing their choices for the first superlative and their rationales for these choices. As the names are announced, the facilitator writes them on newsprint. The participants then discuss their choices until a consensus is reached regarding which team member most represents the superlative in question. The final choice is recorded on the original newsprint list in the blank to the left of that item. This procedure is followed until a consensus has been reached regarding each superlative. (Forty-five minutes.)

4. The facilitator asks the members to consider how the feedback given and received during the previous step has affected their perceptions of themselves and one another in terms of their roles in the team. The following questions may be useful during the ensuing discussion.
   - At this moment how do you feel about being a member of this team?
How do you feel about being assigned your particular superlative? How do you feel about any other superlatives for which you were nominated? How does your assigned superlative compare with the one you chose for yourself?

What positive contributions do you make to the team in your role as the superlative that you were assigned? What problems might your role cause in the team?

What have you learned about the way in which you are perceived by other team members?

Which other superlative would you like to have been assigned? What role would you like to develop in this team?

Which team members were easy to assign to superlatives and why?

Which were difficult to assign and why?

What superlatives were missing to describe the members of your team?

What have you learned about your fellow team members?

How might you use what you have learned to help your team function better in the future?

(Thirty minutes.)

5. The facilitator assists the members in turning the responses to the last question in step 4 into action steps that they can take to improve the team’s functioning. These steps are recorded on newsprint and kept by the team so that the members can refer to them from time to time.

Variations

Before beginning the activity, the facilitator may deliver a lecturette on giving and receiving feedback.

After step 4 the facilitator may lead a discussion on the evidence of risk taking during the activity and its effect on the team.

After step 5 the facilitator may link what the members have learned with a lecturette on team-member roles.

After step 5 the facilitator may conduct an activity that allows the members to experiment with different roles.

Submitted by Bunty Ketcham and Alan Gilburg.
**SHARING AND SUPPORTING GOALS: BUILDING OPENNESS AND COMMITMENT**

**Goals**
- To enhance the team-building process through self-disclosure, feedback, and interpersonal commitment.
- To offer the team members an opportunity to give and receive feedback about work-related, personal-growth goals.
- To develop the team members’ commitment to support one another’s growth goals.

**Group Size**
All members of an ongoing team.

**Time Required**
One hour and forty-five minutes to four hours and fifteen minutes. (The time required varies according to the size of the team. A team of three members can complete the activity in one hour and forty-five minutes, but a team of ten requires approximately four hours and fifteen minutes. See steps 4 and 6 for times required per team member.)

**Materials**
- Blank paper and a pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- A newsprint flip chart and a felt-tipped marker.

**Physical Setting**
A room with chairs arranged in a circle so that each team member can see all of the others.

**Process**
1. The facilitator briefly presents the goals of the activity, stating that a positive team climate includes the norm that each team member is able to disclose work-related, personal-growth goals and then receive feedback about and support for these goals.
2. Each team member is given blank paper, a pencil, and a clipboard or other portable writing surface. The facilitator writes the following words on newsprint and instructs each team member to reproduce and complete the sentence on paper:

   At work, I need to improve my ability to....

Sample sentence completions such as the following are given: “...confront other team members regarding difficult issues,” “...meet deadlines,” and “...be friendly and cheerful with customers and clients.” The facilitator mentions that if several goals seem appropriate, each team member should choose the one that he or she feels is most significant and complete the sentence accordingly.

(Five minutes.)

3. As the team members complete the sentence, the facilitator writes the following questions on newsprint:

   ▪ In your opinion how does the sentence completion represent what this team member needs to do for his or her growth?
   ▪ How challenging do you think this undertaking would be for this person?
   ▪ How can you and the other team members support this person in his or her efforts to meet this goal?

4. The team members take turns reading their sentence completions, and then they take turns receiving feedback from the remaining team members in the form of answers to the posted questions. After receiving feedback and any necessary clarification, each team member decides to keep, modify, or completely change his or her growth goal and announces these intentions to the team by restating the final goal. (Fifteen minutes per team member.)

5. The facilitator writes the following incomplete sentences on newsprint:

   ▪ In pursuit of my goal, during the next six months I will....
   ▪ I am asking my fellow team members to help me to achieve my goal by....

Each team member is told to reproduce these two incomplete sentences on paper, leaving plenty of space between them. The facilitator explains that each team member is to complete these sentences by listing at least two actions that he or she will take in the next six months in pursuit of the goal and at least two actions that he or she requests the other team members to take in support of this goal. (Ten minutes.)

6. The team members take turns sharing the items listed during step 5. After each team member shares, the other team members respond briefly with suggestions, positive reinforcement, and statements of willingness to meet the team member’s expectations of them. (Five minutes per team member.)
7. The facilitator leads a discussion by asking the following questions:
   - How did you feel about sharing a growth goal with your fellow team members?
   - What team-member responses were helpful to you?
   - What has this activity done for your team?
   - What have you learned about team support as a result of this activity?
   - Over the next few months, how can you reinforce what you have learned?
   - How will the team members be accountable for accomplishing the growth goals?

   (Fifteen minutes.)

8. Each team member is instructed to keep his or her sheet of paper to refer to from time to time and to bring to a follow-up session to be held in a few months. The facilitator states that during this session progress will be discussed and other growth goals may be planned.

Variations

- In step 2 a different incomplete sentence may be used (for example, “Something that I would like to accomplish in the next few months is...” or “The way in which I would like to be viewed as a team member is...”).
- After step 7 the team members may be asked to contract with one another for desired support.
- This activity may be used to deal with conflict or change, to help new members to become part of a team, or to terminate a team. The last of these options requires different incomplete sentences and discussion questions as well as a different concluding step.
SMACKERS: TEAM MID-LIFE ASSESSMENT

**Goals**
- To provide a mid-life assessment and growth experience for an ongoing team.
- To help the team members to identify behaviors and personal qualities that are valuable within a team.
- To allow the team members to give and receive feedback about the ways in which their behavior and personal qualities are perceived within the team.
- To develop the team members’ ability and willingness to evaluate one another’s behavior and personal qualities in the interest of improving team functioning.

**Group Size**
All members of an ongoing team. This activity is intended to be used with a team whose members have been together for a while and have already had some experience in giving and receiving feedback.

**Time Required**
Approximately two hours. Extra time should be allotted for a team with more than eight members.

**Materials**
- Blank paper and a pencil for each team member.
- For each team member, twice as many Smackers as there are team members. For example, if the team has six members, each member receives twelve Smackers. Prior to conducting the activity, the facilitator prepares the Smackers by reproducing as many copies of the Smackers Sheet as are necessary to obtain the total number of Smackers required for the team. Then the facilitator cuts along the dashed lines to separate the Smackers for distribution.
- A newsprint flip chart and a felt-tipped marker.

**Physical Setting**
A room large enough to accommodate the total team.
Process

1. The facilitator begins the activity by stating that certain types of behaviors as well as personal qualities are valuable within a team: Some of them help the team to accomplish its tasks and goals, and others help the members to work together effectively and harmoniously. Behaviors such as encouraging participation, providing constructive feedback, and supporting an idea other than one’s own are all positive contributions, just as are the personal qualities of openness, sensitivity to others, and flexibility.

2. The facilitator points out that a number of such behaviors and qualities have been obvious within this team and have contributed positively to the team’s progress to this point. The team members are asked to cite which positive behaviors and qualities they have observed during their time together thus far, including but not limited to those just mentioned. As responses are offered, the facilitator writes them on newsprint. (Ten minutes.)

3. The facilitator suggests that a good way in which each member can help the team to grow is to choose one of the behaviors or qualities listed in the previous step and to let each of the other team members know to what extent he or she has demonstrated that behavior or quality. Each team member is told to make this selection privately at this time.

4. Each team member is given blank paper, a pencil, and twice the number of Smackers as there are team members. The facilitator explains that the total number of Smackers given to each team member represents the total level of the chosen behavior or quality demonstrated by the other members during the team’s life to this point. Each team member is instructed to determine how much of the chosen quality or behavior was demonstrated by each of the other team members and to assign numbers of Smackers to each other member accordingly. For example, if a team member sees one of the members as having shown all of the demonstrated sensitivity to others, then he or she assigns all of the Smackers to that member; if that member is seen as having shown half of all the demonstrated sensitivity, then that member is assigned half of all the Smackers; if that member is seen as having shown none of the demonstrated sensitivity, then that member is not assigned any Smackers. Each team member evaluates every other team member in this way. The facilitator encourages the team members to be discriminating as they complete this task and to consider the assigning of Smackers to be a ranking of the team members with regard to their demonstration of the chosen behavior or quality. Each team member is then instructed to make his or her determinations and to fill out the Smackers accordingly, but not to write the chosen behavior or quality on the Smackers. Each team member is also told to make and keep a record of the chosen behavior or quality and how many Smackers he or she assigned to each of the other members. (Twenty minutes.)
5. The team members are asked to distribute their completed Smackers without comment.

6. Each team member in turn announces his or her chosen behavior or quality and gives specific verbal feedback to each of the other team members about why that person received a particular number of Smackers (or no Smackers, as the case may be). During this phase of the activity, the facilitator encourages the recipients of Smackers to share their reactions to this feedback. (One hour.)

7. The facilitator leads a discussion of the following questions:
   - What was your reaction to having to evaluate and discriminate among your fellow team members? What was your reaction to being evaluated?
   - How did you feel while the Smackers were being distributed and received? How did you feel while they were being explained?
   - What was your reaction to the behaviors and qualities that your fellow members value?
   - How has this activity affected your view of yourself as a member of this team? How has it affected your view of your fellow team members? How has it affected your view of the team as a whole?
   - What can you do to increase your demonstration of the behaviors and qualities that your fellow team members value?
   - What can your fellow members do to help you to achieve goals with regard to valued behaviors or qualities?
   - How might this activity help the team to improve its functioning?

Variations

- The process of assigning, distributing, and discussing Smackers may be repeated several times. In this case the entire team should decide before each round which particular behavior or quality will serve as the focus.
- The process can be applied to evaluating the team as a whole. In this case the number of Smackers given to each team member at the beginning of the activity signifies the ideal level of a behavior. Each team member privately evaluates the team’s performance with regard to this behavior, assigns a certain number of Smackers on this basis, reserves the remaining Smackers, and explains the difference publicly.
- After step 7 the team may elect an observer to watch for and record examples of valued behaviors and qualities while the team continues with its regular work. Subsequently, the observer reports his or her findings to the total team.

Submitted by Richard L. Hughes
TEAM EFFECTIVENESS:  
A TEAM-BUILDING ACTIVITY

Goals
- To increase the team members’ understanding of team effectiveness.
- To generate commitment among the team members to identify their interaction dynamics.

Group Size
All members of an ongoing team.

Time Required
Approximately two hours.

Materials
- A copy of the Team Effectiveness Information Sheet for each team member.
- Blank paper and a pencil for each team member.
- A newsprint flip chart and felt-tipped markers.
- Masking tape.

Physical Setting
A room with wall space for posting newsprint.

Process
1. The facilitator discusses the goals of the activity and gives an overview of the design. (Five minutes.)
2. Paper and pencils are distributed, and individual team members are instructed to brainstorm a list of “what makes a group of people effective in accomplishing its objectives.” (Five minutes.)
3. A recorder is appointed to make a “round-robin” listing of these dimensions on newsprint. (Ten minutes.)
4. The facilitator instructs the team to reduce this list to its essential components—not more than six dimensions. Some suggested procedures are:
   - Vote for three;
   - Rank order the top ten; and
Categorize the basic list.

(Fifteen minutes.)

5. The members are directed to create a model or graphic representation of how the dimensions are related to one another. (Twenty minutes.)

6. The facilitator distributes copies of the Team Effectiveness Information Sheet, blank paper, and pencils. The team members are asked to read the handout. Subgroups of two or three members each are formed, and each subgroup creates on newsprint a behaviorally anchored rating scale (BARS) for one or more dimension assigned by the facilitator. The facilitator may duplicate the example of the BARS for “Participation in Meetings” (from the information sheet) on newsprint. (Twenty minutes.)

7. Each subgroup presents its BARS chart(s) to the entire team; the charts are edited by the team for clarity. (Twenty minutes.)

8. The facilitator instructs individuals to respond to each of the rating scales according to how the team members usually work together (before this session). The members are then instructed to rate the effectiveness of the team during this work session. (Five minutes.)

9. The facilitator leads the team in developing a “progress” chart of its effectiveness and in plotting its two sets of ratings obtained so far. (Ten minutes.)

10. The facilitator leads a discussion of the data obtained in the ratings. The team may decide to continue using the rating scales to chart its development in the future. (Ten minutes.)

11. The facilitator draws out learnings from the activity and directs attention to how the team can manage its own effectiveness. (Fifteen minutes.)

**Variation**

- The team can write prescriptions for improving its effectiveness.

Submitted by John E. Jones and Anthony J. Reilly.
TEAM EFFECTIVENESS INFORMATION SHEET

A team’s effectiveness can be studied by breaking down effectiveness into different dimensions and rating the team on each of those dimensions. For instance, team members can use behaviorally anchored rating scales (BARS) to rate their team’s performance in each of several dimensions.

First the team members work individually to list important dimensions of teamwork in which they would like to rate their team. These lists are combined on newsprint, and the team selects the most salient dimensions by some appropriate method (for example, voting for three, ranking, or rating.) Subgroups of two or three members each are formed to correspond to the selected dimensions, and these subgroups construct behaviorally anchored rating scales.

For example, one of the selected dimensions might be participation in meetings. To construct a behaviorally anchored rating scale for this dimension, the subgroup members would draw a continuum with points 1 through 9 (where 1 is the lowest level of that dimension and 9 is the highest), ensuring that the points were equidistant from one another. Then they would verbally define the two extremes of the dimension, 1 and 9; if they wished, they would also verbally define the midpoint between the two extremes (5):

Participation in Meetings

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After a scale has been constructed for each dimension that the team wishes to evaluate, the scales are presented to and edited by the total team. Then the BARS are used to perform ratings to generate data for discussion.

An example of using this technique comes from team building. In sensing interviews the members of one particular team had voiced dissatisfaction with their weekly staff meetings. At the beginning of the off-site session, the team constructed BARS on six different aspects of effective staff meetings, such as cooperation, open communication, and attention to process. These scales were then used by individuals to rate their usual meetings and that particular meeting. A progress chart was constructed on which averages were posted. The BARS were used at the end of each three-hour segment of the team-building session and became the basis for team self-assessment at ensuing regular staff meetings.
POWER AND AFFECTION EXCHANGE: SHARING FEELINGS

Goals
- To offer the team members an opportunity to express their feelings for one another.
- To explore the members’ feelings about power and affection.

Group Size
All members of an ongoing team.

Time Required
Approximately two hours.

Materials
- Four 3" x 5" index cards for each team member. Two of these cards should be of one color to designate them as “power” cards, and the other two should be of another color to designate them as “affection” cards. (In order to differentiate the cards in the “Process” section of this activity, the “power” cards are referred to as “white” and the “affection” cards are referred to as “pink.” The facilitator may choose any two colors that he or she wishes.)
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
A room with enough floor space for the team members to move around freely.

Process
1. The goals of the activity are introduced.
2. Each team member is given two white cards, two pink cards, and a pencil.
3. The facilitator explains the card-exchanging procedure as follows:
   “Your white cards represent power, and your pink cards represent affection. In a few minutes, you will write your name on each of your pink affection cards; you will not write your name on any of the white power cards. Then you will be asked to begin a process of distributing the cards to your fellow group members. No talking will be
allowed during this exchange period. You may give pink cards to those members for whom you feel affection, and you may give white cards to those members who you feel will make the best use of power. What you do with your cards, however, is entirely up to you: For example, if you want to keep them all and not participate in the exchange, you may do so; if you want to give several to the same person, you may also do that. In addition, you need not keep any cards you receive; if you wish, you may give them to someone else. Keep in mind that this means your affection and power cards may end up in the hands of people you did not intend to receive them.

“After the card transactions have been completed, those who are holding the power cards will vote on a way to show the affection that has been indicated by the distribution of the affection cards; each power card entitles the person holding it to one vote.”

4. The facilitator elicits and answers questions about the procedure and ensures that the team members understand it fully.

5. The following questions are asked:

- How will you feel if you cannot give a card to every person you would like?
- How will you feel if you receive no cards?
- How will you feel if you give a card to someone who then gives it to another person?
- What concerns or fears do you have about participating in this activity?

(Ten minutes.)

6. The team members are told to write their names on their affection cards. Then the facilitator asks them to stand up and begin the exchange period and reminds them that they are not to talk to one another during this period.

7. After all transactions have been completed, the members are asked to be seated. The facilitator asks the following questions:

- What happened to you during the exchange period?
- How are you feeling at this moment?
- How do you feel about the cards you received?
- How did you feel about giving cards to others?
- What surprises did you experience in giving cards? What surprises did you experience in receiving them?

(Thirty minutes.)

8. The facilitator asks the team members who hold power cards to volunteer suggestions about how the affection represented by the pink cards should be shown. These suggestions are written on newsprint, and each member who holds power
cards is instructed to vote on the one suggestion that he or she likes best. Those with power cards are reminded that each card entitles the holder to one vote. (Ten minutes.)

9. The results of the vote are announced, and the team members are instructed to carry out the chosen procedure for showing affection. (Twenty minutes.¹)

10. The facilitator leads a concluding discussion by asking the following questions:
   - How did you feel about using the chosen method for showing affection?
   - How do you feel about the way power was handled in choosing the method?
   - What insights have you gained about displaying and receiving displays of affection? What have you learned about displays of power?
   - How can you use what you have learned to enhance the effectiveness of your team? What might you do differently as a result of this activity?

**Variations**

- The team members may be asked to write suggestions on their power cards of ways in which they feel affection should be shown.
- A rule may be established that the members are not allowed to give away the cards they receive.
- After step 9 the team members may be asked to show affection in any way with which they feel comfortable.

¹ The origin of this activity is unknown. This version was submitted by Gustave J. Rath.

¹ The time indicated for this step is an approximation only; it varies according to the procedure chosen for showing affection.
LEADERSHIP ABILITIES: CONSTRUCTIVE CRITICISM

**Goals**
- To provide an opportunity for the team members to give and receive feedback regarding their leadership abilities.
- To give the members experience in evaluating themselves and others in a constructive, concrete manner.

**Group Size**
All members of an ongoing team.

**Time Required**
Approximately two hours for a team of four to six members. (A larger team may require considerably more time.)

**Materials**
- A copy of the Leadership Abilities Rating Form for each team members.
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.

**Physical Setting**
A room with chairs and writing surfaces.

**Process**
1. The facilitator briefly explains the activity and its goals and then delivers a lecturette on these ten components of leadership: flexibility, fairness, sensitivity to others, supportiveness, openness, decisiveness, knowledgeability, resourcefulness, judgment, and dedication. As each of these components is presented, it is written on newsprint. (Fifteen minutes.)
2. Each team member is given a copy of the Leadership Abilities Rating Form and a pencil and is asked to complete the form. (Twenty minutes.)
3. The team members are instructed to share their ratings, concentrating on the leadership performance of one member at a time: The individual member being focused on receives feedback from the other members and then shares his or her
self-ratings; subsequently, the entire team discusses the similarities and differences between the self-assessments and the assessments made by the other members. (Forty-five minutes.)

4. The facilitator elicits what the team members learned about leadership, themselves, and the process of giving and receiving feedback. (Twenty minutes.)

5. The facilitator asks each team member, in turn, to select one way in which he or she would like to improve leadership performance and to discuss an improvement plan with fellow team members. The listening team members are to participate actively in this process, responding with encouragement.

Variations

- The team members may be asked to establish their own lists of leadership abilities and to evaluate one another on the basis of these abilities.

- During step 2 each team member may be asked to guess how the other members will rate him or her.

- The activity may be altered so that only the team leader is rated.
# LEADERSHIP ABILITIES RATING FORM

*Instructions:* Rate yourself and every other member of your team on each of the ten leadership abilities listed below. Use a scale of 1 to 10, where 1 represents the lowest demonstration of a given ability and 10 represents the highest.

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### 9. Judgment

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### 10. Dedication

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TEAM MIRROR: A FEEDBACK EXPERIENCE

Goals
- To generate data that can permit a team to diagnose its functioning.
- To establish avenues of feedback between a team and other groups with which it is linked—departments, customers, etc.

Group Size
All members of an ongoing team plus any nonmembers that the team decides to invite.

Time Required
Approximately two hours.

Materials
- A newsprint flip chart and a felt-tipped marker.
- Masking tape.

Physical Setting
A room with chairs but without tables. Adequate wall space should be available for posting newsprint sheets.

Process
1. In advance of the “mirroring” meeting, the facilitator helps the team to decide which nonmembers are to be invited to come to the meeting for the purpose of providing the team with feedback and how these nonmembers are to be oriented. The team asks these people to come to the meeting.
2. The team leader conducts the meeting, while the facilitator helps the team members to behave nondefensively and to listen to the feedback. One member makes notes on newsprint and posts the data as generated. Nonmembers are encouraged to be open and specific in giving feedback; the team leader assures them that the purpose of the meeting is to help the team to improve its effectiveness.
3. The team members discuss their plans for the data and contract to follow through with the invited nonmembers. The facilitator helps the team members to focus on processing the data rather than on responding to the feedback.
4. After the meeting the facilitator gives feedback to the team leader on the way in which he or she conducted the meeting.

Variations

- After receiving feedback the team can assemble in the center of the room for initial reactions. This meeting can be interrupted for the team to receive additional feedback on its process.
- A follow-up meeting can be announced as a part of the invitation to the original meeting.
- The facilitator can interview nonmembers instead of inviting them to attend a meeting.
- The team members can survey individuals in other teams, departments, or units with which it is linked.
AFFIRMATION OF TRUST: A FEEDBACK ACTIVITY

Goals

- To increase understanding of physical, intellectual, and emotional trust.
- To explore how the trust level existing in the team affects the openness of discussion.
- To provide an opportunity for the team members to give one another feedback on trust.

Group Size

All members of an ongoing team.

Time Required

Approximately two hours.

Materials

- For each team member, as many 3" x 5" index cards as there are team members.
- One Affirmation of Trust Sheet for each team member.
- A pencil for each team member.

Physical Setting

A room large enough for the activity.

Process

1. The facilitator introduces the activity and outlines the goals.
2. The facilitator asks each member to take two to three minutes to describe to the other members a childhood experience that made a strong impression on him or her. The facilitator checks to see that everyone has a chance to speak in the time provided. (Twenty-five minutes.)
3. The facilitator directs the members to discuss the following (twenty minutes):
   - What kind of situations cause you to be afraid?
   - What kind of life situation do you wish to have at some time in the future?
What makes you happy?

What do you do best?

4. The facilitator instructs each member to remove a shoe and to place it alongside the shoes of other members in a designated place, outside the team’s meeting area. Each member is given the appropriate number of 3" x 5" cards and a pencil and is instructed to identify his or her shoe by writing his or her name on one of the cards and putting that card in front of the shoe.

5. The facilitator distributes copies of the Affirmation of Trust Sheet and directs the members to take a few minutes to familiarize themselves with this sheet.

6. Each member is directed to select a maximum of five statements from the Affirmation of Trust Sheet that best describe his or her trust in another member of the team; to write the other member’s name, the numbers of the applicable statements, and his or her own signature on a 3" x 5" card; and to deposit the card in the other member’s shoe. Each member is instructed to do this for every other member of the team. (Some statements may be duplicated.)

7. After all members have distributed their cards, each one retrieves his or her own shoe with the cards left in it, reads each of the cards, and records the numbers on his or her Affirmation of Trust Sheet. (Names of members giving the feedback may also be recorded.)

8. Members discuss their reactions to their cards with the team. Team members are encouraged to solicit clarification of their feedback.

9. The facilitator leads the team in a discussion of the experience, focusing on its goals.

Variations

- Steps 2 and 3 can be omitted.
- Team members can be instructed to distribute as many of the thirty-four statements as they wish to.
- The statements can be preprinted on individual strips of paper and given to each team member—in packages of thirty-four each.
- The statements on the Affirmation of Trust Sheet can be written or adapted to deal with specific issues in the team.
- Team members can be directed to distribute cards only to people of their choice.

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Submitted by Brian P. Holleran.
AFFIRMATION OF TRUST SHEET

1. I would trust you to share your happiness with me.
2. I would trust you to hold my money.
3. I would trust you to care for my children.
4. I would hope that you would tell me how others perceive me.
5. I would trust you to help me if I were incapacitated in some way.
6. I would hope that you would give me help if I needed it.
7. I would trust you to keep an appointment with me.
8. I would hope that you would tell me if I sound phony.
9. I would hope that you would share some good fortune with me.
10. I would trust you to be honest with me.
11. I would trust you not to gossip about me in my absence.
12. I would trust you to keep secret any disclosure of some intimacy I shared with you.
13. I would trust you enough to tell you about those I love.
14. I would trust that you would be an excellent traveling companion for a trip abroad.
15. I would trust you to be executor of my estate.
16. I would trust you to drive my car.
17. I would trust you to pay back any money I might lend you.
18. I would trust you to live in and take care of my apartment/house in my absence.
19. I would trust you to complete any task I might give you.
20. I would hope that you would give me a place to sleep if I needed it.
21. I would hope that you would freely give me your friendship.
22. I would hope that you would offer me emotional support when I needed it.
23. I would seek your advice on interpersonal relationships.
24. I would hope that you would share some of your free time with me.
25. I would share my creations with you.
26. I would trust you with my life.
27. I would hope to be comfortable with you without having to talk.
28. I would trust that what you say is based on fact and not fabrication.
29. I would trust you to allow me to vent my anger about other people or events.
30. I would trust your views about political matters.
31. I would hope that you would express the degree of affection you have for me.
32. I would trust you enough to share my feelings toward you.
33. I would trust you to fix me up with a blind date.
34. I would trust you to represent me astutely in business affairs.
IMAGES: ENVISIONING THE IDEAL TEAM

Goals

- To provide an opportunity for the team members to receive feedback from one another about the perceived image of the team.
- To enable the members to examine the behaviors that lead to particular images of a team.
- To assist the members in developing images by which they would like their team to be known.
- To help the members to develop ways of actualizing these images.

Group Size

All members of an ongoing team.

Time Required

Two to two and one-half hours.

Materials

- Several sheets of blank paper, a pencil, and a clipboard or other portable writing surface for each team member.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.
- 3” x 5” index cards for casting votes (see steps 10 through 12).

Physical Setting

A room in which the team members can work without being interrupted. Chairs should be provided.

Process

1. The facilitator announces the goals of the activity and briefly discusses the importance of visions in shaping organizational reality. (Five minutes.)
2. The facilitator lists the following descriptors on newsprint and explains that they are labels that might be applied to a team:

- stable
- warm
- cooperative
- calm
- dynamic
- cool
- competitive
- hurried

The facilitator states that there is nothing inherently good or bad about any of these descriptors and that they can be seen as attractive or unattractive depending on one’s values.

3. Each team member is asked to think of the most important descriptor by which he or she would like the team to be known. The facilitator explains that each team member’s chosen descriptor should be one that he or she wishes that others with whom the team interacts—clients, coworkers, constituents, or the organization or the public at large—would use to describe the team at some specified future time. It is also explained that the team members need not choose terms from the newsprint list and that this list is intended merely as a stimulant for their thinking. (Five minutes.)

4. The team members take turns announcing their descriptors. The facilitator records these terms in a single column on a sheet of newsprint and then assists the team members in achieving consensus about a maximum of five descriptors that they wish to keep as part of the image they want to create for their team. (Ten minutes.)

5. Each team member is asked to look over the terms on the final newsprint list generated in the previous step and to think of opposites for the descriptors listed. The facilitator explains that an opposite may be the inverse or the absence of a descriptor, or it may be the presence of a contrary attribute. To clarify, the facilitator gives the following example:

The opposite of comfort might be (a) discomfort, (b) a neutral state, or (c) pain. (Five minutes.)

6. The team members generate opposites, and the facilitator lists these terms in a column parallel with their corresponding desired descriptors. When multiple terms are listed for a particular item, the facilitator helps the team to achieve consensus about which term should be chosen as the opposite. When the team members are in agreement about the descriptors and their opposites, the facilitator records the final list on a new sheet of newsprint and posts the sheet in a prominent place where all team members can see it. (Fifteen minutes.)

7. The facilitator assembles pairs and then assigns one or two dimensions (a desired descriptor and its opposite, the undesired descriptor) to each pair. The facilitator announces that each pair is to develop a set of behaviors for each dimension that it has been assigned. It is explained that each pair is to consider what behaviors on the part of a team member would evoke the desired descriptor and what behaviors
would evoke the undesired descriptor. The facilitator explains the following criteria for generating sets of behaviors:

- The behaviors must be things that a team member could do rather than think or feel.
- The behaviors must be ones that could be repeated frequently on the job or that, when performed, are critical to the operation of the team.
- Both partners must agree on the chosen behaviors.

Each team member is given several sheets of blank paper, a pencil, and a clipboard or other portable writing surface to use in completing the task. The facilitator announces that the pairs should be prepared to present and explain their chosen behaviors when called on to do so. After ensuring that the team members understand the task, the facilitator asks the pairs to begin. (Twenty minutes.)

8. The facilitator reassembles the total team. The pairs take turns presenting the chosen behaviors for the dimensions that they were assigned. As each pair presents, the facilitator records the desired descriptor and its associated behaviors as well as the undesired descriptor and its associated behaviors. After each pair concludes its presentation, the facilitator elicits questions and ensures that the team members understand the presentation. As each pair’s newsprint list is completed, the facilitator posts it in a prominent place. (Fifteen minutes.)

9. The facilitator announces that the next step is to determine the team’s present image with regard to each dimension. The following continuum is drawn on newsprint:

```
  1 2 3 4 5
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The facilitator explains that to establish the present image for each dimension the team members will use a scale of 1 to 5, in which 1 represents the undesired descriptor and 5 represents the desired descriptor. The facilitator writes the descriptors for the first of the team’s chosen dimensions directly under the continuum in the appropriate places. The following is an example of the completed newsprint continuum:

```
  1 2 3 4 5
Competitive  3 4 5 4 3
Cooperative   2 1 2 3 4
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10. Each team member is given an index card and is asked to write on it the number representing his or her evaluation of the team’s present image with regard to the first dimension.
11. The facilitator collects all index cards and records the team members’ evaluations as tick marks on the continuum.

12. The evaluation process (steps 10 and 11) is repeated for each of the other dimensions that the team has established.

13. The facilitator leads a discussion based on the posted evaluations. Subjects discussed include the following:
   - Dimensions for which the team is presently very close to the ideal (close to 5 on the continuum);
   - Similarities as well as differences in perceptions and what they might mean; and
   - Patterns in the evaluations and what they might mean.
   (Fifteen minutes.)

14. Each team member is asked to work alone to list for each dimension one thing that he or she intends to do to move the team’s image toward the ideal. Then the team members take turns sharing their lists. The facilitator records each member’s commitments on newsprint and gives the completed newsprint to one member to keep for use during a follow-up session. (Ten minutes.)

15. The facilitator elicits reactions to the activity and suggests that the team members keep their lists of personal commitments and refer to them from time to time. Before adjourning, the team sets up a follow-up meeting during which the members will review their commitments and their progress toward actualizing the team’s ideal image.

**Variations**

- In step 7 the team as a whole may develop the behaviors that would evoke the desired and undesired descriptors.
- If a high degree of trust exists in the team, in step 10 the members may call out their numerical evaluations instead of writing them on index cards.
- In step 14 the members may decide as a team what they would need to do to move toward the desired descriptors.
- The focus may be narrowed to a particular task for which the team is responsible.

Submitted by Joseph E. Garcia and Ken S. Keleman.
THE GENIE’S WISH: IDENTIFYING AND ADDRESSING TEAM NEEDS

Goals

- To offer the team members an opportunity to identify what they need, both individually and as a team, to work effectively and to learn ways in which those needs might be met.
- To surface important team issues and to encourage team growth.
- To foster the team members’ problem-solving skills.
- To offer the team members an opportunity to practice visualizing (as a part of the guided-imagery process).
- To help the team members to understand their individual task approaches and how the combination of these different approaches can enhance the team problem-solving process.

Group Size

All members of an ongoing team.

Time Required

A minimum of two hours and fifteen minutes, based on a five-member team. (A period of ten minutes extra is required for each additional member over five.)

Materials

- A sheet of paper and a pencil for each team member.
- Several sheets of newsprint and a felt-tipped marker for each team member.
- Masking tape for posting newsprint.
- A box in which to collect the team members’ sheets of paper.
- A newsprint flip chart and a felt-tipped marker for the facilitator’s use.

Physical Setting

A room with plenty of space for the team members to spread out while preparing their presentations (see step 8). Tables or other writing surfaces and comfortable chairs should be provided.
Process

1. The facilitator introduces the goals of the activity.

2. The team members are instructed to make themselves as comfortable as possible and to close their eyes. After a brief explanation of the process of guided imagery, the facilitator reads the following comments, pausing as indicated between statements:
   - Imagine that you are at work. [Pause.]
   - Go to your own office or work station. Try to see everything with fresh eyes, taking in as many details as you can. See yourself working. What do you need to be more effective in your job? [Pause.]
   - Now travel slowly through your team’s entire area. See each member of your team working there. What does your team need in order to work as effectively as possible? [Pause.]
   - When you are ready, slowly come back to the present situation and open your eyes. [Pause.]

3. The facilitator tells the team members to pretend that a genie will grant each of them one wish. Each team member is instructed to choose one wish based on the needs identified in the guided-imagery experience. (Five minutes.)

4. Each team member is given a sheet of paper and a pencil and is told to write his or her wish, describing it in as much detail as necessary—but using no more than half of the sheet—and stating it in positive, optimistic terms. Then each team member is instructed to fold the paper in such a way that what has been written is completely concealed. (Five minutes.)

5. The facilitator collects the folded sheets of paper in a box, mixes them, and then asks each team member to take one. Any member who draws his or her own paper is instructed to refold and replace that paper and to take another.

6. After everyone has drawn a sheet of paper, the facilitator explains that each team member is to spend ten minutes describing how the written wish could be implemented. The facilitator gives the following guidelines for completing the task:
   - Everyone is to work independently; no one may ask for or accept clarification of the written wish.
   - No written wish may be changed in any way.
   - The implementation description is to be written on the blank half of the sheet of paper.
   - The description must include a discussion of all resources necessary for implementation, including such elements as money, skills, time, energy, and approval.
Each team member is to write in positive terms; comments like “It can’t be done” or “We tried this before and it didn’t work” or “The budget won’t allow this kind of expense” are not permitted.

After completing the task, each team member is to fold the paper in such a way that all writing is concealed.

The facilitator elicits and answers questions about the task and then asks the team members to begin.

7. After ten minutes the facilitator again collects the folded sheets of paper in a box, mixes them, and asks each team member to take one. Any member who draws a paper that he or she has worked on previously (either the wish or the implementation) is instructed to refold and replace that paper and to take another.

8. When everyone has a sheet of paper, the facilitator states that each team member is to spend twenty minutes preparing a presentation designed to promote or “sell” the wish and implementation that he or she has drawn. The following task guidelines are provided:

- Each presenter must work independently; no consultation with others is allowed.
- Neither the originator of the wish nor the person who described how to implement that wish may be identified. (If the presenter speculates about who wrote either, he or she is not to announce these speculations to anyone.)
- The presenter may not change the wish or implementation in any way, and no negative aspects of any wish or implementation are to be presented. The presenter is to promote the wish and its implementation regardless of how he or she personally feels about them.
- Each presentation should be kept to a maximum of five minutes.

The facilitator adds that the team members are not to assume that any team member is in favor of a particular wish simply because he or she has given a presentation promoting that wish. After eliciting and answering questions about the task, the facilitator gives each team member several sheets of newsprint and a felt-tipped marker, explaining that everyone should prepare visual aids to accompany the presentation. Then the team members are told to begin.

9. After twenty minutes the facilitator asks the team members to stop their work and to take turns making their presentations. As each presentation is made, the presenter posts the visual aids that were prepared. At the conclusion of each presentation, the facilitator leads the group in applause. After all presentations have been made, the facilitator makes concluding comments and briefly summarizes the highlights of the presentations, emphasizing that every positive step starts as a wish and that cooperation among people is often needed to turn a wish into reality. (Five minutes per team member plus fifteen minutes for the facilitator’s comments and summary.)
10. The facilitator asks the team members to spend twenty minutes sharing information about who wrote the wishes and implementations and about the various individual approaches taken to the tasks involved in the activity.

11. The facilitator leads a discussion based on these questions:

- How did you feel when writing your wish?
- How did you feel when determining how to implement someone else’s wish?
- How did you feel when you heard the wish or the implementation you wrote being presented by someone else?
- How did you feel about having to promote a wish and an implementation that were written by other people?
- What common themes were brought out in the wishes and implementations? What important issues have been raised?
- What is the value of having to promote other people’s ideas regardless of whether you feel they are good? What are the benefits to the team?
- What did you learn about individual team members’ approaches to wishing, implementing, and presenting? How did the individual approaches of the wisher, the implementer, and the presenter contribute to each wish? How might these different approaches be useful the next time the team is faced with a problem to solve?
- What did you learn about your team during this activity? What did you learn about the process of wishing for something?
- Based on the outcome of this activity, how would you assess your team’s skills at visualizing needs? How would you assess the team’s problem-solving skills?
- How can you use what you have learned to help the team improve its efficiency and productivity in the future?

(Twenty minutes.)

12. The facilitator asks a volunteer to collect the newsprint visual aids, to create a handout that summarizes the presentations, and to distribute a copy of the handout to each team member. The members are instructed to keep their handouts for use during a future session at which they will decide which wishes the team wants to turn into reality and determine action steps for implementation; then a date, time, and place are set for the follow-up session.

Variations

- After step 12 the facilitator may continue the process described in that step instead of arranging a follow-up session.
Instead of asking the team members to implement and promote individual wishes, the facilitator may instruct them to work together to develop a collage of wishes and how they fit together.

The wishes may be used as the focus of a task with which the team has been charged (for example, a new product, process, or system).
IT’S IN THE CARDS:
SHARING TEAM PERCEPTIONS

Goals

- To help the team members to clarify how they perceive
  - themselves as team members,
  - their fellow team members,
  - the team as a whole, and
  - the team’s relationship to the organization.
- To offer the team members an opportunity to share their perceptions and to provide one another with feedback.
- To assist the team members in working through the issues surfaced during the activity.

Group Size

All members of an ongoing team. Note: Because this activity involves a high degree of risk, it should be used after the team has completed several other team-building activities that involve less risk.

Time Required

Approximately three hours, depending on the number of team members.

Materials

- A copy of the It’s in the Cards Instruction Sheet for each team member.
- At least as many decks of assorted kinds of playing cards (for example, tarot, Old Maid, jumbo, miniature, corporate, airline, round, patterned) as there are team members.
- Newsprint reproductions of the discussion questions in step 5. Before conducting the activity, the facilitator writes each of these questions on a separate sheet of newsprint.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

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1 An excellent source of various cards is the Best of Cards Catalogue, which is available from U.S. Games Systems, Inc., 179 Ludlow Street, Stamford, CT 06902, phone (203) 353-8400.
**Physical Setting**

A large room in which the team members can work without disturbing one another. Each team member should be provided with a separate table or work surface and a movable chair, and the tables or work surfaces should be placed well apart. In step 3 the facilitator may dump the cards either on the floor or on a table provided for that purpose.

**Process**

1. The facilitator explains the goals of the activity.
2. Each team member is given a copy of the instruction sheet. After the team members have read the handout, the facilitator elicits and answers questions about the task. (Ten minutes.)
3. The facilitator opens the packages containing the decks of cards, dumps the packages on one of the tables or on the floor, and emphasizes the following points:
   - Each team member should choose at least one card to represent each team member, including himself or herself; at least one card to represent the team as a whole; and at least one card to represent the total organization.
   - After selecting cards each team member should be seated at a separate table or work surface to create the representation.
   - The team members have thirty minutes to complete the task. During the work period, the facilitator keeps the team members apprised of the remaining time. (Thirty minutes.)
4. The team members are instructed to stop their work and to take turns sharing their representations. (The representations are left on the tables or work surfaces, and the total team moves around the room to view them one at a time.) The facilitator tells the team members that while a representation is being shown and explained, it is permissible to ask for clarification but not to express reactions, thoughts, or feelings. (Approximately five minutes for each representation.)
5. The facilitator reveals and posts the following questions one at a time and leads a discussion based on these questions, recording team-member responses for each:
   - How are you feeling at this moment?
   - What feelings, thoughts, reactions, or observations would you have liked to share while the representations were being shown and explained?
   - Which team members do you need to talk with as a result of this activity?
   - Now that you have viewed the different representations, what issues seem to be blocking the team and keeping it from functioning as well as it might?
   - What can you do to help the team improve its functioning?
What can the team do to contribute more to the organization?

What can the team do to improve the organization’s perception of the team?

(Thirty minutes.)

6. The facilitator assists the team members in reviewing the issues raised in the newsprint answers and deciding the order in which to address these issues. (Ten minutes.)

7. The facilitator leads the team in action planning to deal with as many of the identified issues as possible within the remaining time. During this discussion important points are noted on newsprint. (One hour.)

8. If any issues have not yet been addressed at the end of the discussion period, the facilitator suggests deferring them until a follow-up meeting and elicits the members’ commitment to a date and time for follow-up. The facilitator asks for a volunteer to reproduce in handout form and distribute to all members the newsprint sheets of questions and answers as well as the important points written on newsprint during the previous step. The facilitator encourages each member to read and study the distributed material, to consider reviewing it formally within the team from time to time, and to bring it to the follow-up session if one has been planned. Then the activity is concluded.

Variations

- After step 5 the team members may work together to generate a single representation of the team or organization.
- The activity may be continued by working through any remaining issues (instead of waiting for a follow-up session).
- The activity may be shortened by waiting until a follow-up session to address all issues. However, the identification of issues should not be postponed until follow-up; also, the facilitator should assure the members that all identified issues will be addressed.
- After step 5 the team members may share their personal feelings and perceptions about their own team roles.
- At the conclusion of the activity, the members may work together to create a team logo or motto.
- After step 6 the members may begin to meet in pairs with those identified in responses to the third question of step 5.
- The facilitator may use several decks of the same kind of cards. Using the same kind of cards might make it easier for the team members to compare their representations.

Submitted by Frederick A. Miller, Judith H. Katz, and Ava Albert Schnidman. This activity was initially developed by the late Kaleel Jamison.
The facilitator will provide your team with several decks of cards. During this activity you are to choose cards to represent the individual members of your team, including yourself; the team as a whole; and the total organization. Then you are to arrange these cards in a way that depicts (1) each individual’s relationship to the other individual members, (2) each individual’s relationship to the team as a whole, and (3) the entire team’s relationship to the organization. After you have completed your work, you should be prepared to share your representation with your team. Here are some issues to consider as you select cards and arrange them:

1. What it is like to be part of the team;
2. What it is like to do your specific job;
3. What it might be like to do another team member’s job;
4. The benefits and drawbacks of your job;
5. The fears, concerns, joys, hopes, opportunities, and risks that you may see or experience;
6. Each individual member’s ability/willingness to function as a team player;
7. Relationships among members;
8. The team’s environment, culture, attitudes and behaviors with regard to conducting business, and norms and values;
9. The degree to which the team functions in accordance with expressed organizational values and goals; and
10. How the team is perceived in the organization.
**BASES OF POWER: DEVELOPING THE TEAM’S POTENTIAL**

**Goals**
- To acquaint the team members with the different bases of power.
- To assist the team members in identifying the power bases resident in their team and how those forms of power affect the team.
- To assist the team members in recognizing their own potential for developing and using power.
- To assist each team member in creating an action plan for enhancing his or her power bases.

**Team Size**
All members of an ongoing team.

**Time Required**
Approximately three to three and one-half hours for a team with six members. (A team with more than six members may require considerably more time.)

**Materials**
- A copy of the Bases of Power Information Sheet for each team member.
- A copy of the Bases of Power Matrix Sheet for each team member.
- A copy of the Bases of Power Work Sheet for each team member plus several extra copies in case the members need them (see Process, step 7.)
- A pencil for each team member.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

**Physical Setting**
A room that is large enough for subteams of three or four members each to hold discussions without disturbing one another. Movable chairs should be provided for the team members. If tables or desks are not available, the facilitator should provide clipboards or other portable writing surfaces.

**Process**
1. The facilitator introduces the activity by explaining its goals.
2. Each team member is given a copy of the Bases of Power Information Sheet and is asked to read this handout. (Five minutes.)

3. The facilitator elicits and answers questions about the definitions on the information sheet. (Five minutes.)

4. The facilitator leads a discussion based on these questions:
   - Which combinations of these seven power bases could one individual possess? How would these various combinations of power bases affect an individual’s organizational life? How would they affect a team whose members possessed those power bases?
   - Which of the power bases are not likely to reside together in the same individual? Why? (Ten minutes.)

5. The facilitator asks the team members to begin thinking about which power bases they possess. Each member is given a copy of the Bases of Power Matrix Sheet and a pencil; the facilitator reviews the instructions with the members and asks them to complete the matrix. (Ten minutes.)

6. After all team members have completed the matrix, the facilitator asks them to focus on one person at a time and to share whether they believe that person has each of the seven power bases. As the information is shared, the facilitator records it on newsprint. After all evaluations have been shared for one person, the facilitator asks these questions of that person:
   - What are the discrepancies between how you see yourself and how the others see you?
   - What do you think or feel about those discrepancies?

This procedure is followed for each team member. All newsprint information about the members’ power bases remains posted throughout the remainder of the activity. (Ten to fifteen minutes per team member.)

7. The facilitator asks the team members to assemble into subteams of three or four members each. The facilitator distributes copies of the Bases of Power Work Sheet and asks the members of each subteam to focus on one member at a time and to assist that member in formulating answers to the work-sheet questions and in developing an action plan for enhancing his or her power bases. The facilitator announces that later the members will take turns reporting the highlights of their plans. While the subteams work, the facilitator monitors their activities, providing assistance as necessary and offering extra copies of the work sheet as needed. (Approximately twenty minutes per team member.)
8. The facilitator reconvenes the total team and asks the members to take turns reporting the highlights of their action plans. After each report the members are encouraged to share their comments and reactions. (Fifteen minutes.)

9. The facilitator leads a brief concluding discussion about the team members’ reactions to the activity and then makes arrangements for a follow-up session to review progress.

**Variations**

- If the team has five or fewer members, the facilitator may eliminate the use of subteams.
- The team members may be asked to read the materials referenced in the Bases of Power Information Sheet prior to the activity.
- During or after step 7, the team members may contract with one another to provide support as they attempt to develop new power bases.
- More time may be spent in step 6 in eliciting answers to the questions provided.

Submitted by Mary Harper Kitzmiller and Carol Nolde.
BASES OF POWER INFORMATION SHEET

Without power, leadership is not possible. This statement, of course, does not imply that with power, leadership is guaranteed. It simply means that power is an essential ingredient of leadership. However, everyone has a degree of power. Even an infant possesses power. Who can resist a baby’s smile? Or who can ignore the loud cries of a baby when the child is wet and hungry? In the first example, the baby has a referent power base; in the second, the infant has coercive power. French and Raven (1959) identified the first five bases of power discussed below; Raven and Kruglanski (1975) identified the sixth base; and Hersey, Blanchard, and Natenmeyer (1979) identified the seventh. These bases of power can be explained as follows:

1. **Legitimate power.** If your ability to influence the behavior of someone else is based on your position in an organization, you possess legitimate power. In other words, if losing your position or title would mean the loss of power, you have a legitimate power base. You can demand compliance of certain people because such authority has been granted to you by the organization. The people over whom you exert legitimate power know that noncompliance would mean certain sanctions (for example, the loss of their jobs).

2. **Coercive power.** If your ability to influence the behavior of someone else is based on fear, you have coercive power. This fear can take many forms (for example, fear of retribution, fear of punishment, or even the fear of appearing inadequate).

3. **Reward power.** Closely related to coercive power is reward power. If your ability to grant rewards influences the behavior of another person, you have a reward power base. Rewards can be as simple as a smile of approval or as significant as a promotion.

4. **Referent power.** If your ability to influence the behavior of another person is based on your personal traits, you possess referent power. You are so admired for your personal qualities—perhaps for your charisma—that others want to be identified with you. They are willing to pay for a close association with you, and you thus wield power over them.

5. **Expert power.** If your ability to influence the behavior of another person is based on your expertise in some area, you have an expert power base. Your expertise may be necessary for another person to do his or her job satisfactorily—or superbly; therefore, the person complies with your desires in order to receive your expertise.

6. **Information power.** Closely related to expert power is information power. If your ability to influence the behavior of someone else is based on information you possess or have access to, you have an information power base. As with an expert power base, the information you have or can obtain may be so valuable to another person’s job or prestige that he or she is willing to comply with your wishes in order to receive the information.
7. *Connection power.* If your ability to influence the behavior of another person is based on your “connections” with important people, you possess *connection* power. Although you may not be able to grant rewards, sanctions, information, or expertise and although you may have no legitimate power in the organization, your contact with influential people gives you unmistakable power.

**REFERENCES**


**BASES OF POWER MATRIX SHEET**

*Instructions:* Your task is to decide-on the basis of your own personal opinion-whether each member of your team, including yourself, has each of the seven different power bases. Evaluate yourself first, writing your initials in the appropriate column. Think about whether you have a legitimate power base. If you decide that you do, write a check mark (✓) in the box for Legitimate under your initials; if you decide that you do not, leave that box blank. After you have determined whether you have each of the seven power bases (Legitimate, Coercive, Reward, Referent, Expert, Information, and Connection) and marked the corresponding boxes accordingly, list your fellow team members’ initials in the boxes provided; then consider each team member in turn, deciding whether that person has each of the seven power bases and marking the appropriate boxes accordingly.

<table>
<thead>
<tr>
<th>Power Base</th>
<th>My Initials</th>
<th>Other Team Members’ Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legitimate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coercive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reward</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referent</td>
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<tr>
<td>Expert</td>
<td></td>
<td></td>
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<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connection</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
BASES OF POWER WORK SHEET

Instructions: The following questions are intended to help you in formulating the action plan on the next page. Discuss your answers with your fellow subteam members, jot down your ideas, and then complete the action plan with specific information.

1. How could you make greater use of the power bases you presently have? How might the team be affected if you were to make greater use of your present power bases?

2. What new power bases would you like to develop? How might those power bases affect the team?

3. How could you go about developing those new power bases in a way that would benefit both you and the team?

4. How might your fellow team members help you in your efforts to develop new power bases?

5. What will be your time lines for developing present and new power bases?
<table>
<thead>
<tr>
<th>Present Power Bases (List)</th>
<th>Steps to Enhance Assistance Needed From Line on team</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Power Bases Desired (List)</td>
<td>Steps to Develop Assistance Needed From Line on team</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
STRENGTHS AND NEEDS: USING FEEDBACK FOR TEAM DEVELOPMENT

Goals

- To provide an opportunity for the team members to give one another feedback about the strengths they bring to their team.
- To offer the team members a chance to identify what they like on the job and what they would like to change and then to share this information with one another.
- To provide a structure through which the team members can express what they need from one another.
- To provide an opportunity for the team members to do action planning based on their strengths, likes, items they would like to change, and needs.

Team Size

All members of an ongoing team.

Time Required

This activity is conducted in two sessions. Session 1, sharing feedback, requires two to three and one-half hours, depending on the size of the team. Session 2, action planning based on the information shared in the first session, requires approximately three hours.

Materials

Session 1

- For each team member, enough copies of Strengths and Needs Work Sheet A to equal the number of other members. (For example, if there are six members, each member receives five copies of the work sheet.)
- One copy of Strengths and Needs Work Sheet B for each team member.
- For each team member, enough copies of Strengths and Needs Work Sheet C to equal the number of other members.
- One copy of the Strengths and Needs Sample Planning Chart for each team member.
- A pencil for each team member.
- A clipboard or other portable writing surface for each team member.
A newsprint poster prepared in advance with the following content:

**Guidelines for Receiving Feedback**

- Listen to feedback; do not discount, debate, analyze it.
- If you don’t understand, ask for clarification/examples.
- Paraphrase feedback. Verify that you heard correctly.
- If you wish, thank the person who gave feedback.
- Masking tape for posting newsprint.

**Session 2**

- Each team member’s poster-sized planning chart (prepared in advance and brought to the session by each member).
- Each team member’s notes about (a) how he or she can capitalize more on personal strengths and likes and (b) what he or she might be able to do about desired changes and about meeting others’ expressed needs (prepared in advance and brought to the session by each member).
- A copy of the Strengths and Needs Action-Planning Guide for each team member plus a supply of extra copies in case the members want them.
- A large supply of blank paper (enough so that each team member can have at least ten sheets if desired).
- A pencil for each team member.
- A clipboard or other portable writing surface for each team member.
- The newsprint poster on guidelines for receiving feedback (prepared for the first session).
- A newsprint flip chart and several colors of felt-tipped markers.
- Masking tape for posting newsprint.

**Physical Setting**

For Session 1, a room with movable chairs placed in a circle. The circle should be close to the wall on which the facilitator plans to display the newsprint poster (see Materials, Session 1).

For Session 2, a room with movable chairs and plenty of wall space for posting newsprint. It is preferable, but not essential, to have a table on which the team members can work to complete their strengths poster (see Process, Session 2, step 10).
Process

Session 1

1. The facilitator explains that the activity will be conducted in two sessions: In the first session the members will give one another feedback about their strengths as team members, educate one another about what they like and what they would like to change on the job, and state what they need from one another; in the second session the members will do action planning based on information shared during the previous session. The facilitator explains that by sharing this information and acting on it, the members can strengthen their team and further its development. (Five minutes.)

2. Each team member is given the appropriate number of copies of Strengths and Needs Work Sheet A, a pencil, and a clipboard or other portable writing surface and is asked to read the instructions on the work sheet. Subsequently, the facilitator reviews the instructions and elicits and answers questions about them. (Five minutes.)

3. Each team member is instructed to complete one copy of the work sheet for every member of the team except himself or herself. (Ten to fifteen minutes.)

4. After all members have completed their copies of work sheet A, the facilitator explains that each team member will take a turn at receiving feedback and that the maximum time each person has for giving feedback is one minute. The facilitator posts the prepared newsprint sheet of guidelines for receiving feedback, reviews these guidelines with the team members, and elicits and answers questions. These guidelines remain posted throughout the session. (Five minutes.)

5. The facilitator asks for a volunteer to receive feedback. (If no team member volunteers, the facilitator selects one and explains that the remaining members will take turns in clockwise order.) After all feedback statements have been read aloud and clarified to the feedback recipient’s satisfaction, the facilitator instructs those who read statements to give their sheets to the feedback recipient. Then the facilitator either asks for another volunteer or selects the person who is next in clockwise order. The feedback procedure is repeated until all members have received feedback.

6. The facilitator distributes copies of Strengths and Needs Work Sheet B and asks the team members to complete this sheet according to the instructions. (Ten minutes.)

7. After the members have completed work sheet B, they are told that they are to take turns reading their work sheets aloud to the team. The facilitator emphasizes that while one member is reading, the others are to listen carefully; afterward the listeners may ask questions for clarification. Then the facilitator asks for a volunteer or selects a team member to begin, and the procedure continues until all members have taken a turn.
8. Each team member is given the appropriate number of copies of Strengths and Needs Work Sheet C and is asked to read the instructions. Then the facilitator reviews the instructions and elicits and answers questions about them. (Five minutes.)

9. The facilitator instructs each team member to complete one copy of the work sheet for every member of the team except himself or herself. (Fifteen to twenty minutes.)

10. After all members have completed their copies of work sheet C, the facilitator explains that each team member will take a turn at receiving feedback about what the other members need from him or her and that the maximum time each person has for giving feedback is one minute. The facilitator then reminds the team members of the posted guidelines for receiving feedback. (Five minutes.)

11. The facilitator asks for a volunteer to receive feedback. (If no team member volunteers, the facilitator selects one and asks that the remaining members take their turns in clockwise order.) After all feedback statements have been read aloud and clarified to the feedback recipient’s satisfaction, the facilitator instructs those who read statements to give their sheets to the feedback recipient. Then the facilitator either asks for a second volunteer or selects the person who is next in clockwise order. This procedure is repeated until all team members have received feedback. (Note: This step can produce a great deal of affect, so the facilitator needs to be prepared to intervene appropriately.)

12. The facilitator leads a discussion based on these questions:
   - How did you feel when you gave feedback to your fellow team members? How did you feel when you received feedback?
   - What did you discover about what your fellow team members like on the job? What did you discover about what they would change?
   - What strengths are represented in this team? How do those strengths benefit the team? How do they benefit the organization?
   - How is it beneficial for team members to talk about what they like on the job, what they would change, and what they need from one another?
   - What have you learned about yourself as a member of this team?
   - What have you learned about your fellow team members that helps you understand better what you need from them?
   - What have you learned about the feedback process?
   - What have you learned about the connection among people’s strengths, what they like on the job, what they would change, and what others need from them?
   - How can you use what you have learned to enhance the productivity or cohesiveness of the team?
13. The facilitator makes arrangements for the second session, again explaining that the purpose of that session is to do action planning based on the information just shared. The facilitator gives each team member a copy of the Strengths and Needs Sample Planning Chart; explains that the chart offers a way to display information from completed copies of work sheets A, B, and C; and asks each member to prepare a similar chart in poster (newsprint) size for the action-planning session. In addition, each member is instructed to spend some time thinking and making notes about (a) how he or she can capitalize more on personal strengths and likes and (b) what he or she might be able to do about desired changes and about meeting others’ expressed needs. The facilitator emphasizes that each member is to bring the prepared planning chart and the notes to the action-planning session.

Session 2: Action Planning
1. The facilitator asks each team member to post his or her poster-sized planning chart.
2. The facilitator displays the newsprint poster on guidelines for receiving feedback and reviews the content with the team members, urging them to follow these guidelines during the session. This poster remains on display throughout the session. (Five minutes.)
3. The facilitator distributes blank paper, pencils, and clipboards or other portable writing surfaces. The team members are instructed to circulate around the room, reading one another’s planning charts. The facilitator encourages the members to jot down notes about agreements they would like to make with one another and any other ideas that occur to them. (Twenty to thirty minutes.)
4. The facilitator reassembles the team and invites the members to share their reactions and the contents of their notes. As ideas are expressed, the facilitator records highlights on newsprint, posts the newsprint, and displays it for the remainder of the session. (Fifteen to twenty minutes.)
5. The facilitator leads a brief discussion about patterns, similarities, and differences in the planning charts and the implications for the team. (Ten minutes.)
6. The team members are asked to spend ten minutes making arrangements to meet with one another during the next hour for the purpose of making agreements and planning whatever action they wish. (Ten minutes.)
7. The facilitator gives each team member a copy of the Strengths and Needs Action-Planning Guide and several sheets of blank paper, announcing that extra copies of the guide and extra blank paper are available if the members need them. The facilitator briefly reviews the action-planning steps, explaining how they fit into the action-planning process, and ensures that the members understand the procedure they are to follow with their partners. (Ten minutes.)
8. The facilitator instructs the team members to spend the next hour meeting with partners to make agreements and to plan action. As the members work, the facilitator
monitors their activity, announces the remaining time at intervals, and provides assistance if needed. (One hour.)

9. The facilitator announces the end of the planning time, reassembles the total team, and encourages the members to make arrangements later to do any planning that they did not have time to complete during the session. The members are invited to share some of their one-sentence summaries of the agreements they have reached. As they share, the facilitator records highlights on newsprint. (Ten minutes.)

10. The facilitator gives the team members a sheet of newsprint and several different colors of felt-tipped markers and asks them to make a poster that celebrates the strengths of their team. (Ten to fifteen minutes.)

11. After the poster has been completed, the facilitator posts it and invites the team members to share their reactions to making the poster. Afterward the facilitator congratulates the members on their work during the two sessions and encourages them to keep their poster and to display it in their usual meeting room or elsewhere to remind them of the strengths in the team.

Variations

- The entire activity may be completed as a one-day team-building intervention. In this case one of two approaches may be taken after Session 1, step 12: (a) The homework assignments from step 13 may be omitted, and the team members may be asked to work from their completed handouts; or (b) the facilitator may ask the team members to complete the homework assignments in the team setting and then proceed with action planning. Because either of these two alternatives increases the time required for Session 2, the facilitator may want to omit step 5 from Session 2 and make any other time adjustments necessary.

- The facilitator or the team leader may collect all completed work sheets, create a planning chart for each team member, assemble the resulting charts into a handout, and distribute copies of the handout for use during Session 2.

- With a team in which some trust has already been built through team-building activities, this activity may be shortened by using only work sheets A and C. With a team in which no team-building activities have been used, this activity may be shortened by using only work sheets A and B.

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Submitted by Terri Burchett.
STRENGTHS AND NEEDS WORK SHEET A

Instructions: Fill out one of these sheets for every other member of your team. Write your name in the “From” blank and the name of the person who is to receive the feedback in the “To” blank. Then spend a couple of minutes writing a brief but specific completion to the statement that follows. Use only the space provided; do not write lengthy paragraphs. Give examples if they would be helpful in explaining what you mean.

Later you will read your statement aloud, clarify your meaning if asked, and then give this sheet to the person.

Here are two sample statements:

- **An area of strength that you bring to the team is your willingness to help any coworker who needs it.** I really appreciated it when you offered to help me proofread the minutes of the department meeting last week, and Alice told me she was grateful when you volunteered to make copies of those minutes.

- **An area of strength that you bring to the team is your writing ability.** When any of us can’t find the right word to use in a letter or report, we can turn to you for suggestions.

From _____________________________

To _____________________________

An area of strength that you bring to the team is:
Instructions: Consider the different aspects of your job: task assignments, relationships with coworkers, equipment, systems, procedures, policies, and so on. Then read and complete the following statements, being as specific as you can but using only the space provided.

When you are considering what you like about your job, think about what you find satisfying, motivating, or challenging in a positive sense.

When you are considering what you would like to change, think about what you find dissatisfying, demotivating, or stressful.

Later you will read this sheet aloud, clarifying your meaning if asked.

Here are two sample statements:

- **What I like about my job is** (1) the large variety of tasks, (2) flexible hours, (3) long-term projects that I can be in charge of and really sink my teeth into, and (4) the opportunity to be mentored by people I respect and admire.

- **What I would like to change about my job is** (1) the amount of time I spend making copies at the copying machine, (2) the frantic pace at deadline time, (3) the lack of privacy and the noise in my office, and (4) the unreliable phone system.

What I like about my job is:

What I would like to change about my job is:
**STRENGTHS AND NEEDS WORK SHEET C**

*Instructions:* Fill out one of these sheets for every other team member. Write your name in the “From” blank and the name of the person who is to receive the feedback in the “To” blank. Then spend a couple of minutes completing the statement that follows.

Be specific in describing how you would like the person to act and under what circumstances, but do not write lengthy paragraphs; use only the space provided. If you wish, you may explain why you need what you are asking for and/or how the person would benefit by giving you what you need.

Later you will read your statement aloud, clarify your meaning if asked, and then give this sheet to the person.

Here are two sample statements:

- **What I need most from you is** to get me the new-product descriptions three weeks before the deadline for advertising copy instead of only a week before. Having three weeks to write the copy would mean I wouldn’t have to drop everything and race to meet the deadline.

- **What I need most from you is** to give me some space when you see that I’m upset. It usually takes me at least fifteen minutes to calm down enough to talk about what’s bothering me. After some cooling-off time I can be more appreciative of your comments and your concern.

From ___________________________

To _____________________________

What I need most from you is:
### STRENGTHS AND NEEDS SAMPLE PLANNING CHART

**CHRIS**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Likes</th>
<th>Desired Changes</th>
<th>Others’ Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Writing ability</td>
<td>Variety of tasks</td>
<td>Too much time spent at copying machine</td>
<td>Submit monthly reports sooner (Fred)</td>
</tr>
<tr>
<td>Cheerful disposition</td>
<td>Flexible hours</td>
<td>Frantic pace at deadline time</td>
<td>Keep voice down when talking on phone (Karen)</td>
</tr>
<tr>
<td>Willingness to help</td>
<td>Long-term projects</td>
<td>Lack of privacy and noise in office</td>
<td>Give more feedback (Lee)</td>
</tr>
<tr>
<td>Understanding of statistics</td>
<td>Being mentored</td>
<td>Unreliable phone system</td>
<td>Assist in writing product descriptions (Dale)</td>
</tr>
<tr>
<td>Knowledge of company procedures</td>
<td></td>
<td></td>
<td>Devise a handout on customer-service guidelines (Pat)</td>
</tr>
</tbody>
</table>
STRENGTHS AND NEEDS ACTION-PLANNING GUIDE

Action-Planning Steps
1. Define current situation.
2. Define desired change.
3. Describe how success will look or feel.
4. List steps to take.
5. Decide who will take steps.
7. List names of people who might help, provide resources, approve action.
8. Decide who will seek help, resources, approval.
9. Determine a deadline for each step.
10. Arrange to meet periodically to assess progress.

Procedure to Follow with Your Partner
1. Share ideas and suggestions.
2. Plan action.
3. Get feedback from each other about whether planned action would meet needs.
4. Negotiate as necessary.
5. Come to agreement about action to be taken.
6. Use any or all of the above action-planning steps, jotting down whatever information seems pertinent.
7. Summarize what you plan to do in a single sentence.
TEAM BUILDING: A FEEDBACK EXPERIENCE

Goals

- To help the team members to diagnose their team’s functioning.
- To establish a cooperative expectation among the team members.
- To assist the team in developing norms of openness, trust, and interdependence.
- To help the team members to clarify and evaluate their personal goals, the team’s goals, and the relationship between these two sets of aims.

Group Size

All members of an ongoing team.

Time Required

A minimum of one day. (The time required varies according to the depth of the intervention. The example described here requires three days, one for prework and two for the team-building meeting itself.)

Materials

- Enough copies of the Team Building Sensing Interview Guide to accommodate all of the team members. (The facilitator uses one copy for each interview conducted.)
- A newsprint flip chart and a felt-tipped marker.

Physical Setting

A private room with wall space for posting.

Process

1. Phase 1: Sensing. Prior to the team-building meeting, the facilitator interviews each of the team members privately. The facilitator tells each member what the purpose of the interview is, what the limits of confidentiality are, and what he or she is going to do with the interview data. The sensing interview guide (or an adaptation of this guide) is used in these interviews.

2. Phase 2: Data Analysis. The interview data are analyzed by the facilitator. He or she notes common themes running through the responses of team members. The facilitator prepares a series of newsprint posters from the data: a poster of data pertaining to each team member, a poster containing data on the team’s process (decision-making patterns, communication phenomena, etc.), a poster displaying
goal statements, a poster of team-building meeting objectives, and a poster representing any other groupings of data that emerge from the analysis.

3. **Phase 3: Team Building.** The team assembles in a room that has a minimum of outside interruptions. The facilitator explains the goals of the two-day meeting; posts the meeting objectives; and then posts all the rest of the interview data, explaining his or her analysis. (The facilitator may wish to display the posters one at a time, entertaining clarifying questions on each.) The facilitator spends the rest of the meeting facilitating the team’s working on the posted data—reinforcing openness, risk taking, trust, and interdependence. He or she may suggest a confrontation between the formal team leader and the rest of the members but is careful to help the leader learn how to give and receive feedback nondefensively. The facilitator helps the team members learn how to observe group process. Decisions made by the team are written on newsprint and posted. The facilitator may urge members to develop contracts with one another for follow-up.

**Variations**

- A variation on the sensing strategy described in Phase 1 is the **sensing meeting**. The team leader calls a team meeting to gather data and chairs the meeting, soliciting data and writing the information on newsprint. The facilitator helps the leader to listen, avoid reacting defensively, and record the data. The leader then commits himself or herself to a definite course of action (a series of meetings with the team) to deal with the data.

- The analysis can be carried out with the assistance of a colleague and/or the leader. (The facilitator needs to be sensitive to the credibility of the outcomes, however.)

- Instead of displaying posters, the facilitator can distribute copies of his or her analysis to the team members.
# TEAM BUILDING: SENSING INTERVIEW GUIDE

<table>
<thead>
<tr>
<th>Name ______________________</th>
<th>Interviewer ______________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date ________________________</td>
<td>Time _____________ to _____________</td>
</tr>
<tr>
<td>Format: Face to Face ________ (or) By Phone ________ Place __________</td>
<td></td>
</tr>
</tbody>
</table>

1. Title(s) of interviewee ______________________________________________

2. Satisfaction with the team’s current functioning __________________________
   ___________________________________________________________________

3. Goals of the team __________________________________________________
   ___________________________________________________________________

4. Personal goals_____________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

5. How decisions are made_____________________________________________
   ___________________________________________________________________

6. Problems of the team right now _______________________________________
   ___________________________________________________________________
   ___________________________________________________________________

7. Personal problems related to the team right now _________________________
   ___________________________________________________________________
   ___________________________________________________________________

8. Action strategies needed right now _____________________________
   ___________________________________________________________________

9. Feelings about the team-building meeting _____________________________
   ___________________________________________________________________
10. Relationship with other team member (give first names and titles, for example, manager/leader/chair/supervisor)

A. ____________________________________________________________
B. ____________________________________________________________
C. ____________________________________________________________
D. ____________________________________________________________
E. ____________________________________________________________
F. ____________________________________________________________
G. ____________________________________________________________
H. ____________________________________________________________
I. ____________________________________________________________
J. ____________________________________________________________
K. ____________________________________________________________
L. ____________________________________________________________

11. Other comments ________________________________________________
THE HELPING HAND: SUPPORTING TEAMMATES’ GOALS

Goals
- To offer members of an intact team an opportunity to gain the support of their teammates in achieving goals.
- To offer members of an intact team an opportunity to offer feedback about one another’s strengths.
- To offer participants a chance to state their own perceived strengths.

Group Size
All members of an intact work team.

Time Required
Forty-five minutes to one hour, depending on the size of the team.

Materials
- One copy of The Helping Hand Outline for each participant.
- Several sheets of blank paper and a pencil for each participant.

Physical Setting
Any room in which the participants can be seated comfortably. If tables are not available, portable writing surfaces should be provided.

Process
1. The facilitator announces that the participants are about to take part in an activity through which they can identify goals that they see for themselves as well as the strengths they bring.
2. The facilitator gives each participant a copy of The Helping Hand Outline, several sheets of blank paper, and a pencil. The facilitator asks each participant to use the “Goals/Challenges” section of the handout to write down one or more personal challenges or goals that he or she wants to address in the next few months. These challenges or goals should be ones that he or she is willing to share with the other participants. (Five minutes.)
3. The facilitator gives the following instructions:
   “Each of you in turn will share aloud his or her goals or challenges. As you share, your teammates will make notes for themselves about the qualities and strengths that
you have that will help you to achieve these objectives. Be sure to use the blank paper for your notes about your teammates.”

4. Each participant in turn shares his or her personal goals or challenges as the other participants listen and take notes. The facilitator allows time between participants for the other participants to complete their notes. (Ten to fifteen minutes.)

5. After all participants have shared, they are given the following instructions:
   “On the upper portion of your copy of The Helping Hand Outline, trace your own hand. Leave your own copy of the outline at your place. Take the notes that you have written about your teammates and go around to each person’s hand outline. Within that person’s hand outline itself, write down the strengths you have observed about that person.”
   (Ten to fifteen minutes.)

6. When all participants have finished, the facilitator invites them to take their places and read the comments that their teammates have noted. Each participant is asked to share one or more of the comments with the group as a whole. (Ten minutes.)

7. The facilitator leads a discussion of how the strengths that have been identified can help to meet the opportunities and challenges that lie ahead. He or she might prompt discussion with questions such as the following:
   ■ How did you feel when you shared a personal challenge or goal with your teammates?
   ■ How did it feel to read the comments that your teammates noted about you?
   ■ What have you learned about team support in achieving personal goals?
   ■ How can you use the support of your teammates as “helping hands” along your path?
   (Ten to fifteen minutes.)

Variations

■ Members of an intact work team can use this process to identify challenges for the team and the strengths that each member adds to the team.

■ In a full-fledged feedback session, a second hand could be drawn and areas of growth listed.

■ Members can focus on individual goals or challenges that they face in the team.

Submitted by Kathleen Kreis.
THE HELPING HAND OUTLINE

Goals/Challenges:

---
COMFORT ZONES: ESTABLISHING TEAM NORMS

Goals

- To foster effective team performance.
- To acquaint team members with the concept of norms.
- To provide an opportunity to establish the practice of explicitly discussing not only how things should be done in the team but also how things actually are done.
- To provide team members with a relatively low-risk opportunity for self-disclosure.
- To foster interpersonal communication in the team.

Group Size

All members (at least three and no more than ten) of an ongoing work team, a task force, or a project team. This activity is best used with a newly formed team, an ongoing team that is experiencing difficulties in interpersonal relations, or a team that is becoming self-directed.

Time Required

Two to three and one-half hours, depending on the number of team members and the depth of discussion following each norm.

Materials

- A copy of the Comfort Zones Work Sheet for each participant.
- A pencil for each participant.
- A clipboard or other portable writing surface for each participant.
- Newsprint poster sheets patterned after Figure 1, prepared in advance by the facilitator.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.
# TEAM NORMS SUMMARY

## GOALS AND OBJECTIVES

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Reactions:

## OPENNESS

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Reactions:

## CONFLICT RESOLUTION

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Reactions:

(Continue this format for the remaining norms.)

Figure 1. Team Norms Summary Poster Format
Physical Setting

Any room in which the participants can work comfortably. It is preferable that the participants be able to see one another as well as the facilitator and the newsprint posters.

Process

1. The facilitator introduces the activity to the participants with comments such as the following:

“Virginia Satir (1967), who has done extensive work with families, states that every individual grows up with unspoken assumptions and rules learned from parents about how families should operate and what family life should be like. Similarly, individuals, in their roles as workers, develop unspoken assumptions and rules about work life—and particularly about the life of the work “family,” the team—from past work experiences and, ultimately, from family-of-origin experience.

“If the members of a team do not talk about their assumptions and if those assumptions differ, the team members inadvertently violate one another’s expectations. Teamwork, satisfaction, and productivity can suffer. Consequently, it is a good idea to develop team “norms,” which are rules about what constitutes normal or acceptable behavior for team members. When everyone in the team makes similar assumptions (shares the same norms), team-member interactions tend to be smoother.

“The activity that you are about to participate in is designed to help you and your fellow members enhance your functioning as a team by developing an understanding of everyone’s assumptions, agreeing on which of those assumptions will govern behavior in your team, and declaring those assumptions to be your team’s norms.”

(Five minutes.)

2. The facilitator distributes copies of the Comfort Zones Work Sheet, pencils, and clipboards or other portable writing surfaces; reads the instructions on the work sheet aloud; answers any questions about the task; and then asks the participants to complete the work sheets on their own. (Ten to fifteen minutes.)

3. The facilitator displays the newsprint posters patterned after Figure 1 and asks one of the participants for the number of his or her comfort zone for the first norm, Goals and Objectives. After writing an “X” in the appropriate box on the poster, the facilitator asks the participant to read what he or she wrote concerning reactions that occur when others operate outside his or her comfort zone. As the participant reads, the facilitator records key words or phrases on the poster.

4. The procedure described in Step 3 is repeated until the facilitator has recorded all participants’ information for the first norm. (Five to ten minutes for Steps 3 and 4.)

5. The facilitator leads a discussion about the following:
A summary of the reactions that occur when teammates operate outside one another’s comfort zones. (This discussion should be nonjudgmental: Everyone has a right to his or her feelings. If people have differing expectations of one another, they need to develop ways to work together so that all of their needs are met as much as possible.)

The implications that this pattern of comfort zones has for the team. (The pattern is intended as a starting point for discussion. In general, a team whose members have similar zones will have an easier time dealing with the issues involving a particular norm, whereas a team whose members have widely scattered comfort zones will have more work to do in terms of understanding and appreciating differences. Also important to note is a situation in which the leader or another key member has a comfort zone that is quite different from the zones of the other members.)

The facilitator assists the participants in establishing a team norm (in terms of behaviors that the participants will/will not engage in) for the first item, and the norm is recorded on newsprint. If there is wide divergence in comfort zones, the participants may need some help with conflict management during this step. During this discussion the facilitator should focus on helping the participants to make “I statements” about their feelings, to make clear requests of one another, and to respect differences within the team. (Ten to twenty minutes.)

6. The facilitator asks the participants to select four more norms to concentrate on during the session, explaining that the remaining ten norms on the Comfort Zones Work Sheet will be addressed in subsequent team meetings.

7. The process described in Steps 3, 4, and 5 is repeated four times to establish team norms for the four selected items. (One to two hours.)

8. The facilitator reviews the five team norms established by the participants. The newsprint sheet listing these recorded norms is given to one of the participants to reproduce and distribute to all participants in handout form. (Ten minutes.)

9. The facilitator leads a discussion by asking the following questions:

   - How do you feel about the norms established by the team thus far?
   - How do you feel about the process by which you arrived at these norms?
   - What have you learned about norms? What have you learned about establishing team norms?
   - How will you monitor adherence to the norms you establish? How will you address norm “violations”? What process will you set up to review norms from time to time (when new members join the team, when the team’s mission or assignments change radically, and so on)?

   (Fifteen minutes.)
10. The facilitator assists the participants in making arrangements for future sessions at which they will review the ten remaining items on the Comfort Zones Work Sheet and establish norms for those items. (The facilitator’s presence at future sessions is helpful but not essential.)

**Variations**

- To shorten the time required and proceed directly to the activity’s focus, the facilitator may collect the completed work sheets, ask the participants to take a break, and spend the break time charting the results. After the break the facilitator should return the work sheets to their owners so that the participants can take notes.

- The activity may be extended into a full-day intervention by helping the participants to establish norms for all fifteen items on the Comfort Zones Work Sheet.

- Although this activity addresses key norms, it does not deal with all areas in which a team might want to establish norms. Therefore, at some point the participants may consider what other issues or behaviors would be useful to clarify and may make arrangements to establish norms about these issues or behaviors. In this case the facilitator should elicit the participants’ suggestions, record them on newsprint, make arrangements for a session to address these issues or behaviors, and give the newsprint to one of the participants to keep and bring to the future session.

- The activity may be followed with a lecturette and discussion about the norms that characterize high-performance teams. See, for example, Isgar (1989).

- The activity may be used in connection with diversity training. In this case the facilitator should emphasize the point that people enter the workplace with different assumptions about work life.

- The Comfort Zones Work Sheet may be used to evaluate how the participants actually behave in terms of established norms. Such evaluation may be done as a separate activity or in conjunction with this activity.

**REFERENCES**


COMFORT ZONES WORK SHEET

Norms are standards of behavior that each member of a team is expected to follow. They reflect the team’s values about work.

Following is a list of fifteen topics or behavioral areas about which teams develop norms. Each topic on the list includes a continuum with a brief description of possible norms at opposite ends. For each of these topics, everyone has a “comfort zone” that represents the level of behavior in a team that is the most helpful to that person in terms of getting work done.

Consider each topic on this work sheet and follow these instructions:

- Circle the number that best describes your own personal “comfort zone.”
- In the space below each continuum, write a few words about the reactions you have when other members of your team function outside your comfort zone for that behavioral area.

GOALS AND OBJECTIVES

All goals and objectives should be determined from above. All goals and objectives should be determined by team consensus.

1  2  3  4  5  6  7

Reactions:

OPENNESS

People should “stick to the facts.” Focus should be strictly business; talking about feelings is not appropriate. People should talk a lot about personal issues and feelings and should often disclose parts of their lives outside work.

1  2  3  4  5  6  7

Reactions:
### CONFLICT RESOLUTION

It is always best to avoid conflict at any cost.  
It is always best to confront every conflict openly and work it through.

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Reactions:

### ORIENTATION TO HIERARCHY

Hierarchy helps; people should always go through the boss.  
Working as a team of peers helps; people should go ahead and do it and then—maybe—tell the boss.

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Reactions:

### MUTUAL SUPPORT

I am at my best when I am working on my own  
I am at my best when people rely on one another.

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Reactions:

### REPORTING WITHIN THE TEAM

Only the headlines should be reported.  
Hands-on detail should be reported.

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### PROBLEM SOLVING/DECISION MAKING

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*Reactions:*

### LEADERSHIP

In the final analysis, one person should lead.  
Leadership roles should be shared.

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*Reactions:*

### EXPERIMENTATION/CREATIVITY

People should use the regular, tried-and-true ways.  
People should make a habit of trying anything new, no matter how unusual or different.

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*Reactions:*

### CONTROL AND PROCEDURES

People should always follow established procedures to get work done.  
People should bypass established procedures whenever possible to get work done.

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*Reactions:*
SELF-EVALUATION

The team should never evaluate its functioning or process. 

The team should frequently evaluate its functioning and process.

Reactions:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

WORKING OVERTIME

People should finish their work during regular hours; having to work overtime means that work has not been scheduled properly.

People should work a lot of overtime; working overtime shows dedication, loyalty, and professionalism.

Reactions:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

MEMBER WHO DOES NOT PULL HIS OR HER WEIGHT

A member who does not pull his or her weight should be transferred or fired so that the team is not damaged further.

A member who does not pull his or her weight should be coached and/or retrained, no matter how much of the team’s time and energy is required.

Reactions:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
### NURTURING/RENEWAL

Nurturing the team wastes productive time.  

The team frequently makes time to nurture itself.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

*Reactions:*

### INDIVIDUAL RECOGNITION

Recognition should be public and highly visible.  

Recognition should be quiet, private, low-key.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

*Reactions:*
THIS AND THAT:
IMPROVING TEAM PERFORMANCE

Goals

- To help team members identify opportunities for improvement in their team’s performance.
- To assist team members in establishing and communicating their expectations of one another.

Group Size

All members of an ongoing work team, divided into subgroups of three to four members each.

Time Required

Approximately one hour and ten minutes.

Materials

- A newsprint poster prepared in advance with the following statement: “A group does not instantly transform into an effective team. The transformation is a gradual, continual process that involves becoming more of this and less of that.”
- A newsprint flip chart and a felt-tipped marker for each subgroup and for the facilitator.
- Masking tape for posting newsprint.

Physical Setting

A room large enough for each subgroup to work without disturbing the others. Movable chairs should be provided. Plenty of wall space must be available for posting newsprint.

Process

1. The facilitator announces the goals of the activity.
2. The newsprint poster is displayed and read aloud. The facilitator defines “this” as the positive behaviors necessary for effective teamwork and “that” as the negative behaviors that prevent effective teamwork.
3. The facilitator divides the team into subgroups of three to four members each. Each subgroup is given a newsprint flip chart, a felt-tipped marker, and masking tape for posting newsprint.
4. Each subgroup is asked to label a newsprint sheet (and any subsequent sheets used) with the heading “More of This.” The facilitator explains that the subgroups are to brainstorm behaviors that the team needs to increase in order to improve its performance; that each subgroup should choose a recorder to write down the members’ ideas; and that all filled sheets are to be posted. Then the subgroups are told to begin. While they are working, the facilitator monitors their progress. If they have difficulty getting started, the facilitator suggests that they consider issues such as communication, trust, commitment, goals, morale, quality of work, and procedures and processes. (Five to ten minutes.)

5. After the subgroups have finished brainstorming, the facilitator asks them to review their posted newsprint and to convert any attitudes or values into behaviors (actions that the team members can take). The facilitator also states that any unreadable newsprint sheets be recopied, the old sheets removed, and the new sheets posted. (Five minutes.)

6. Each subgroup is instructed to label another newsprint sheet (and any subsequent sheets needed) with the heading “Less of That,” to brainstorm behaviors that the team needs to decrease in order to improve its performance, and to post all filled sheets. (Five minutes.)

7. After brainstorming, the subgroups review their posted newsprint; convert attitudes or values into behaviors; and, if necessary, recopy the final items onto new sheets of newsprint, remove the old sheets, and post the new ones. (Five minutes.)

8. After all the final lists have been posted, the facilitator asks the team members to walk around and review the work of other subgroups. (Five minutes.)

9. The facilitator draws a vertical line down the center of a sheet of newsprint and labels the left column “THIS” and the right column “THAT.” Then the facilitator leads the team in identifying the items that consistently appeared on the subgroups’ lists and writes these recurring items in the appropriate columns. Each filled sheet of newsprint is posted. (Ten minutes.)

10. The facilitator leads a discussion with questions such as the following:
   
   - Which column was easier to fill? Why?
   - What would be the result if the team demonstrated more of “this”? What would be the result if the team demonstrated less of “that”?
   - What personal changes do you need to make so that the team can demonstrate more of “this”? What changes do you need to make in order for the team to demonstrate less of “that”?
   - Which of the listed items are most important? Which need to be implemented first to ensure that the team’s performance will improve?

   (Twenty minutes.)
11. A volunteer takes responsibility for:

- Reproducing the newsprint lists of “THIS” and “THAT” completed in Step 9 and ensuring that each member receives a copy; and
- Posting these lists in the team’s regular meeting room.

Arrangements are made to review the team’s progress in a few weeks.

**Variations**

- If the team has fewer than six members, the activity may be conducted without subgroups.
- The final lists of “This” and “That” may be used for planning further team-building activities.
- The participants may be asked to prioritize the items on the final lists.
- The participants may develop a survey from items on the final lists. A Likert-type scale will help determine the extent to which the behaviors are exhibited by the team. Then the survey may be repeated after six months or a year and the results compared to those from this session.
- The participants may be asked to develop specific performance standards for each item on the “This” list.

Submitted by James W. Kinneer.
TEAMSCORES: MEASURING AND COMMUNICATING PERFORMANCE

Goals
- To help team members identify measures of team effectiveness that are important to their team and the organization.
- To encourage team members to develop a means for assessing and reporting measures of the team’s effectiveness.
- To provide a means for team members to keep track of the team’s effectiveness.

Group Size
All members of an ongoing team.

Time Required
One and one-half to three hours, depending on the size and complexity of the team.

Materials
- A copy of the TeamScores Work Sheet for each team member.
- A pencil for each team member.
- A newsprint poster of Figure 1, prepared ahead of time by the facilitator. Note: More than one poster may be required.
- A newsprint poster of Figure 2, prepared ahead of time by the facilitator.
- A newsprint flip chart and several felt-tipped markers.
- Masking tape for posting newsprint.

Physical Setting
A quiet room in which the team members can work without being interrupted. A table and chairs should be provided.

Process
1. The facilitator introduces the activity as a way for the team members to assess the strengths of their team as well as the areas in which it can improve. The facilitator stresses that this kind of assessment is essential; without the feedback it provides, the members cannot know exactly what progress they have made, what they have done well, and where they need to exert more effort. The facilitator also states that
### Figure 1. Columns for Identifying and Categorizing Performance Measures

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<th>Performance Measures</th>
<th>Important to Team</th>
<th>Important to Organization</th>
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### Figure 2. Matrix for Identifying Importance of Performance Measures

- **A**: High Importance to Organization; High Importance to Team
- **B**: High Importance to Organization; Low Importance to Team
- **C**: Low Importance to Organization; High Importance to Team
- **D**: Low Importance to Organization; Low Importance to Team

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<th>Importance to Organization</th>
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such feedback on performance is largely responsible for the team members’
motivation. (Five minutes.)

2. The facilitator states that the appropriate measures of a team’s performance depend
on the nature of the team, its functions, and its contribution to the organization. After
displaying the newsprint poster of Figure 1, the facilitator asks the members to
contribute ideas about performance measures (elements of team functioning or
effectiveness) that are important to their team and/or their organization. The
facilitator cites examples, saying that they may or may not apply: cost reduction,
reduced downtime, yield, speed, accuracy, productivity, and safety. As the members
suggest measures, the facilitator records them, asks whether they are important to the
team and/or to the organization, and puts check marks in the appropriate columns. If
the members contest a measure, the facilitator asks them to defer that discussion
until later. (Ten minutes.)

3. When the measures have been listed, the facilitator displays the newsprint poster of
Figure 2 next to the poster(s) of Figure 1. The team members are asked to rate each
measure as either high or low in importance to the team and to the organization.
(Consensus is not necessary, as long as general agreement is reached. If there is a lot
of contention about a measure, however, the facilitator may want to suggest
assigning it to quadrant D.) As the team members make their decisions, the
facilitator records each measure in the appropriate box on the matrix. (Ten minutes.)

4. The facilitator clarifies the implications of the completed matrix:
“The measures in quadrant A are the most important to both your organization and
your team and should receive the most attention from you. The measures in quadrant
D are the opposite: They are the least important to the organization and the team and
should receive the least of your attention. You will need to do further analysis of
quadrants B and C to determine just how much attention they warrant.”

5. Each member receives a copy of the TeamScores Work Sheet and a pencil. In
addition, the facilitator gives the team a newsprint flip chart and several felt-tipped
markers. The members are asked to discuss the work-sheet questions and to record
their answers on newsprint. As they work, the facilitator serves as a process advisor.
(One-half hour to two hours, depending on the needs of the team. Although the
timing is somewhat flexible, the activity works best if the facilitator and the team
members agree on approximately how much time will be spent on this step.)

6. At the end of the allotted time, the facilitator asks the team members to report their
responses to the questions. If the team members desire more time to refine and
finalize their responses, the facilitator assists them in making arrangements to do so.
(Ten to fifteen minutes.)

7. The facilitator leads a concluding discussion with questions such as the following:
- What have you learned about the value of identifying and developing measures to
  assess team performance? About the value of tracking team performance?
- How do you feel about the plans you have made and the responsibilities you have assumed?
- What do you think might be the outcomes of this work? What might be some side benefits of this process?
- How can you continue and reinforce what you have started here?

(Ten to fifteen minutes.)

**Variations**

- Depending on the maturity of the team members, the team’s stage of development, and time constraints, more than one session may be planned to address all of the questions on the work sheet.
- The activity may be used with more than one team from the same organization as a means of developing intergroup communication and information sharing.
TEAMSCORES WORK SHEET

Instructions: As you and the other team members discuss the following questions, make notes on this work sheet. Once you have agreed on a response for an item, one of you should write that response on newsprint.

1. Are there additional “A” measures that should be included in the assessment of your team’s performance? Any additional “B” or “C” measures that should be included?

2. Are any measures in quadrant D of so little importance that you should discuss them with others in the organization to determine whether they can be eliminated?

3. How will you use the measures you identified to assess your team’s performance? What performance standards or criteria will you use?

4. What can serve as your team’s “scoreboard”—a visual reminder of how the team is performing in relation to these measures?

5. What information related to the measures will be included on the team’s scoreboard? (For example, how will you acknowledge exceptional performance, feedback from top management, and so on?)
6. How will the information on the scoreboard be generated or obtained? Who will have responsibility for what?

7. How will the scoreboard information be communicated to others outside the team?

   Performance Measure       How It May Be Communicated

8. How will the team designate responsibility for updating the scoreboard? Will this responsibility be rotating or fixed? Who will be responsible for what time period?

9. How can the material on the scoreboard be kept current, accurate, and most useful to you? How often will it be updated?
CONFLICT MANAGEMENT:
DEVELOPING A PROCEDURE

Goals
- To acquaint the team members with some guidelines for resolving a conflict with another person by giving useful feedback.
- To help the team members to develop their own procedure for managing conflict.

Team Size
All members of an ongoing team, assembled into subgroups of two or three members each.

Time Required
One hour and forty minutes to two hours and fifteen minutes.

Materials
- A copy of the Conflict Management Suggestion Sheet for each team member.
- Blank paper and a pencil for each team member.
- A newsprint flip chart and a felt-tipped marker for each subgroup.
- Masking tape for posting newsprint.

Physical Setting
A room with movable chairs for the team members. If tables are not available for the individual subteams, the facilitator may substitute clipboards or other portable writing surfaces. Plenty of wall space should be available for posting newsprint.

Process
1. The facilitator distributes copies of the Conflict Management Suggestion Sheet and asks the team members to read the sheet. (Ten minutes.)
2. The facilitator reviews the content of the suggestion sheet with the team members, eliciting and answering questions as necessary. (Ten minutes.)
3. The team members are asked to assemble into subgroups of two or three members each. The facilitator distributes blank paper and pencils, gives each subgroup a newsprint flip chart and a felt-tipped marker, and instructs each subgroup to write a set of guidelines for conflict management that their team can use. The facilitator clarifies that the ideas presented in the handout can serve as a useful starting point and that the subgroups may approach this task in any way they wish; for example,
they may borrow ideas from any or all sections of the handout, modify these ideas, write entirely new guidelines, or combine the handout ideas with their own. The facilitator explains that after all subgroups have completed the task, the subgroups will take turns displaying their guidelines on newsprint, presenting these guidelines to the total team, and explaining their reasons for including specific ideas. (Twenty to thirty minutes.)

4. After the subgroups have completed their task, the facilitator reconvenes the total team and asks the subgroups to take turns presenting their guidelines and their reasons for choosing as they did. All displayed newsprint remains posted throughout this step and the next. (Fifteen to twenty minutes.)

5. The facilitator reviews the posted information with the team members and assists them in achieving consensus about which guidelines they want to adopt for their team. Note to the facilitator: Consensus means that all members can at least “live with” each item. Guidelines not accepted consensually will not be used. Aim for fewer guidelines rather than pressuring the team to accept items agreeable only to some people. (Thirty to forty-five minutes.)

6. When the team members have reached consensus, they work together to record the final guidelines on newsprint. Then the facilitator gives the newsprint list to a volunteer to reproduce and distribute to all team members soon after the session. The facilitator also suggests posting a copy in the room where the team usually holds its meetings.

7. Before adjourning, the facilitator asks the following questions:

- It is vital to involve the team members in the writing task because this helps to build their ownership of the guidelines.
- What were your thoughts and reactions as your subgroup was developing guidelines? What were your thoughts and reactions while the total team was working on guidelines?
- Which specific guidelines would have been useful in managing conflicts or disagreements that arose during this activity?
- What differences did you notice between the handout guidelines and the guidelines that your team ultimately adopted? How do you account for those differences?
- What did you learn about managing conflict? What did you learn about developing procedures for a team to use?
- How can you ensure that the guidelines will be used? How can you ensure that they will be evaluated periodically? What obstacles might get in the way of using the guidelines? What might motivate you to use them?

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1 It is vital to involve the team members in the writing task because this helps to build their ownership of the guidelines.
Variations

- The focus may be placed on personal guidelines (what each team member can do) or organizational guidelines (how to handle conflict within the organization).
- At the beginning of the activity, the facilitator may ask the team members to write about the guidelines that appear to be followed (those that are implicit) in the team and the consequences of those guidelines.
- The facilitator may conclude the activity with a role play that demonstrates the use of feedback guidelines and develops a win-win solution.

Submitted by Larry Porter.
CONFLICT MANAGEMENT SUGGESTION SHEET

A Procedure for Managing Conflict

The following procedure has been shown to be helpful in managing conflict in an organizational setting:

1. Do not ignore something that bothers you. Work on the issue involved before the situation becomes intolerable to you. However, if needed, a cooling-off period may be established, with an agreed-on time to deal with the issue later.

2. Talk directly to the other person involved. Work with the other person to try to solve the issue yourselves.

3. If your organization has a human-resource professional on staff, ask that professional for suggestions on how to approach the other person or for suggestions on how to define the issue. Be sure to check back with the professional for feedback or perspectives on the result.

4. If the solution you work out involves a potential change of work procedure, get the approval of your manager before you implement the change.

5. If someone approaches you with an issue, be willing to work on it. You may also wish to seek the help of a human-resource professional in clarifying your point of view.

6. If an individual begins to complain to you about another person who is not present, encourage that individual to talk directly with the other person instead. This approach to handling conflict is much more positive and discourages the perpetuation of rumors, false information, and so on.

7. If, after you have tried to work on the issue on your own with the other person involved—and there has been no change and the conflict still exists—ask for help from a human-resource professional

Things To Keep in Mind Before Working on an Issue

Before you attempt to resolve an issue with another person, consider these suggestions:

1. Be sure that there is a real problem and that you are not just in a bad mood.

2. Try to identify the real issue or opportunity rather than just the symptoms or personalities.

3. Be prepared to work toward a mutually agreeable solution, not just toward “winning.”

4. Remember that it is all right to disagree and that the other person is not “bad” if he or she disagrees with you.

5. Keep some perspective. Relationships are not destroyed but can even be enhanced by working toward a mutually satisfactory solution to a conflict.
Things To Keep in Mind While Working on an Issue

The following reminders may be helpful as you work with another person to resolve an issue:

1. Look for a “win/win” solution: an arrangement whereby both you and the other person involved “win.”
2. Do your best to put yourself in the other person’s shoes.
3. Be willing to “own” part of the problem as belonging to you. (Avoid thinking “That’s not my problem.”)
4. Remember that talking about your feelings is more effective than acting them out.
5. Establish a common goal and stay focused on it.
6. Be persistent in coming to a satisfactory solution if the issue is really important to you.
7. Use the guidelines listed below under “Giving Feedback.”
8. At the end of the discussion with the other person, summarize what has been decided and who will take any next steps.

Giving Feedback

Giving “feedback” is a way of helping another person to consider changing his or her behavior. Feedback is communication to a person that gives that person information about how he or she affects you. Used properly, it can be a helpful “guidance-control” mechanism that the feedback recipient can use in altering his or her behavior.

Here are some guidelines for giving useful feedback:

1. Describe the other person’s behavior; do not judge it. Describe your own reaction to the behavior. Avoid “judging” language so that the other person will feel less defensive.
2. Use specific rather than general terms. Do not say, “You are dominating.” Say instead, “Just now when we were discussing the issue, you didn’t listen to what I said but kept right on talking.”
3. Consider the needs of the other person as well as your own needs. Feedback can be destructive when it serves only the needs of the person who gives it and fails to consider the needs of the person who receives it, such as saying “Shut up and listen” rather than listening to the other person’s question or issue.
4. Discuss behavior that the other person can do something about. Frustration is only increased when a person is reminded of some shortcoming over which he or she has no control (for example, stuttering).
5. Be aware that feedback is more effective when requested than when “dumped.” The person who requests feedback is more likely to appreciate it and consider it carefully than the person who has not requested it.
6. *Give feedback as soon as possible after the behavior has occurred.* Feedback is most useful and has the greatest impact when it follows the behavior in a timely fashion. However, you may sometimes want to wait so that you can calm down, avoid embarrassing the person in front of others, and so on.

7. *Check to make sure that what you have said is clear.* After you have given feedback, ask the other person to try to rephrase what you have said.
AJAX APPLIANCE CORPORATION: EXPLORING CONFLICT-MANAGEMENT STYLES

Goals
- To illustrate various approaches to managing conflict and the ways in which these approaches affect the process of resolving a problem.
- To offer the team members opportunities to practice assigned approaches and to experiment with alternative approaches during role plays involving conflict.

Group Size
All members of an ongoing team. This activity requires a minimum of seven team members, six to conduct the role play and one to serve as observer. If the team has more than seven members, the extras may be designated as extra observers.

Time Required
Approximately two hours.

Materials
- A copy of the Ajax Appliance Corporation Situation Sheet for each team member.
- A copy of the Ajax Appliance Corporation Theory Sheet for each team member.
- One set of Ajax Appliance Corporation Role Sheets A through F (a different sheet for each of six team members).
- A copy of the Ajax Appliance Corporation Observer Sheet 1 for the team member who is to serve as an observer.
- A copy of the Ajax Appliance Corporation Observer Sheet 2 for the team member who is to serve as an observer.
- A pencil for the observer.
- A clipboard or other portable writing surface for the observer.
- Name tags for the team members. Prior to conducting the activity, the facilitator completes six tags with the job titles appearing on the role sheets and the remaining tag(s) with the word “Observer.”

Physical Setting
A room in which the team can conduct the role play in privacy and comfort.
Process

1. The facilitator explains that the team members are to engage in a role play that focuses on conflict and problem resolution.

2. The facilitator distributes copies of the Ajax Appliance Corporation Situation Sheet and asks the team members to read this handout. (Five minutes.)

3. Role sheets are distributed in such a way that each of six team members receives a different sheet; the seventh member receives a copy of the observer sheet, a pencil, and a clipboard or other portable writing surface. In addition, name tags are distributed, and the team members are instructed to wear these tags for the duration of the activity.

4. All team members are instructed to read their handouts, and the role players are asked to spend the next few minutes thinking about how to play their roles. During this time the facilitator instructs the observer in private in a separate area of the room, explaining that the role play is to be conducted in two phases and that a different observer sheet is to be filled out during each phase. (Ten minutes.)

5. The observer returns to the team. The facilitator clarifies the role-play situation as necessary, emphasizes the need for authentic role behavior to simulate reality, and instructs the role players to begin.

6. After twenty minutes the facilitator stops the role play and asks the observer to share observations. (Fifteen minutes.)

7. The facilitator leads a discussion about the first phase of the activity by asking the following questions:
   - How did you feel about playing the role you were assigned? How did you feel about the behavior of the other role players?
   - How closely do your reactions during the role play resemble your typical reactions to conflict at work?
   - How would you describe each role player’s approach to conflict?
   - What were the advantages of each approach? What were the disadvantages? (Fifteen minutes.)

8. Each team member is given a copy of the Ajax Appliance Corporation Theory Sheet and is asked to read this sheet. The facilitator leads a brief discussion about the content of the sheet, relating it to the first phase of the activity. (Twenty minutes.)

9. The team members are instructed to begin the role play again, but with the following difference: Each role player is to try a different conflict-management approach with which he or she would like to experiment, and the role players are not to announce what these new approaches will be. The observer is given a copy of observer sheet 2 and is instructed to answer the questions on this sheet.
10. After twenty minutes the role play is stopped, and the observer is instructed to share observations. (Fifteen minutes.)

11. The facilitator leads a concluding discussion. The following questions are asked:

- Which conflict-management approach did you try this time? How did this approach feel to you? What different reactions did you experience?
- In what ways did your new approach to conflict work better or worse than the approach that you were assigned originally? How did this approach work with the approaches that the others chose?
- How can you account for any differences between the first and second role plays? What do these differences suggest to you?
- What can you conclude about the different conflict-handling approaches? How do your conclusions compare with what the theory sheet suggests? How do they compare with your own experiences with handling conflict in this organization?
- How might you deal with conflict differently in the future? What changes are you willing to try?

**Variations**

- The theory sheet may be presented at the end of the activity so that the team members can choose alternative conflict approaches for the second role play without the benefit of the theory.
- An “ideal” role play of the situation concentrating on resolution may be enacted and discussed in terms of the theory.
AJAX APPLIANCE CORPORATION SITUATION SHEET

You are an employee of the Ajax Appliance Corporation, which manufactures washing machines. For some time now, the company has been suffering because the quality of its products is deteriorating. Recently Consumer Reports listed Ajax’s top-of-the-line washing machine as “unreliable and breakdown prone.” Even some of the appliance stores in your own town, which is the home of Ajax’s main office, have canceled their contracts to carry Ajax products.

A year ago the problem was diagnosed as resulting from inefficiency in the production process. Since that time five consultants specializing in correcting efficiency problems have been retained by the company, but not one of them has been able to help. Three weeks ago Ajax hired a full-time industrial engineer to work solely on this problem. The top management at Ajax has given this engineer six months to correct the inefficiency in production and upgrade the quality of Ajax’s products. If no improvement has been made in six months, the company will close its doors permanently.

The industrial engineer has just called a meeting of key production personnel to discuss how best to approach the task. You are on your way to the meeting now.
AJAX APPLIANCE CORPORATION THEORY SHEET

Five different styles of managing conflict were identified by Thomas and Kilmann (1974):

1. **Competition** indicates a desire to meet one’s own needs and a lack of concern for the needs of the other people involved in the conflict. In employing this style, the competitor uses some form of power, which may be connected with his or her position, rank, expertise, or ability to persuade or coerce.

2. **Collaboration** reflects a desire to meet the needs of all people involved in the conflict, not just one’s own needs. The collaborator is highly assertive, as is the competitor; but, unlike the competitor, the collaborator cooperates with everyone involved so that all needs are acknowledged as important, alternative resolutions and their consequences are identified, and the alternative that meets each person’s goals is chosen and implemented.

3. **Avoidance** reflects a desire to evade the matter at hand. The individual who uses this style does not demonstrate a strong concern for anyone’s needs, including his or her own. This approach is neither assertive nor cooperative.

4. **Accommodation** indicates a willingness to meet the needs of the other people involved at the expense of one’s own needs. Cooperation is the primary behavior manifested with this style; unlike the competitor and the collaborator, the individual who accommodates does not behave assertively.

5. **Compromise** reflects a desire to find a resolution that will partially meet the needs of everyone involved. The individual who approaches conflict with compromise in mind expects the outcome to be mutually acceptable and somewhat satisfying to all of the parties; he or she also expects to give up something in order to achieve a resolution that everyone can live with. This style is both assertive and cooperative, but to a lesser degree than is collaboration.

Each of these styles is appropriate under certain circumstances. Although each of us tends to use one or more particular styles more often than the others, all of us can learn to use all five and can benefit from the availability of a wide range of behaviors in conflict situations.

**REFERENCE**


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AJAX APPLIANCE CORPORATION ROLE SHEET A

Industrial Engineer

You were just graduated from college, and this is your first full-time job. You know that Ajax’s problem is serious, but you have done a lot of research on the subject of plant efficiency and are sure that you have the solution. When you studied Ajax’s plant layout, you realized that it was hopelessly outdated; consequently, you have spent the last two weeks designing a new layout that will eliminate two work stations, save money for Ajax, and streamline the entire operation. You are extremely pleased with your work on this project and you are looking forward to telling the key production personnel about your plan. Although the new layout means that two people will have to be laid off, you are sure that you can convince those attending the meeting that this move will pay off in the long run.

You know that a lot is at stake during this meeting, not just for Ajax but for you as well. If the implementation of the new plant layout succeeds in increasing efficiency and product quality is enhanced—and you are sure that this will be the case—you will be in an excellent position for a promotion. Therefore, you intend to have your way during the meeting, no matter what.

Do not show this role description to anyone.
AJAX APPLIANCE CORPORATION ROLE SHEET B

Plant Manager

You have been an Ajax employee for twenty-three years. You started on the production line and have worked your way up to your present position. You are absolutely convinced that the problems Ajax is experiencing at the moment are attributable to its outmoded production equipment. You personally know all of the plant workers, and they are first rate; but they are struggling to operate old equipment that breaks down frequently and causes them to lose valuable production time. You consider yourself to be an advocate for these workers, and your plan for this meeting is to obtain a commitment from the new industrial engineer to buy the new equipment that is so desperately needed.

You are determined to have your way during the meeting. The plant workers are counting on you, and you refuse to let them down.

Do not show this role description to anyone.
AJAX APPLIANCE CORPORATION ROLE SHEET C

Production Supervisor, First Shift

You have been with Ajax for nine years now. You like your job and you want to keep it. Like most other Ajax employees, you are concerned about the inefficiency in production that seems to have led to lower product quality. However, you have been unable to figure out a solution to the problem. You are hoping that it will simply correct itself in time. You do not believe that discussing the situation in the upcoming meeting will do any good. In fact, you are afraid that tempers will flare, and just the thought of conflict makes you extremely uncomfortable.

You plan to keep a low profile during the meeting, to refrain from voicing any opinions unless directly asked, and to avoid taking sides for or against anyone present. The last thing you intend to do is to “rock the boat.”

Do not show this role description to anyone.
AJAX APPLIANCE CORPORATION ROLE SHEET D

Production Supervisor, Second Shift

You have been an Ajax employee for five years. You are very worried about the current inefficiency in production that has led to quality problems. You feel that the source of the problem is twofold: (1) an outdated plant layout that includes unnecessary steps in the production process; and (2) outdated plant equipment that breaks down frequently, making it difficult to meet production deadlines and causing tremendous headaches for the production workers.

You have talked extensively with your subordinates and have spent a great deal of time observing them as they work, and you are convinced that the majority of them are hard workers who are just as concerned about Ajax’s present situation as you are. However, you do know of one employee on your shift whose attitude is not what it should be, and you have been thinking about laying off this person. Without him, perhaps the shift morale and productivity would improve. You have been meaning to discuss this employee with the plant manager, but the manager is so loyal to the workers that you feel a proposed layoff will be met with resistance; however, you have made up your mind that you will bring up the idea at today’s meeting. If your proposal is, in fact, met with resistance, you plan to tell the manager that you would be willing not to lay off this employee if the manager would support a new plant layout as well as new equipment.

*Do not show this role description to anyone.*
AJAX APPLIANCE CORPORATION ROLE SHEET E

Production Supervisor, Third Shift

You have been with Ajax for six months. In the past few weeks you have been hearing rumors that the company will shut down if the inefficiency in production is not corrected, and these rumors frighten you. Before you were hired at Ajax, you were out of work for a year; during that time you and your family suffered greatly, and you do not care to repeat that experience. Today’s meeting worries you in terms of its possible ramifications. You are fairly certain from what you have observed that the inefficiency lies with the plant layout, which is terribly outdated. It has occurred to you that at least one work station could be eliminated, and you feel that you must state your observation and opinion during the meeting. However, you know that the plant manager, who is powerful at Ajax and considered to be an advocate for the production workers, probably will object to eliminating one or more work stations because this approach would mean a loss of jobs for the workers at those stations.

Stating how you feel about the situation is as far as you will go during the meeting. If you meet with resistance from the plant manager, you will yield to the manager’s point of view; you cannot risk jeopardizing your job and your family’s future.

Do not show this role description to anyone.
AJAX APPLIANCE CORPORATION ROLE SHEET F

Assistant Plant Manager

Although you have been with Ajax for only a year, you feel a strong commitment to the company. You are concerned about the inefficiency in production, but you believe in the company’s ability to find a solution and to survive.

Like the plant manager, you believe that the problem is attributable to outmoded production equipment; unlike the manager, however, you are willing to listen to other ideas on the subject. During the upcoming meeting you want to make sure that the goals of everyone present are heard and that the group chooses a solution that incorporates all of these goals. You realize that finding such a solution will not be easy; but you feel that saving Ajax through this approach will lead to a healthier, happier company in the long run.

Do not show this role description to anyone.
AJAX APPLIANCE CORPORATION OBSERVER SHEET 1

Instructions: During the upcoming role play, you are to observe the interactions of the role players and to write answers to the following questions. Later you will be asked to share your questions and answers.

1. What behaviors do you observe on the part of each role player as the Ajax situation is being discussed?

2. How do individuals react to the different behaviors?

3. What effect does each type of behavior have on the group process?

4. What is the effect of each on moving the group toward a decision?
AJAX APPLIANCE CORPORATION OBSERVER SHEET 2

Instructions: During the second role play, you will again observe the interactions of the role players and write answers to the following questions. Later you will share your questions and answers.

1. What differences are you observing between this role play and the previous one?

2. What conflict-handling approaches do the individual role players seem to be using?

3. How are people reacting differently to these different approaches?

4. What effect are the different approaches having on the group process?

5. What is the effect of each on moving the group toward a decision?
SHARING PERSPECTIVES: EXCHANGING VIEWS ON MANAGERIAL AND WORKER ATTITUDES

Goals
- To explore the origins of certain managerial and worker attitudes.
- To allow the members of a new or transitional team to share and discuss their personal feelings about these attitudes.
- To help a team leader and his or her subordinates to develop an understanding of one another so that they can build effective relationships.

Group Size
All members of a new or transitional team, including the manager. This activity requires that the team members have previous training in trust building.

Time Required
Two to two and one-half hours.

Materials
- A copy of the Sharing Perspectives Manager Sheet for the team leader.
- A copy of the Sharing Perspectives Worker Sheet for each subordinate.
- A pencil for each team member.
- Newsprint and a felt-tipped marker.
- Newsprint reproductions of the manager sheet and the worker sheet (prepared by the facilitator prior to conducting the activity).
- Masking tape for posting newsprint.

Physical Setting
A room with movable chairs for the team members.

Process
1. The facilitator introduces the goals of the activity.
2. The team leader is given a copy of the Sharing Perspectives Manager Sheet and a pencil, and each subordinate is given a copy of the Sharing Perspectives Worker Sheet and a pencil. The team members are asked to complete their sheets. (Ten minutes.)
3. While the team members are working, the facilitator writes the following questions on newsprint:

- What is really meant by the statement?
- What might have created the attitude behind it?
- Why do you consider it true or false?

4. The facilitator posts a newsprint copy of the manager sheet. The team leader is instructed to join the facilitator in the center of the room, and the subordinates are asked to form a circle around their leader and the facilitator. The leader is instructed to share his or her responses to each statement on the manager sheet and to discuss each statement with the facilitator in terms of the three questions listed on newsprint. The subordinates are asked to listen and observe while their leader and the facilitator engage in this discussion. (Fifteen minutes.)

5. A newsprint copy of the worker sheet is posted. The subordinates are asked to join the facilitator in a circle in the center of the room, and the team leader is instructed to be seated outside this circle. The subordinates are asked to share their responses to each statement on their handout and to discuss each statement in terms of the same three newsprint questions. The team leader is instructed to listen and observe while the facilitator and the subordinates engage in this discussion. (One hour.)

6. The leader is invited to rejoin the team. The facilitator assists the leader and the subordinates in establishing a dialogue so that questions and concerns about the preceding discussions may be addressed. (Ten minutes.)

7. The facilitator leads the total team in a discussion of the activity. Questions such as the following are asked:

- When you were observing, how did you react to the assumption that people in your position make the kinds of statements that were listed on newsprint?
- What parts of the discussion you observed were particularly interesting, meaningful, or surprising to you?
- How did you feel as you discussed your sheet? What might account for your feelings?
- What conclusions can you draw about manager and worker perceptions? What do you understand better about those perceptions?
- How might your perceptions of your team leader or your perceptions of your subordinates change as a result of this activity? What kinds of behavioral changes might your new perceptions result in? How might you treat one another differently?
- After participating in this activity, how do you feel about your future together as a team?
What ideas do you have at this time about team norms that you would like to see established (or continued or changed)?

What concerns do you have about your team that have not yet been addressed?

What action can you take to alleviate your concerns?

What would you like to say to your leader or your subordinates at this time?

**Variations**

- If the number of subordinates is particularly large or if the facilitator wishes to shorten the time allotted for steps 4 and 5, the manager and worker sheets may be shortened to five statements each.

- The facilitator may devise different manager and worker sheets based on predetermined problems that are unique to the team involved.

- After step 7 the team members may be instructed to develop specific action plans to address the issues of concern that were uncovered during the activity.

- A follow-up session may be planned to reinforce any positive changes.

**SHARING PERSPECTIVES MANAGER SHEET**

*Instructions:* Imagine that each of the following statements is made to you by one of your subordinates. Designate whether you find each statement true or false by placing a check mark in the appropriate column.

<table>
<thead>
<tr>
<th>Worker Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. “Managers never have enough time for their subordinates.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. “Managers think and act exactly the way their superiors tell them to.”</td>
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<td></td>
</tr>
<tr>
<td>3. “Managers don’t care what their subordinates think or want or how their subordinates feel.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. “Managers have no idea what it’s like to be one of the workers in an organization.”</td>
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<tr>
<td>5. “The most important thing to managers is getting ahead.”</td>
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<tr>
<td>6. “The ones who do the real work in organizations are the workers, not the managers.”</td>
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<tr>
<td>7. “Managers always act superior; they don’t realize how competent their subordinates are.”</td>
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<tr>
<td>8. “The only time a manager talks to subordinates is when they’ve done something wrong.”</td>
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</tr>
<tr>
<td>9. “Managers take the credit for their subordinates’ good work.”</td>
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<td></td>
</tr>
<tr>
<td>10. “Managers tell their subordinates to do things without knowing what’s really going on.”</td>
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</tr>
</tbody>
</table>
SHARING PERSPECTIVES WORKER SHEET

Instructions: Imagine that each of the following statements is made to you by your team leader. Designate whether you find each statement true or false by placing a check mark in the appropriate column.

<table>
<thead>
<tr>
<th>Manager Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. “Workers are only interested in collecting their paychecks.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. “It’s not a manager’s job to motivate subordinates; workers should be self-motivated.”</td>
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<td></td>
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<tr>
<td>3. “Workers aren’t willing to make sacrifices for the organization.”</td>
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<td></td>
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<tr>
<td>4. “Workers are clock watchers who will shirk their duties if they’re not watched constantly.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. “Workers want to be spoon-fed; they always expect their managers to solve their problems.”</td>
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<td></td>
</tr>
<tr>
<td>6. “Workers have no real respect for their managers.”</td>
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<tr>
<td>7. “Every worker thinks that his or her job is the most important in the organization.”</td>
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<td></td>
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<tr>
<td>8. “Workers fail to see the importance of team efforts.”</td>
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<tr>
<td>9. “Workers aren’t concerned with the profitability of the organization.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. “Workers never tell their managers what’s really going on.”</td>
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</tbody>
</table>
WIN AS MUCH AS YOU CAN: AN INTERGROUP COMPETITION

Goal

- To acquaint the members of two teams with the merits of competition and collaboration in both intragroup and intergroup relations.

Group Size

This activity is designed for two teams of eight members each. Teams of more than eight members can be accommodated easily by having the participants play the game in trios instead of pairs and/or assigning some participants to be process observers. If either team has fewer than eight members, single participants may work by themselves (instead of in pairs) or the facilitator may alter the game on which the activity is based.

Time Required

Approximately one hour.

Materials

- A copy of the Win as Much as You Can Tally Sheet for each pair.
- A pencil for each pair.

Physical Setting

A large room with movable chairs for all members of both teams. The teams are seated well apart from each other. Each team is divided into four pairs; the pairs are seated far enough away from one another so that they can discuss strategy privately, yet close enough so that all team members can interact when asked to do so. Figure 1 (page 394) is a suggested configuration for one team.

Process

1. The members of each team are instructed to form four pairs and to arrange themselves into a configuration such as that shown in Figure 1 (page 398). Each pair is given a copy of the tally sheet and a pencil; the members of each pair are instructed to spend a few minutes studying this sheet and discussing their understanding of the game.

---

1 This activity is based on the classic "Prisoner's Dilemma" problem as adapted by W. Gellermann.
2. The facilitator elicits and answers questions about the game and then reads the following directions aloud:

- ‘The title of this activity is ‘Win as Much as You Can.’ Be sure to keep that goal in mind throughout the experience.

- ‘There are three rules:
  a. “You are not to confer with other members of your team, except your own partner, unless you are given specific permission to do so. This rule applies to nonverbal as well as verbal communication.
  b. “Each pair must agree on a single choice for each round.
  c. “You are to ensure that the other members of your team do not know your pair’s choice until you are instructed to reveal it.

- ‘There are ten rounds to this activity. During each round you and your partner will have one minute to mark your choice for the round. Remember the rules. You may now take one minute to mark your choice for round one.” [The facilitator pauses for one minute.]
  a. “If you have not marked your choice, please raise your hand.” [The facilitator makes sure that each pair has completed the task before proceeding, but also keeps the activity moving.]
  b. “Share your decision with all of the other members of your team.” [The facilitator pauses for two minutes while the team members confer.]
  c. “Mark your score card on the tally sheet for round 1 according to the payoff schedule.”
  d. “Are there any questions about the scoring?” [The response to all questions concerning the purpose of the activity should be “The name of the game is ‘Win as Much as You Can.’”]
“You have one minute to mark your decision for round 2.” [The facilitator pauses for one minute.]

a. “Has any pair not finished?” [The facilitator encourages the pairs to make their decisions quickly.]

b. “Now share your decision with the rest of your team.” [The facilitator pauses for two minutes while the team members confer.]

c. “Mark your score card for round 2.”

[The facilitator conducts rounds 3 and 4 in the same fashion as Rounds 1 and 2.]

“Round 5 is a bonus round. You will note that the tally sheet indicates that all amounts won or lost during this round will be multiplied by three. Before I ask you to mark your choice for this round, I’m going to let you discuss this phase of the activity with the other members of your team. After the team discussion, you and your partner will have one minute to discuss your decision, as before. You may now have three minutes for team discussion.” [The facilitator pauses for three minutes.]

a. “You and your partner now have one minute to mark your decision for round 5. Remember that the rules are now in effect.” [The facilitator pauses for one minute.]

b. “Has any pair not finished?” [The facilitator encourages the pairs to make quick decisions.]

c. “Now share your decision with the other members of your team.” [The facilitator pauses for two minutes.]

d. “Mark your score card for round 5.”

[The facilitator conducts rounds 6 and 7 in the same fashion as Rounds 1 through 4.]

[Round 8 is conducted in the same fashion as round 5, with the bonus value increased from three to five times par.]

[Round 9 is conducted in the same fashion as rounds 1 through 4 and rounds 6 and 7.]

[Round 10 is conducted in the same fashion as rounds 5 and 8, with the bonus value increased to ten times par.]

3. The facilitator asks each team to compute its net score from the pair scores. (Example: +18, –21, +6, and +2 = +5. It is possible for a team to score a maximum of +100—+25, +25, +25, and +25—if all four pairs choose Y, the collaboration option, in each round.)

4. The facilitator opens the discussion of the process and its implications. The following questions should be addressed:
Does the “you” in “Win as Much as You Can” mean you as a pair or you as a team? How was your perspective on this issue revealed in your behavior during the activity?

What were the effects of competition in this game? What were the effects of collaboration?

How does your team’s net score compare to the possible net score of 100?

How does this activity relate to your previous experiences with your fellow team members? How does it relate to your previous experiences with members of the other team?

How can you use what you have learned in future interactions with your fellow team members and in interactions with members of the other team?

Variations

The activity may be carried out using money instead of points.

If the teams are large (each consisting of several more than eight members), they may send representatives to the meetings on bonus rounds.

In round 10 each pair may be asked to predict the choices of the team’s other three pairs. These predictions may be posted before announcing the actual choices, as shown in Figure 2. (Actual choices are recorded in the circles after the predictions are announced.)

<table>
<thead>
<tr>
<th>Predicting Partnership</th>
<th>Predicted Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Partnership A</td>
</tr>
<tr>
<td>A</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td></td>
</tr>
</tbody>
</table>

Figure 2. Prediction Chart
WIN AS MUCH AS YOU CAN TALLY SHEET

Instructions: For ten successive rounds you and your partner will choose either an X or a Y, and each of the other pairs will make the same choice. Each round’s payoff depends on the pattern of choices made in your team.

<table>
<thead>
<tr>
<th>PAYOFF SCHEDULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 X's: Lose $1.00 each</td>
</tr>
<tr>
<td>3 X's: Win $1.00 each</td>
</tr>
<tr>
<td>1 Y: Lose $3.00</td>
</tr>
<tr>
<td>2 X's: Win $2.00 each</td>
</tr>
<tr>
<td>2 Y's: Lose $2.00 each</td>
</tr>
<tr>
<td>1 X: Win $3.00</td>
</tr>
<tr>
<td>3 Y's: Lose $1.00 each</td>
</tr>
<tr>
<td>4 Y's: Win $1.00 each</td>
</tr>
</tbody>
</table>

You are to confer with your partner in each round and make a joint decision. In rounds 5, 8, and 10, you and your partner may first confer with the other pairs in your team before making your joint decision, as before.

<table>
<thead>
<tr>
<th>SCORECARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
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<tr>
<td>6</td>
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<tr>
<td>7</td>
</tr>
<tr>
<td>8</td>
</tr>
<tr>
<td>9</td>
</tr>
<tr>
<td>10</td>
</tr>
</tbody>
</table>

Bonus Round: Payoff x 3

Bonus Round: Payoff x 5

Bonus Round: Payoff x 10
RIDDLES: INTERGROUP COMPETITION

Goals
- To provide a situation wherein the members of two teams can observe competitive behavior between their teams.
- To demonstrate how one team interacts with another when one is dependent on the other for the completion of its task.

Group Size
All members of two ongoing teams.

Time Required
One and one-half hours.

Materials
- For one of the teams, an envelope labeled Riddles White Cards, containing a copy of the Riddles Instruction Sheet and twelve Riddles White Cards. (Twelve white 3" x 5" index cards are required altogether. See “Riddles White Cards” in the materials that follow the Variations section.)
- For the other team, an envelope labeled Riddles Yellow Cards, containing a copy of the Riddles Instruction Sheet and twelve Riddles Yellow Cards. (Twelve yellow 3" x 5" index cards are required altogether. See “Riddles Yellow Cards” in the materials that follow the Variations section.)
- One copy of the Riddles Solution Sheet for the facilitator’s use.
- A newsprint flip chart and a felt-tipped marker.

Physical Setting
A large room in which the two teams can meet concurrently in relative privacy. Movable chairs and a table should be provided for each team.

Process
1. The facilitator explains that the two teams will be competing against each other and assigns a table to each team. The facilitator asks each team to select one of its members to enforce the rules at its own table.
2. The facilitator gives one team the envelope labeled Riddles White Cards and the other team the envelope labeled Riddles Yellow Cards. The facilitator asks the team members who were selected to enforce the rules to open the envelopes, read the
instructions to their respective teams, and discuss the instructions with their team members. (Five minutes.)

3. The facilitator elicits and answers questions about the instructions. (Five minutes.)

4. The team members are asked to begin the task. The facilitator responds to a team whenever one of the team members raises a hand. When asked by a team if it has the proper cards for a riddle, the facilitator simply answers “yes” or “no.” (Approximately one hour.)

5. When one team has all the cards belonging to one riddle and has solved the riddle, the facilitator stops the task and tells the members of the teams that the correct solution for each riddle will be given to them at the end of the activity.

6. The facilitator leads a discussion on the following questions:
   - How did you feel about winning? How did you feel about losing?
   - How did you feel when you had to ask the competing team to help you? How did you feel when you were asked to help the competing team?
   - What did you find most frustrating in the task?
   - What was most satisfying or enjoyable?
   - What negotiation skills did you use?
   - How would you describe the communication between the two teams? How satisfied were you with this communication?
   - How might you have proceeded differently?
   - What did you learn about interactions between teams?

   The facilitator records salient comments on newsprint. (Fifteen minutes.)

7. The facilitator leads a discussion on how the learnings could be applied to situations in the workplace. Important items are recorded on newsprint and given to one of the participants for reproduction and distribution to all members of both teams. (Ten minutes.)

8. The facilitator reads aloud each riddle (see the Riddles Solution Sheet) and gives its correct solution. Any questions about the riddles are answered.

Variations

- The teams may be split so that four subgroups are competing. Each subgroup would be given six cards, divided so that each team would receive at least one card from each of the four riddles.
- Joker cards that have nothing to do with any of the riddles may be added (for example, “Neither party had done this before”).

Submitted by Brian P. Holleran.
RIDDLES INSTRUCTION SHEET

Your team has twelve cards that list components of four riddles. The team that is competing against you also has twelve cards that list the remaining components of the same four riddles. Your goal is to get six cards that complete one riddle and then to solve that riddle. You must abide by the following rules:

1. Only one member of your team may visit the other team at any one time.
2. No member of your team may visit the other team two times in succession.
3. Only one member of your team may respond to a visitor from the other team.
4. No member of your team may respond twice in succession to visits from the other team.
5. Your team may not give more than two cards to the other team during any one transaction.

The numbers on the cards are sequential but not consecutive. For example, if card 24 and card 28 belong to the same riddle, card 24 should be placed before card 28; but this does not mean you should expect to find cards 25, 26, and 27.

As soon as your team believes it has the six cards that comprise one riddle, one member should raise his or her hand and ask the facilitator whether or not the six cards belong together. After the facilitator assures you that you have the proper cards, try to solve the riddle. When your team reaches consensus on a solution, a team member should again raise his or her hand and tell the facilitator your answer. If your team finds the proper solution before the other team finds a correct solution, you win the competition.
RIDDLES WHITE CARDS

The following statements should be reproduced on white index cards (one numbered statement per card) for inclusion in an envelope marked Riddles White Cards.

18. All the missionaries can row the boat, but only one cannibal knows how.
51. In other words, one missionary must never be in the company of two canibals, nor should two missionaries ever be with three cannibals.
106. They were able to cross the river. How?

20. They fell through a large chimney and landed in a fireplace, but they were unhurt.
25. They looked at each other for a moment but said nothing.
72. The worker with the clean face washed his face before resuming work. Why did the two workers react as they did with regard to resuming work?
36. Jimmy looked into the barrel and said, “That is less than half full of cider.”
38. The farmer looked into the barrel and said, “No, it is more than half full of cider.”
40. The elevator in the building was in good operating condition and ran from the basement to the twelfth floor.
44. Each morning, when the man left for work, he took the elevator from the twelfth floor to the first floor.
64. And each evening he always got off at the eighth floor and walked up to the twelfth floor.
RIDDLES YELLOW CARDS

The following statements should be reproduced on yellow index cards (one numbered statement per card) for inclusion in an envelope marked Riddles Yellow Cards.

10. Three missionaries and three cannibals approach a river and desire to cross.
15. Their boat will carry only two passengers.
19. The trips must be arranged so that the cannibals will never outnumber the missionaries.

2. Two workers were repairing a roof.
27. One worker’s face was still clean, but the other worker’s face had become well smeared with soot.

52. The worker with the dirty face immediately went back to work.
33. Farmer Brown’s cider barrel was about half full of cider.
53. They did not have any kind of measuring instrument.

63. They settled the matter quickly and accurately without putting anything into the barrel. How?

4. A man lived on the twelfth floor of an apartment building.

48. Each evening, when the man got home from work and was tired, he got on the elevator and pressed the eighth-floor button.

84. Why did he walk up those four flights of stairs?
RIDDLES SOLUTION SHEET

The components and solutions of all four riddles are read to the team members at the conclusion of the activity.

**Riddle 1 (The Missionaries and the Cannibals)**

_The Riddle Components_

All statements with a “1” in the number (that is, cards 10, 15, 18, 19, 51, and 106) belong to Riddle 1, the riddle about the missionaries and the cannibals:

10. Three missionaries and three cannibals approach a river and desire to cross.
15. Their boat will carry only two passengers.
18. All the missionaries can row the boat, but only one cannibal knows how.
19. The trips must be arranged so that the cannibals will never outnumber the missionaries.
51. In other words, one missionary must never be in the company of two cannibals, nor should two missionaries ever be with three cannibals.
106. They were able to cross the river. How?

_The Solution_

The missionaries and the cannibals go back and forth across the river in the following series of diagrammed steps (to be reproduced on newsprint for the team members).

\[
\begin{align*}
\text{C} & \quad = \quad \text{Cannibal} \\
\text{Cr} & \quad = \quad \text{Cannibal rower} \\
\text{M} & \quad = \quad \text{Missionary} \\
\text{Shaded area} & \quad = \quad \text{Passenger(s) in boat}
\end{align*}
\]

![Diagram of Riddle 1 solution](image-url)
Riddle 2 (The Workers and the Roof)

The Riddle Components
All statements with a “2” in the number (that is, cards 2, 20, 25, 27, 52, and 72) belong to Riddle 2, the riddle about the workers and the roof:

2. Two workers were repairing a roof.
20. They fell through a large chimney and landed in a fireplace, but they were unhurt.
25. They looked at each other for a moment but said nothing.
27. One worker’s face was still clean, but the other worker’s face had become well smeared with soot.
52. The worker with the dirty face immediately went back to work.
72. The worker with the clean face washed his face before resuming work. Why did the two workers react as they did with regard to resuming work?

The Solution
Each worker thought that his or her face looked like the other’s.

Riddle 3 (Jimmy and Farmer Brown)

The Riddle Components
All statements with a “3” in the number (that is, cards 3, 33, 36, 38, 53, and 63) belong to Riddle 3, the riddle about Jimmy and Farmer Brown):

33. Farmer Brown’s cider barrel was about half full of cider.
36. Jimmy looked into the barrel and said, “That is less than half full of cider.”
38. The farmer looked into the barrel and said, “No, it is more than half full of cider.”
53. They did not have any kind of measuring instrument.
63. They settled the matter quickly and accurately without putting anything into the barrel. How?

The Solution
They tipped the barrel on the diagonal. If the liquid reached the lip and still covered the bottom, it was more than half full; if the bottom of the barrel showed, it was less than half full.
Riddle 4 (The Man and the Elevator)

The Riddle Components
All statements with a “4” in the number (that is, 4, 40, 44, 48, 64, and 84) belong to Riddle 4, the riddle about the man and the elevator:

4. A man lived on the twelfth floor of an apartment building.

40. The elevator in the building was in good operating condition and ran from the basement to the twelfth floor.

44. Each morning, when the man left for work, he took the elevator from the twelfth floor to the first floor.

48. Each evening, when the man got home from work and was tired, he got on the elevator and pressed the eighth-floor button.

64. And each evening he always got off at the eighth floor and walked up to the twelfth floor.

84. Why did he walk up those four flights of stairs?

The Solution
The man was too short to reach any button above 8" on the elevator panel.
THE VALUE PROFILE: LEGITIMIZING INTERGROUP DIFFERENCES

Goals

- To help two teams within an organization to understand and accept the legitimacy of each other’s values so that they can interact more effectively.
- To assist each team in establishing its own profile of values.

Group Size

All members of two ongoing teams.

Time Required

One hour and forty-five minutes to two hours.

Materials

- A copy of The Value Profile Work Sheet for each member of each team.
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting

A room large enough to accommodate a group-on-group configuration. Movable chairs should be provided.

Process

1. The facilitator introduces the goals of the activity.
2. The participants are asked to assemble into a group-on-group configuration.
3. Each member of each team is given a copy of The Value Profile Work Sheet and is asked to read the instructions on this sheet. The facilitator explains that the members of the team in the inner circle are to engage in the first discussion and establish their team profile; the members of the team in the outer circle are to listen to, but not participate in, this discussion.
4. The team members in the inner circle are instructed to begin; the facilitator assists them as necessary during the value-clarification procedure and records their preferred terms on newsprint. At the conclusion of the discussion, the facilitator

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1 A group-on-group configuration consists of two groups of participants: One group forms a circle and actively participates in an activity; the other group forms a circle around the first group and observes the first group’s activity.
reviews the team's profile and confirms that all members accept the recorded terms as team values. (Thirty minutes.)

5. The two teams exchange circles, and step 4 is repeated. (Thirty minutes.)

6. The facilitator posts the two newsprint lists of terms side by side. All team members are instructed to move their chairs as necessary so that they can see both lists. The facilitator then leads a discussion of the activity, emphasizing the legitimacy of both sets of values. The following questions are asked:

- What reactions did you have to discussing your team’s values? What were your reactions while listening to the other team’s values?
- What happened in your team while establishing the profile? What happened in the other team? How did the development of the team discussions fit with the value profiles that were established?
- What new insights do you have about your own team? What insights have you gained about the other team?
- What can you conclude about team values in general?
- How can you legitimize team values that are different from those of your own team?
- What can you do to increase understanding and acceptance between these two teams? How can you demonstrate your understanding and acceptance?
- How will your new understanding create more effective work relationships between the two teams?

Variations

- Prior to each group-on-group discussion, the members of the observer team may be given pencils and observer sheets and asked to make notes about their observations.
- After each of the group-on-group discussions, the members of the observer team may be asked to demonstrate their understanding of the inside team’s value profile, to ask questions for the purpose of clarification, and/or to voice agreement or disagreement.
- The members of both teams may be asked to complete the work sheet individually before the group-on-group discussions.
- The facilitator may arrange a follow-up session with the participants to track change and progress.

Submitted by Edward F. Pajak.
THE VALUE PROFILE WORK SHEET

Instructions: You and your fellow team members are to work toward establishing a team value profile. To accomplish this goal, you will be discussing each of the following pairs of terms and deciding which of the two terms represents a value that your team holds. During the discussion you should consider such factors as your work styles, the kinds of tasks you perform, and your attitudes toward your work.

belonging
risk
natural
status
cooperation
change
loyalty
facts
flexible
formal

individuality
safety
rational
achievement
competition
stability
opportunity
feelings
dependable
informal
INTERGROUP MODEL BUILDING:
THE LEGO® MAN

Goals

- To extract the learnings from a competitive teamwork experience, in terms of leadership style, developing alternatives, dominance and submission within teams, and distribution of work and resources.
- To diagnose the dynamics of ongoing teams in terms of role taking.

Group Size
All members of two or three ongoing teams.

Time Required
Approximately two hours.

Materials

- Sets of red and white, plastic, interlocking building blocks (such as LEGO® blocks), in the shape of squares, rectangles, and pegs. Each set of building blocks should contain exactly forty-eight pieces, including eleven red 8’s, twelve white 8’s, three red 6’s, two white 6’s, six red 4’s, six white 4’s, three red 2’s, three white 2’s, one red peg, and one white peg. Each team will have one set, and one set will be used by the facilitator to construct the model before the activity begins.
- A copy of the Intergroup Model Building Instruction Sheet for each team.
- A copy of the Intergroup Model Building Construction Diagram for the facilitator (for constructing the display model of the LEGO® man).
- A newsprint flip chart and a felt-tipped marker.
- Blank paper and pencils for the participants (if the teams wish to use them).
- Intergroup Model Building Planning and Assembly Table. (Optional.)
- Intergroup Model Building Planning and Assembly Time Graph. (Optional.)

Physical Setting
A large room with a work table for each team. The work tables should be placed approximately fifteen feet apart. There should be a separate table for displaying the model, placed near the center of the room and approximately fifteen feet from any team’s table.
Process

1. The facilitator assembles the model LEGO® man in advance of the activity and displays it on the table in the center of the room.

2. The facilitator asks each team to choose an observer.

3. The facilitator asks each observer to distribute a set of building blocks among the team members at his or her team’s table, allotting each member approximately the same number of blocks. Each observer is also told to give a copy of the Intergroup Model Building Instruction Sheet to his or her team. The team members are asked to wait for further instructions from the facilitator before handling the materials.

4. The facilitator explains to the observers that they are to monitor team-member behavior during the process of planning and assembling the model. He or she also explains the task of timing the planning and assembly periods for the individual teams. Both phases will be timed, although the teams will be aware of only the assembly-time factor.

5. The facilitator tells the teams that they will be competing with each other in assembling an exact replica of the model LEGO® man on the center table. The teams are told that they are free to structure their time and resources in any way they find useful. The facilitator then reads the Intergroup Model Building Instruction Sheet aloud.

6. When all teams have completed their models, the facilitator announces the winner. He or she then discusses the times of the individual teams in both the planning phase and the assembly phase and reviews representative times of other groups for the teams to use in seeing how they compare with other group norms. The facilitator may put the Intergroup Model Building Planning and Assembly Table on a chalkboard or newsprint or may distribute copies of the table to the teams.

7. The facilitator may also wish to incorporate the Intergroup Model Building Planning and Assembly Time Graph into the discussion by reproducing the graph as a poster or by distributing copies to the teams. He or she discusses outcomes of various types of groups, focusing on characteristics of fragmented, smooth, and conflicted groups.

8. The facilitator delivers a lecturette on the dynamics of problem solving in terms of interpersonal functioning.

9. The observers are asked to give their individual teams feedback on how members used resources, how they worked together on an interpersonal basis, what kind of leadership behavior was observed, and what roles were played. The teams continue to discuss the facilitator’s input and the observers’ feedback regarding team functioning.

10. The teams are asked to share what they learned with the total group. (The facilitator may structure the times allotted for steps 9 and 10 in a way that seems appropriate to the particular group.)
Variation

The facilitator may wish to introduce the variable of “outside consultants” by allowing the members of the first team to complete the LEGO®-man assembly to offer their services to teams that have not yet completed the task. Observers should be alerted to the possibility of new behaviors when these “outside consultants” are introduced into the ongoing team efforts.

This activity was abstracted from a paper entitled “An Exercise for the Diagnosis of Team Problem Solving Effectiveness,” by W.B. Reddy and Otto Kroeger. Used by permission of W.B. Reddy.
INTERGROUP MODEL BUILDING INSTRUCTION SHEET

Each team has a set of forty-eight LEGO® blocks (eleven red 8’s, twelve white 8’s, three red 6’s, two white 6’s, six red 4’s, six white 4’s, three red 2’s, three white 2’s, one red peg, and one white peg).

Your team is to assemble these pieces exactly like the model, which is on the table in the center of the room.

You are to spend whatever time you wish preparing to assemble your pieces. You can work together as a group in any way that you think will be most helpful in preparing to assemble and then assembling the pieces.

There are some ground rules, however:

1. Only one person may leave the table at a time to look at the model. The model may not be handled in any way. The pieces that your team has been given may not be taken from your team’s table.

2. Until you are ready to start the assembly process, you may not exchange the pieces or put any two pieces together. The pieces given to each person must stay in front of that person. They may be handled by that one person, but they may not be fitted together or lined up in any orderly arrangement.

3. When you are ready to start assembling, you should advise your observer so that he or she can note the time.

4. When you are finished assembling, your observer will again note the time. He or she will not tell you the amount of time that your team used until all team times are in. You are to bring the assembled man to the center table, where the facilitator will determine whether or not the assembly has been completed properly.

5. If the facilitator finds an error in assembly, he or she will advise the team that the model is not correct but will not explain what the error is. The observer will start timing again, adding to the original time.

6. Remember that you may have all the time you want to prepare as a group for the assembly process, but let your observer know when you are ready to start assembling.
INTERGROUP MODEL BUILDING CONSTRUCTION DIAGRAM

Top Layer, Face Up
Bottom Layer, Face Down
Composite View
INTERGROUP MODEL BUILDING PLANNING
AND ASSEMBLY TABLE

In Minutes

<table>
<thead>
<tr>
<th>Group</th>
<th>Activity</th>
<th>Mean</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total (N = 110 groups)</td>
<td>Planning</td>
<td>53.46</td>
<td>28.62</td>
</tr>
<tr>
<td></td>
<td>Assembly</td>
<td>11.04</td>
<td>9.48</td>
</tr>
<tr>
<td>Managers (N = 14 groups)</td>
<td>Planning</td>
<td>63.28</td>
<td>4.43</td>
</tr>
<tr>
<td></td>
<td>Assembly</td>
<td>6.41</td>
<td>3.59</td>
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<tr>
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<td>Planning</td>
<td>35.06</td>
<td>25.12</td>
</tr>
<tr>
<td></td>
<td>Assembly</td>
<td>17.53</td>
<td>13.01</td>
</tr>
<tr>
<td>Administrators (N = 11 groups)</td>
<td>Planning</td>
<td>24.72</td>
<td>20.20</td>
</tr>
<tr>
<td></td>
<td>Assembly</td>
<td>27.98</td>
<td>18.01</td>
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Record Time: Planning, 93 minutes; Assembly, 38 seconds.

INTERGROUP MODEL BUILDING PLANNING
AND ASSEMBLY TIME GRAPH

Group Types

*Fragmented.* Autocratic leadership, subgroupings, and minority pressure forces a fragmented group into making rather quick decisions without considering quality alternatives. Openness is not a norm. This type of group exhibits minimal effort and minimal gain.
Conflicted. The members of a conflicted group are cautious and suspicious. Although they consider many alternate plans, they are not able to move toward consensus. They tend to use majority vote, usually as a desperate move; however, there is little commitment to the plan or outcome. This type of group exhibits maximal effort and minimal gain.

Smoothly functioning. The members of a smoothly functioning group tend to be trusting and cohesive; they exhibit high interaction and sharing. They test for consensus without threatening one another, and they seem committed to the plan and outcome. This type of group is characterized by minimal effort and maximal gain.
WIN WHAT, LOSE WHAT?: AN INTERGROUP CONFLICT INTERVENTION

Goals
- To examine the elements of intergroup conflict.
- To illustrate a process of conflict resolution.

Group Size
All members of two ongoing teams that are experiencing a specific conflict with each other.

Time Required
Approximately three hours.

Materials
- A copy of the Win What, Lose What? Team Issues Report Form for each team.
- A newsprint flip chart and felt-tipped markers.
- Paper and pencils.

Physical Setting
A room large enough to allow the two teams to meet separately. Comfortable chairs (but no tables or podiums) should be provided.

Process
1. The facilitator illustrates the elements of a conflict situation.

![Diagram of conflict elements]

- Differences in needs, values, and wants
- Differences in perceiving others
- Differing anticipations of possible gains and losses
- Inability to integrate differences and inability to give and take
2. The facilitator presents a brief lecturette, covering the following points:
   - Differences in needs, values, and desires are always present; these are the primary causes of conflict.
   - Differences in perceiving others are individual to each person. Sharing information and developing communication skills may help resolve these differences.
   - Inability to integrate differences may be resolved by consensus-seeking techniques, bargaining, and other give-and-take approaches to solving issues, rather than by the attempt to achieve unanimity.
   - Differing anticipations of possible gains or losses for each side are usually ignored in conflict-resolution strategies. These anticipations can be dealt with if both factions examine their potential gains and losses. Emotion often exaggerates what could be an easily resolved conflict.

3. The facilitator distributes the Win What, Lose What? Individual Issues Report Form and pencils and asks each participant to complete it. (Fifteen minutes.)

4. The facilitator asks the participants to assemble into their respective teams and gives each team a copy of the Win What, Lose What? Team Issues Report Form. Each team reaches consensus on a rank ordering of five items, based on the data from the individual forms. (Thirty minutes.)

5. When the teams have completed their forms, the facilitator posts their responses on newsprint, pointing out that the key issues are listed in reverse priority.

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<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

Agreement Area

|        | 5         | 5         |
| L      | 4         | 4         |
| O      | 3         | 3         |
| S      | 2         | 2         |
| E      | 1         | 1         |

(high priority)

6. The facilitator asks the teams to examine the data and to focus on issues that they could easily resolve. He or she emphasizes that if they can eliminate some of each faction’s lower priority win-lose issues, they will be able to widen their area of agreement and thus resolve the entire conflict more easily.

7. The facilitator asks the two teams to work as one group in attempting to resolve the number-5 issues.
8. The facilitator draws a line on the posted data summary sheet to separate the number-5 issues from the others. He or she points out that the agreement area is enlarging. The process continues until as many issues as possible have been eliminated.

9. The facilitator discusses the positive results of this approach to conflict resolution. He or she explains that it allows each side to understand better what is at stake for the other.

10. The facilitator asks the teams to choose representatives to negotiate the remaining conflict.

**Variations**

- Step 3 can be eliminated.
- The physical setting can be changed during the activity.
- A “second-thoughts” phase can be introduced after step 8. The teams can have separate meetings to reassess the negotiation. This phase can be conducted in a subsequent training session.
- Step 4 can be done as a group-on-group activity (with the members of one team seated in a circle around the members of the other team).
- The entire process can be carried out using representatives.

Submitted by Kenneth Finn.
WIN WHAT, LOSE WHAT? INDIVIDUAL ISSUES REPORT FORM

What do you see as the most important gains for you or your team in winning the conflict/grievance? List these issues in descending order of priority (1 is the most important, 2 is the next-most important, etc.).

1. 

2. 

3. 

4. 

5. 

What do you see as the most important losses for you or your team in losing the conflict/grievance? List these issues in descending order of priority.

1. 

2. 

3. 

4. 

5.
WIN WHAT, LOSE WHAT? TEAM ISSUES REPORT FORM

What do you see as the most important gains for your team in winning the conflict/grievance? List these issues in descending order of priority (1 is the most important, 2 is the next-most important, etc.).

1.

2.

3.

4.

5.

What do you see as the most important losses for your team in losing the conflict/grievance? List these issues in descending order of priority.

1.

2.

3.

4.

5.
**INTERGROUP CLEARING: A RELATIONSHIP-BUILDING INTERVENTION**

**Goals**
- To “clear the air” between two teams.
- To develop intergroup understanding and acceptance.
- To create the basis for an improved relationship between the teams.

**Group Size**
All members of two ongoing teams.

**Time Required**
Approximately three hours.

**Materials**
- A newsprint flip chart and several felt-tipped markers for each team.
- Masking tape for posting newsprint.

**Physical Setting**
Separate rooms in which the two teams can meet privately and a large room for plenary sessions, with wall space for posting newsprint.

**Process**
1. The facilitator discusses the goals of the activity and the importance to the system of improving or developing the interface between the two teams. (Fifteen to twenty minutes.)
2. The facilitator gives each team a newsprint flip chart and several felt-tipped markers and instructs the teams to hold separate meetings in order to create the following two lists:
   - What we think we already know about the other team; and
   - What we need to know about the other team in order to work more effectively with it.
   The teams are encouraged to develop these lists by consensus, and they are invited to use subgroups as a preliminary discussion step if they choose. Each team is instructed to select a reporter. (Five to ten minutes.)
3. The teams meet separately and prepare their lists. (Thirty minutes.)
4. The two teams are brought back together to publish their lists. The facilitator warns against their forming quick, defensive reactions to each other and imposes a rule that the only reactions may be questions of clarification. The facilitator tosses a coin to determine which set of lists will be revealed and clarified first. A reporter from the first team presents its first poster and entertains questions of clarification. (Other members of the team may help to clarify the data.) Then the second list from the first team is published and clarified. (Ten minutes.)

5. The process is repeated for the second team. (Ten minutes.)

6. The posters are exchanged across teams, and the facilitator directs the two teams to separate again and to develop responses to the data and questions generated by the other team. (Twenty minutes.)

7. The two teams reassemble in the large room, and cross-team pairs are formed. (If teams are of unequal size, the smallest possible subgroups are formed across teams.) The facilitator instructs these pairs to share and discuss their teams’ responses. (Fifteen minutes.)

8. The two teams meet again separately to pool the information gathered in the pairs. The facilitator instructs them to do one of two things:

   - Make a list of new questions about the other team, based on data received up to this point; or

   - Write a statement that begins with: “The best possible working relationship we can have with the other team is...because....”

   (Ten minutes.)

9. In a final plenary session, the reporters from the two teams publish the results of step 8. The facilitator elicits reactions from the entire group of participants. (Twenty minutes.)

10. The facilitator leads a discussion of the next steps that the two teams can take to improve their working relationship. These steps may include monitoring mechanisms. (Fifteen minutes.)

11. The facilitator leads a discussion of the entire experience, reinforcing learnings and commitments.

**Variations**

- The facilitator may instruct the individual members of each team to devise the two lists prior to step 3.

- Step 8 may be done in a plenary session rather than in cross-team subgroups.

Submitted by Lawrence C. Porter.
# INTERGROUP MEETING: AN IMAGE EXCHANGE

**Goals**
- To improve the relationship between two ongoing teams.
- To explore how the two teams interact.

**Group Size**
All members of two ongoing teams.

**Time Required**
Three hours.

**Materials**
- A newsprint flip chart and several felt-tipped markers.
- Masking tape.

**Physical Setting**
One room that is large enough to seat the members of both teams and that has plenty of wall space for posting newsprint sheets. Two nearby rooms are also needed, each of which should be large enough to accommodate one of the teams.

**Process**

1. In a general meeting, the facilitator discusses goals and the schedule of events.
2. The teams meet separately to generate two sets of data on sheets of newsprint: (a) how the members see the other team and (b) how the members think the other team sees them. (One hour.)
3. The total group reassembles, and spokespersons for the two teams post and explain the data. During this phase the facilitator helps members listen, but not respond, to the feedback they receive; their goal is to understand the perceptions of the other team. (Thirty minutes.)
4. The two teams meet separately again to respond to the data and to plan how to process it. (One hour.)
5. In a third general meeting, members of the two teams share their reactions to the feedback. Discussion leads to diagnosis of the way in which the two teams are interacting. Members make contracts across teams to follow through after the meeting. (Thirty minutes.)
**Variations**

- Individual members can be asked to write down their perceptions before the team meetings.
- Groups can direct their attention to critical incidents in the history of the relationship between the two teams. They may be restricted to a list of adjectives only as feedback.
- The process can be carried out in a series of meetings over a period of days or weeks.
THEY SAID, WE SAID: EXPLORING INTERGROUP-CONFLICT RESOLUTION

Goals
- To offer the participants a process and behaviors for resolving intergroup conflicts.
- To provide the participants with an opportunity to practice or observe intergroup-conflict resolution in a safe environment.

Group Size
All members of two ongoing work teams.

Time Required
One hour and forty minutes.

Materials
- Blank paper, a pencil, and a clipboard or other portable writing surface for each of four volunteers (see Step 7).
- A newsprint flip chart and a felt-tipped marker.
- Masking tape for posting newsprint.

Physical Setting
A room that will accommodate a group-on-group configuration. A group-on-group configuration consists of two groups of participants: One group forms a circle and actively participates in an activity; the other group forms a circle around the first group and observes the first group’s activity. In this activity, four participants engage in a role play in the inner circle while the remaining participants observe in the outer circle. Movable chairs should be provided for the participants, and plenty of wall space should be available for posting newsprint.

Process
1. The facilitator introduces the goals of the activity.
2. The participants are asked to contribute examples of intergroup-conflict issues or situations that they have experienced or are experiencing. The facilitator clarifies that the examples need not involve these two particular teams, but may involve these two teams if the participants wish; however, the examples must be situations that the participants would not object to role playing. As the participants contribute sample conflict situations, the facilitator records the highlights of each situation in neutral
3. The facilitator chooses one of the conflict situations and asks for two volunteers from each work team. The volunteers are instructed to be seated in a circle in the middle of the room with the remaining participants seated around them.

4. The volunteers from one work team role play one side of the situation, and the volunteers from the other work team role play the other side of the same situation. The volunteers are asked to spend ten minutes role playing the chosen situation and coming to some resolution of it. The remaining participants serve as observers and are asked to note their impressions of behaviors that helped and those that hindered resolving the conflict. (Ten minutes.)

5. After ten minutes the facilitator stops the role play and asks the four volunteers to discuss answers to the following questions:
   - How do you feel about the resolution of the role play?
   - What did you agree to?
   - Which behaviors helped to resolve the conflict? Which behaviors hindered resolution?
   
   As the volunteers discuss their answers, the facilitator writes their comments on newsprint. After the volunteers have completed their discussion, the observing participants are asked to contribute their impressions about what was agreed to, which behaviors helped, which behaviors did not help, and the resolution of the role play; these comments also are recorded. All newsprint is posted so that the participants can review the content later. (Twenty minutes.)

6. The facilitator makes the following comments about the process involved in resolving intergroup conflict:

   “When two groups disagree and are unable to resolve their differences, it is often because each individual group’s needs were not listened to or met. A successful approach to intergroup conflict resolution provides two things: (1) an opportunity for each group to state and clarify what it needs and (2) a commitment from each group to listen to and try to understand the other group’s needs.

   “After both groups have stated and clarified their needs and listened to and understood the other group’s needs, the two groups explore through back-and-forth dialogue how to meet both sets of needs. They look for opportunities to meet both groups’ needs simultaneously. Also, they explore the reason behind each group’s needs: Why does the other group want a particular thing? What will that thing provide? Sometimes discovering the reasons behind needs can be the key to a successful resolution.
“Once a resolution has been determined, both groups should summarize aloud what they have agreed to do. Sharing summaries ensures that both groups are taking away the same action plan and are committed to carrying out that plan.”

As the facilitator talks, he or she outlines this process on newsprint, posts the newsprint prominently, and then elicits and answers questions about the process. (Ten minutes.)

7. The facilitator chooses another situation to role play using the process just described; he or she asks for two different volunteers from each work team. The new volunteers are instructed to be seated in the inner circle. In addition, all four volunteers are given blank paper, a pencil, and a clipboard or other portable writing surface. Volunteers are told that they will spend a couple of minutes making notes on his or her own team’s needs before beginning the role play and instructed to make notes on the other team’s needs during the role play. The facilitator reminds the volunteers to make sure their teams’ needs are stated and understood, to make sure they hear and understand the other team’s needs, and to explore ways of meeting both sets of needs.

8. After allowing a few minutes for the volunteers to make notes, the facilitator asks them to spend ten minutes role playing the new situation. (Approximately fifteen minutes.)

9. After the role play has been in progress for ten minutes, the facilitator stops it and invites the four volunteers to discuss answers to the same questions asked in connection with the previous role play:
   - How do you feel about the resolution of the role play?
   - What did you agree to?
   - Which behaviors helped to resolve the conflict? Which behaviors hindered resolution?

Again the facilitator writes the volunteers’ comments on newsprint. Subsequently, the observers share their impressions about what was agreed to, which behaviors were helpful, which behaviors were not helpful, and the resolution of the role play; these comments also are recorded. All newsprint is posted next to the sheets with the comments on the previous role play. (Twenty minutes.)

10. The facilitator leads a discussion comparing the two role plays and concluding the activity. The following questions may be helpful:
   - How did the second role play compare with the first in terms of the role players’ feelings about the resolution?
   - What similarities and differences did you see in the two role plays?
   - What have you learned about useful behaviors and processes in conflict resolution?
What behaviors do you plan to use the next time you are involved in an intergroup-conflict situation?

(Fifteen minutes.)

Variations

- Prior to the session, the facilitator may ask the participants to write summaries of intergroup-conflict situations that they have experienced, are experiencing, or have observed. Then these situations may be read in the total group and used as the basis for the choices of role-play situations.
- After Step 10 the facilitator may ask the participants who have only observed so far to choose another situation and role play it. At least one participant should observe each role play and share feedback with the role players afterward.
- The participants can be taught the effective conflict resolution process before they begin the role plays.
- The activity can be used with a group other than two intact work teams.

Submitted by Jason Ollander-Krane and Neil Johnson.
PERFORMANCE UNLIMITED:
SOLVING PROBLEMS AS A TEAM

Goals
- To encourage the development of group problem-solving skills.
- To encourage the development of group decision-making skills.
- To heighten participants’ awareness of how group dynamics affects teamwork.

Group Size
All members of an intact work team.

Time Required
Approximately one hour.

Materials
- One copy of the Performance Unlimited Handout for each participant.
- A pencil and a portable writing surface for each participant.
- A newsprint flip chart and a felt-tipped marker for the facilitator’s use.

Physical Setting
Any room in which the group can work comfortably. Movable chairs should be provided.

Process
1. The facilitator explains the goals of the activity. (Five minutes.)
2. Each participant is given a copy of the Performance Unlimited Handout and is asked to read the instructions. The facilitator notes that all of the instructions are on the handout. (Five minutes.)
3. At the end of five minutes, the facilitator instructs the participants that they will have fifteen minutes to make their rankings. (Fifteen minutes.)
4. After fifteen minutes, the facilitator calls time. The spokesperson for the team reports the order in which the team decided to address the problems and provides a brief rationale for the order chosen. The facilitator records the ranking and reasons on the flip chart. (Ten minutes.)
5. The facilitator elicits discussion with questions such as the following:
   - How satisfied are you with the final ranking?
How do the decisions reflect the ideas and viewpoints of all members? What process did you use to arrive at the ranking and to determine which ideas to incorporate and which to exclude?

What elements of the process pleased you? Displeased you?

As you worked together, did some members’ opinions conflict? If so, how were the conflicts handled?

What are the benefits of working together as a team to solve problems?

What are some drawbacks to team efforts in solving problems? How can you overcome some of these drawbacks?

How are these five issues handled in this team? How could they be improved? (Twenty minutes.)

**Variations**

This activity could be used as a team-building activity or as a warm-up to solving a real work issue or problem.

The scenario in the handout can be revised to reflect actual situations that a team is experiencing.

The activity may be used with a heterogeneous group.
PERFORMANCE UNLIMITED HANDOUT

Instructions: You are a member of Performance Unlimited, a team of highly skilled (and well-paid) performance consultants. Read the scenario below and decide the order in which the five work issues should be addressed by the new team leader. All of the information available is included in this handout.

Read this handout, and feel free to make notes about your ideas. Rank the issues individually. Then the group will rank the issues and provide a rationale for the ranking. Choose a member who will serve as spokesperson. You will have fifteen minutes to make your decisions.

Scenario

Pat has accepted a position as the team leader for a team of computer programmers. This is Pat’s first leadership position. The team includes five other members:

- Chris is a twenty-year company veteran with a reputation for being difficult.
- Terry is a competent programmer but lacks self-confidence.
- Kim is soft spoken but impatient.
- Dale is a dynamic person with questionable technical skills.
- Kelly is a recent college graduate with many new ideas and not much follow-through.

Certain issues are present with this team, and Pat must decide on the priorities for addressing these issues.

Issue: Communication

Kelly is full of good ideas but fails to communicate effectively with other members of the team. Even when Kelly does try to communicate, Chris and Kim refuse to listen and dismiss the ideas as those of a newcomer.

Issue: Power

Chris is the informal team leader. Kim and Dale always check in with Chris before following through on Pat’s instructions. Kelly disrupts the team by constantly challenging Chris.

Issue: Trust

Chris and Kelly do not trust each other and spend too much time trying to determine each other’s motives. In conflicts, Kim and Dale defend Chris’s actions while Terry supports Kelly.
**Issue: Roles**

The team seems to immerse itself in projects without well-defined roles. Frequently, several people work on one part of the project, leaving other parts of the project unattended. Despite this disorganization, the team always manages to deliver the finished project on time.

**Issue: Equality of Effort**

Often Kelly and Terry put in extra hours. Kim and Chris are willing to do their share but are not willing to work after hours. Dale often leaves early, leaving other members of the team to finish the work.

Pat should address the team’s issues in this order:

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<tr>
<th>Individual Ranking</th>
<th>Group Ranking</th>
<th>Rationale</th>
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