

TEAM BUILDING 101 FOR ACCOUNTANTS

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ABSTRACT

This manuscript describes why accountants need to attain good teamwork skills and how accounting instructors can use team projects to improve students' teamwork skills. An action plan with handouts and exercises for accounting educators are provided.

INTRODUCTION

"The class will work in teams of three, and the project will be due in two weeks. Good luck," said Professor Smith.

Too often, "good luck" is the only team-building advice students receive from their accounting instructors. The instructor then feels self-assured that s/he has properly integrated teamwork into the course. However, merely assigning group projects does not assure that students will acquire needed team-building skills. This paper describes why teamwork skills are important for today's accounting professionals and how instructors can create meaningful team projects that will improve students' teamwork skills.

The Appendices include a full team-building package to guide instructors and students through the team-building process. The handouts and exercises promote team member communication, positive interdependence, and accountability.

BACKGROUND

The societal role of the accounting professional is changing rapidly. Ten years ago, there were two models for the accounting professional: the public accountant (CPA) and the accountant in industry. Public accountants earned a majority of their revenues from auditing. Accountants in industry acted as support staff who provided services, upon request, for the functional areas of business. Today, CPA firms earn more revenues from consulting and other financial services than they earn from the audit function. Further, many accountants in industry don't think of themselves as "accountants" anymore; instead, they see themselves as financial information specialists who work as members of the management team.

Recognizing the CPA's rapidly changing role, the American Institute of CPAs began the *CPA Vision* project

to build a "comprehensive and integrated vision of the profession's future" (www.aicpa.org/vision/index.htm and cpavision.org/vision/wpaper01b.ctm.) In this vision, the CPA profession identified interpersonal skills as a core competency. These interpersonal skills include communications skills, people development, relationship management, and the ability to influence, inspire, and motivate others. In other words CPAs need team skills.

Accountants in industry undertook a similar change management project (Siegal & Sorensen, 1999). That study revealed that accountants in industry serve internal customers, e.g. manufacturing and marketing, as business partners. As members of the management team, accountants participate in planning, organizing, and controlling the operations of the organization. So, accountants can no longer stay in the back office and accounting students can no longer sit in the back rows of the classrooms. They are forced into the fray—required to speak, listen, and work as team members with people of diverse backgrounds.

Because cross-functional business teams are the norm in both public accounting and in industry, all accounting majors need to develop teamwork skills before they enter the profession. This paper describes how accounting instructors can effectively integrate team-building skills into their curriculum and also provides specific teambuilding exercises.

ESTABLISH IMPORTANCE OF TEAMWORK

Show students teamwork skills are important in their professional accounting careers by providing specific examples of job situations that require teamwork, e.g. audit engagements, consulting projects, or activity based cost implementation programs. In addition, the instructor should provide students with evidence that business decision-making is improved when teamwork is used (Hackman, 1990; Wellins, Byham & Wilson, 1991; Bamber, Watson & Hill, 1996). If students understand the benefits they will derive from collaborative work, they will be more willing to learn teamwork skills.

In addition to demonstrating the importance of team skills in their work environment, demonstrate to students that their course learning could be improved by instructor participation in group learning activities. In-depth discussion of group learning research is not necessary, but brief summaries of convincing research evidence would be

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useful (Cooper, Prescott, Mueck & Cuseo, 1990; Cotell & Millis, 1992).

After establishing the importance of teamwork skills, the instructor must recognize and reinforce those teamwork skills during team projects. The next sections identify the group skills and provide specific guidelines to help the instructor reinforce those skills.

RECOGNIZE AND REINFORCE TEAMWORK SKILLS

Research has shown that merely putting students in groups and telling them to work together does not, in and of itself, promote higher achievement (Johnson & Johnson, 1990). For group skills to be internalized, the group members must recognize the team-building skills and have those skills reinforced, e.g. during the team project. Therefore, instructors must not only explain team-building skills but also, instructors must support their explanations with practice and reinforcement. Seven basic rules for team members follow.

1. **Know Your Team Members:** Know and trust fellow teammates so the members can share resources, give and receive help, divide the work, and contribute to mutual goals. Make time to get to know group members personally. Look for teammates' strength areas and build on them.
2. **Communicate Accurately and Unambiguously:** Practice effective speaking and listening skills. Information senders need to send complete, accurate messages, and listeners need to provide feedback signals during the communication. A good way to provide feedback signals is to paraphrase the concepts, feelings, or intent of the sender. The receiver should try to understand the concept of the sender and refrain from evaluating the information. Moreover, effective listening requires the listener to understand, then to be understood.
3. **Accept and Support One Another:** Demonstrate acceptance by expressing warmth and understanding. When fellow group members feel accepted, they will participate more fully in the group process. One way to support fellow team members is by praising them when they have good ideas or when they share their learning others. Acceptance and support are also useful in resolving group conflicts (Johnson, 1971; Johnson & Noonan, 1977).
4. **Check for Understanding:** Regularly, ask fellow group members for feedback about the messages sent. In addition, ask for feedback in a non-judgmental way: "Do you understand?" may evoke defensive responses. But asking, "Would you mind rephrasing what I just said, please? I'm not sure I expressed the idea clearly," is a non-

threatening approach, which encourages open discussion.

5. **Share Ideas and Understanding:** For group learning to be effective, team members must share learned ideas. Set aside time during the group project to accomplish this sharing. Team members may ask questions such as, "Is there anything else we could consider?" Do not evaluate ideas, instead record and reflect the possibilities.
6. **Check for Agreement:** Frequently ask each other, "Is there agreement?" Allow and encourage team members to openly discuss goal, role and task issues. This practice must be an explicit agreement, or the group risks being undermined by dissent. Do not assume silence means consent.
7. **Resolve Conflicts Constructively:** Some conflict is useful, and most groups experience mild conflict during their "storming" stage of group development. However, group conflicts must be resolved in a timely manner. One way to assist groups is to provide them with specific instructions about how to handle conflicts. Instructors need to decide, a priori, their level of participation in dispute resolution. Appendix 1 (Recommended course of action for team problems) provides an example of one professor's approach, which involves significant participation by the instructor. Regardless of the level of instructor involvement, though, the group members need explicit directions from the instructor so they know how to handle disputes.

The seven rules described above help the instructor recognize and reinforce team skills. The following sections, based on earlier works by Johnson & Johnson (2000) and Dishon & O'Leary (1998), describe other processes that result in effective team building assignments.

DEFINE THE TASK

Clear outcomes begin with clear objectives. To maximize students' successes accounting instructors must establish clear objectives at the outset of the project. In addition to the project requirements, students need guidelines that address the process. For the process portion, setting objectives includes preparing timelines and progress reports. Asking students to submit a finished project with no intermittent feedback is not an effective policy for reinforcing teamwork skills. Effective managers delegate entire projects only to experienced, knowledgeable employees. Establishing checkpoints for students to submit progress reports not only assures students they are on the right track, but also helps students to practice effective teamwork skills.

The Team Project Guidelines Handout, Appendix 1, describes how instructors can clearly establish team objectives of the team and distinguish instructor and team

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member responsibilities. The guidelines suggest the instructor takes an active role as the team supervisor. Therefore, the instructor shares responsibility for student learning and the team members have a shared responsibility to keep their instructor (supervisor) informed about group progress.

CREATE A PSYCHOLOGICAL CONTRACT

To accelerate group productivity and open lines of communication, the instructor should encourage student groups to develop psychological contracts. A psychological contract is a set of expectations about who will provide what in a relationship. The contract is dynamic in nature; thus it may be updated or changed as desired. Although psychological contracts are usually not explicit, it is a good idea to have student groups create a written set of expectations during the team's early stages of development. Some elements of the psychological contract may include how performance will be measured, general rules of conduct, and some contingency planning. For example the contract may describe what will happen if a team member acts in an unprofessional way, submits work late, or does not submit work. The Psychological Contract in Appendix 2 can be used to help team members make behavioral expectations explicit. Though it is not necessary to write out the contract, having a written guide provides group members with a clear record that is most helpful when things go wrong. After all, when students become accountants and work with clients, they will use contracts which define client desired outcomes. This contract will help students define the process, rationale to follow, the group rules and to recognize specific member' roles.

ESTABLISH APPROPRIATE TEAM MEMBERSHIP

Appropriate team membership is an important component of team building exercises. Most research suggests that heterogeneous groups improve social learning, aid acceptance of diversity, raise self-esteem, help groups work toward common goals, and gain respect for one another (Nastasi & Clements, 1991; Slavin, 1989; Davidson, 1990). However, if instructors use heterogeneous groups, they will need processes in place to help the group deal with non-performers such as free-riders and social loafers. Basically, members should realize they are expected to carry part of the work load, not just share the recognition for a job done well by their team mates. One approach to handle non-performers is to address the issue from an ethical perspective (See Appendix 1, "Participation by team members").

ESTABLISH TEAM MEMBER ROLES

Understanding team roles and eliminating role

ambiguity is an important element in coping with the team development process. Successful teams need a balance of task and relationship roles. Thus, selection of team members should consider this balance. Task roles are behaviors related specifically to the team's task or activity. Examples of task roles include seeking and providing information, elaborating to help the team understand the issue, evaluating information, monitoring information, and coordinating activities. Task roles help the team complete specific activities and achieve its goal. Relationship roles refer to the social interaction of team members. Examples of relationship-oriented roles include encouraging team members, suggesting compromises, gate keeping to protect the group from unneeded interference, and monitoring the team's performance. Team members who prefer task roles may have little patience with the relationship roles, and those who prefer relationship roles may be offended by the seemingly abrupt manner of team members displaying task oriented behaviors. Achieving goals comes with the appropriate balance of these roles, and the balance of these roles differs with the task, the environment, and the deadline of the project. Team members can achieve this balance by monitoring team members' behaviors. When the project gets stuck, the team member who is skilled in the needed role is encouraged to assist. For example, if two team members present opposing arguments and stand firm in their discussions, then a team member who is relationship-oriented may step in to suggest a compromise position. The *Role Assignment Exercise, Appendix 3*, will be useful for teaching students different roles and how to assign team roles. Groups that complete this exercise will find the group experience much more rewarding and more productive.

MEET WITH TEAM MEMBERS

Attending some, but not all, group meetings to observe and provide feedback is an important instructor activity. Regular meetings with the instructor provide valuable insights for both students and instructors. Instructors can observe each group's progress and provide feedback. During the beginning stages the instructor should meet with the entire group. Later, the instructor could meet with a smaller subset (or one member) of the team. However, be careful to rotate the team members who meet with the instructor to avoid creating power differentials within the group.

When attending group meetings, instructors should use interacting, not intervening, behaviors when meeting with groups (Dishon & O'Leary, 1998). Instructors should not intervene by settling disputes, giving answers, or providing opinions. Instead, the instructor should model correct team skills and behaviors. For example, if dominant group members are doing all of the talking the instructor could say, "let's hear from some of our other group members." When the team progresses to the norming phase, the group members should begin to model these group skills, and the

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instructor's presence becomes less important.

The instructor may also provide assistance when a group falls behind. But remember, praise the group in public; admonish in private. So if the instructor feels a group is falling behind, discuss this with the team confidentially.

REVIEW AND MANAGE TEAM DEVELOPMENT STAGES

The stages of team development are regularly discussed in introductory business courses. The accounting instructor cannot assume, however, that learning automatically follows such discussions. When instructors provide opportunities for students to practice what was discussed in fundamental courses team development skills are reinforced. When students complain their group is not performing, remind students of the group development stages, forming, storming, norming, performing, and adjourning. Many teams move chronologically through these stages, while others skip over a stage or regress. Reminding students about the group stages helps them know what to expect, and gives them hope that better times may lie ahead.

During the forming stage, students get to know each other and are usually apprehensive. However, if the importance of teamwork has been properly established students will be less likely to ask "What's in it for me?" and the forming stage will progress more smoothly. Early in the forming stage, it is useful for a team to establish explicit team values and rules. Typical team rules might include (1) only one person speaking at a time and (2) all team members will come to meetings prepared. Team rules should also be reviewed in later stages of team development to act as a reminder and to provide an opportunity for revisions.

During the storming stage, conflicts emerge among group members. A moderate amount of disagreement is beneficial, particularly if it involves issues instead of personalities. Hostility, infighting and jockeying occur during this stage. Instructors can help groups manage this process by listening to both sides of the issues. Students may not want to take time to work through the conflicts, but the instructor should remind them that solving the case (or problem or project) is only part of the assignment—learning teamwork skills is an equally important part of the assignment.

During the norming stage of group development, members come together by adhering to the groups' standards of behaviors. Group members tend to feel a sense of belonging. Instructors should reinforce these harmonious behaviors by praising students and asking students to discuss who is responsible for what tasks? A handwritten note from each student describing their responsibilities encourages students to commit their energies to the group project.

The performing stage of group development occurs when students work synergistically to accomplish their

collective objectives. Student groups can work with complex tasks and can handle disagreement and membership disagreement in mature ways. Care must be taken to avoid "groupthink" during this process. Instructors can help students to recognize and value team member uniqueness, encourage differing views, discount stereotypes, and openly express concerns and ideas. Instructor interacting, not intervening, behaviors encourage groups to manage problems before they occur.

Adjourning is the final stage of group development. Observing students during this final phase is important, as these moments demonstrate whether the group worked well together, or whether a couple of people completed the project. Some groups plan a final activity, as a coffee break or lunch. Other groups divide into dyads or triads, leaving the non-performing members out of the social loop. This can be stressful time for those students who are not included in the final activity. One way to diminish uneasiness is to hold a "lessons learned" session after final projects have been submitted. Lessons learned sessions help students take responsibility for group activities and reduce the general complaints about working in teams. During this session the instructor simply poses a few well-placed questions to each group. Group members brainstorm what they did well, what they were most proud of, and finally what would they have done differently, or what would they suggest to other students attempting a similar project.

To monitor and document the group development process, instructors will find the *Decision Thermometer* and the *Group Development Clock* (Appendices 4 and 5) helpful. At several points in the group development (early, mid term, and end of semester), display the thermometer and the clock and ask the group members to record, anonymously, where they think their group falls on each scale. For the thermometer, they can write down any percentage between zero and one hundred. For the clock, they should use whole digits from 1 to 12. As the group moderator, the instructor will collect the votes and tally the scores. At the next meeting, the results will be displayed and discussed.

The results of the *Thermometer* and *Clock* exercise often provide important insights into the group dynamics. Dominant group members often believe that the group is close to consensus (*Thermometer*) and close to synergy (*Clock*). However, if there are wide disparities in the *Thermometer* and *Clock* votes, then the team should revisit its values and rules to help resolve the differences and make a plan for bringing the entire group to a higher level of consensus and development.

CREATE POSITIVE INTERDEPENDENCE

Positive interdependence exists when all group members benefit from the success of other group members. Positive interdependence can be created within the group in several ways: (1) ask the group to create a common goal (an A on the project, for example), (2) establish a mutual

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reward system so that the score for the team is dependent on the performance of all group members, (3) establish team member responsibilities/roles, e.g., a team leader, team reporter, team spokesperson (this topic is discussed in more detail later in the paper).

The Role Assignment Exercise, Appendix 3, offers students a way to define functional group roles and ensure that task and maintenance behaviors of group members are appropriately interrelated so that the group's goals are achieved. Upon completion of this exercise students should appreciate individual group member contributions.

HOLD INDIVIDUAL TEAM MEMBERS ACCOUNTABLE

Two activities will foster individual accountability: 1) regularly record team-meeting minutes; and 2) follow up team meeting minutes. Students balk at these activities because they view meeting minutes as busy work. But these two activities simplify the management of team processes and can clearly differentiate performers from non-performers. The Team Project Guidelines, Appendix 1, includes a section, "suggested log of team activities," to satisfy this component.

Meeting minutes should be written in memorandum form and should include the date, the receiver, the sender, and the subject. Minutes should be concise; include the purpose of the meeting; describe what was accomplished during the meeting; describe what tasks and responsibilities were assigned; describe who is responsible; and, define when the deliverables are due. Holding individual team members accountable can be a major stumbling block for students. Managing with meeting minutes will go a long way in helping students achieve their team goals.

CONCLUSION

Increasingly, business professionals expect accounting graduates to possess effective interpersonal and communication skills. More specifically, the role of accountants today includes the ability to function effectively in teams. Accounting majors often resist learning teamwork skills because the activities designed to teach these skills are viewed as busy work, and the role is contrary to the traditional image of an accountant as a solo operator.

This paper begins by providing guidelines for breaking down students' resistance to learning teamwork skills. Next, the paper identifies specific teamwork skills that need to be reinforced. Seven behavioral guidelines are suggested: know your team members, communicate accurately, accept one another, check for understanding, share ideas, check for agreement, and resolve conflicts constructively. Finally, the paper describes processes for developing effective teamwork projects that reinforce teamwork skills. The processes include (1) define the task, (2) create a

psychological contract, (3) establish appropriate team membership, (4) establish team member roles, (5) meet with team members, (6) manage team development stages, (7) create positive interdependence, and (8) hold individual team members accountable. The team building package (appendices) provides valuable instructor and student aids designed to transition accounting groups to accounting teams.

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**APPENDIX 1
TEAM PROJECT GUIDELINES**

Purpose and Objectives of Team Projects

The purpose of team assignments is to create a synergy among diverse persons. This synergy results in a better product than would be possible if only one person worked on the project. From a practical standpoint, most team projects will be divided into parts, and each member will bear primary responsibility for a particular portion of the project. This approach is acceptable, however each member bears the responsibility to review, study, and critique every portion of the solution. Without this review, study, and critique, the team project becomes little more than a *tag team*, with little or no synergy created.

Assign Responsibilities and Establish Deadlines

The team may want to explicitly establish the responsibilities of the team members. It is not necessary to do this in writing (like a contract), but at least say it out loud to each other, e.g., "I will take primary responsibility for part 1." All team members may work on all portions of the project, or individual members may take responsibility for individual portions of the project. If individual team members are assigned portions of the project, your instructor (your supervisor) would like to know which team member completed which portion(s). The team should also establish deadlines for completion of the individual portions of the project.

Keep your instructor informed of group progress. S/he is a team member, and s/he deserves to be informed. The ultimate responsibility for team success lies with your instructor.

Participation by Team Members

When you are assigned team projects, all members must contribute their fair share to each assignment. For example, if there is a writing project, each teammate **MUST** participate in the final product in a meaningful way. This should include either participation in the composition of the original draft, or participation in the review and rewrite of the final report. Accordingly, all team members should be fully aware of the content of all team projects. If you allow another student to obtain course points without making a fair contribution to the team effort, then you are contributing to a general lowering of the academic and ethical standards of the University. Moreover, if all members do not make a fair contribution, then this contributes to deception of potential employers and other academic institutions. Thus, you are obligated to take action when you know another team member is not making a fair contribution. Though this confrontation may be difficult it is an important part of your obligation as a student and team member. At work, it is an important part of your obligation as an employee.

If an individual team member does not contribute, or is not fully aware of the content of team projects, then all team members are guilty of taking or giving credit in an unethical manner. Accordingly, all team members are in violation of the University's Code of Conduct (see ethics below). For this reason, group assignments should be completed several days prior to the assigned due date, so each team member can review the completed project, and provide final input and comments.

Recommended Course of Action for Team Problems: early in the term

If there are any team problems, you have a moral responsibility to discuss it with your team members. If there is no immediate resolution, then your instructor (your supervisor) should be informed immediately. Your instructor is a member of the team and she bears ultimate responsibility for success of the project. Just like in a work environment, the supervisor must receive feedback on team progress, or she will be unable to evaluate and control the project. You have a responsibility to inform your supervisor. This is not a violation of your team members' privacy, nor is it a violation of team norms. It is a moral imperative.

Recommended Course of Action for Team Problems: later in the term

If there are any team problems, you have a moral responsibility to discuss it with your team members. As the term progresses, your instructor will take less of an active role as a supervisor. You will be required to take responsibility to monitor and govern your team activities. Your instructor is still available for consultation, but will not actively intervene to resolve problems/conflicts.

Team Project Supervisor

Your instructor is the team project supervisor. He is a member of the team and he has a stake in the outcome. Treat

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your instructor in the same manner as you would treat a project manager at your work. Consult with him, confide in him, ask him questions, and share your problems with him. It is important that you inform your instructor of any problems that you have with your team members, either with their attitude, behavior, quality, or quantity of contribution to the group effort. Because your instructor is acting as the team supervisor, you have a responsibility to inform him of any team problems early (prior to the due date of the first team assignments). When properly informed, your instructor may be able to prevent future group problems by becoming more active in the administration of the team project.

Dominant Team Members

Some team problems occur because one or more team member dominates the team effort. Each team member must not only allow, but also encourage participation by other team members. If you are a dominant personality, practice good listening skills and manage your urges to “do it all.” You may, indeed, do it all, but you have a responsibility to allow all team members to participate. Do not deny them this learning experience. This is part of the difficult task of learning to delegate responsibility. If you have problems with dominant team members, follow the same course of action as you would for non-performing group members: discuss the issue with the team member, then with your instructor.

Suggested Log of Team Activities

You may use this log format (or keep your own notes). However, it is highly recommended that you keep some record of team activities and responsibilities. Recording individual contributions clearly differentiates performers from non-performers.

Team Member	Primary Responsibilities

Meeting Dates	Members Attending	Accomplishments, Problems, Comments

PEER RATING FORM

Group Work

Treat the group projects as much like a real-world team as possible. Expect performance from your team members just as you would in your work. If you have any problems, you should discuss the problems with your team members. Then, if there is no resolution, you should discuss the issue with your instructor. Just like in a work situation, your instructor has the right to reassign team members at any time. If a team member fails to perform, he/she may be required to complete the project independently. In this case, your instructor will act as a surrogate team member to replace the missing team member.

Group Grade

With group projects, it is possible that all group members might not share equally in the workload. In such a case, it would not be fair to assign the same grade to all members. This evaluation form is your opportunity to inform your instructor of how you perceived the members' participation. You may also use this form to let the instructor know of any other potential problems.

Peer Pressure Not to “Rat” on Your Teammates

World-class organizations cannot tolerate those who “free-ride” on the backs of others. Nor can we tolerate those who refuse to hold “free-riders” responsible. You are now part of a world-class organization (the College of Business), and you have a professional and ethical responsibility to keep your instructor informed. It is no longer appropriate or ethical to protect your friends and/or teammates by not “ratting” on them. Without the flow of information to the instructor, you may not achieve your objectives. If any team member is not making a fair contribution, you have an ethical responsibility to inform your instructor immediately. Immediate action is required or the project is doomed to failure before the problem is fixed.

Worksheet and Notes on Team Performance

Use the following criteria in evaluating team members. Use letter grade (A, B, C, D, or F) or number score (1 - 100) in the

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boxes to support your assessment.

	<u>Team Member</u>			
Attitude, effort, cooperation				
Meeting attendance, phone, e-mail, etc.				
Quality of work				
Quantity of work				
Meeting deadlines				
Leadership				
Creativity				
Other criteria:				
Overall assessment				

Summary Assessment

List the other members of your team (excluding yourself). In the “points allocated” column, next to each group member, write the number of points out of a total of 100 that you feel represents the relative contribution of the team member. Use the criteria on the preceding page to guide you. For example, if there were two other members of your team, and you feel one member contributed about twice as much, you may assign points of 33 to one and 67 to the other.

Please try to make a decision about whose contribution added the greatest value. Search your recollections and perceptions carefully. As a business manager, you will often be faced with the tough choice of selecting one employee over another. You can do this by adding a comment at the bottom of the page, or by assigning more points to that team member. If you are not able to assign different point values, then please note the team member’s particular strengths or weaknesses.

Your rating is confidential. No one except your instructor will see these forms.

Summary assessment table	
Team member name	Points allocated
Total points	100

Print your name here: _____

You may include written comments on the reverse side.

**APPENDIX 2
PSYCHOLOGICAL CONTRACT**

A psychological contract is a set of expectations about who will provide what in a relationship. Sometimes it's a series of agreements between group members. It is dynamic in nature: thus, it may be updated or changed or desired. But, unlike a business contract, a psychological contract is generally not explicit.

Lacking definitive member expectations groups are open to problems. People make contributions to their group—such as effort, skills, ability, time and loyalty. In return for these contributions, membership in a group provides rewards such as recognition, status, and in this class, a portion of the grade, to the individual. Psychological contracts greatly benefit groups, since they help groups plan, save time and resolve conflicts.

Psychological contracts:

- Identify why the group exists and what it hopes to accomplish
- Describe how the group should work together to achieve its goals
- Expresses group values
- Draw on creativity, input, commitment
- Make public specific, measurable goals and results
- Make public each person's contribution to the team
- Spell out what the group cannot control
- Focus on individual responsibilities
- Create a strategy for "if only" thinking

Some Things To Consider When You Develop The Psychological Contract

1. Team Values

- There will be a reason/purpose for all meetings
- There will be no personal attacks
- Time: we will start and end meetings on time
- Effort: we will complete all advanced planning and preparation for meetings

Team members will

- Listen to others and respect their opinions
- Be courteous (e.g. don't interrupt; notify team members of absence prior to meeting)
- Say what we think
- Stay focused on objectives
- Keep an open mind

2. Team Roles (Who will do what?)

The division of labor and delegation of responsibility within the group will follow from acceptance of defined roles and functions. For flexibility, members will not be restricted to duties of their assigned role. Here are examples of group roles:

- Project Coordinator: Chair meetings, prepare meeting agendas; coordinate and delegate activities, enforce work deadlines, lead effective meetings
- Communication (Secretary): prepare a written summary of meetings and distribute copy to each member within 48 hours; distribute report drafts and memos to each group member if needed
- Writer/Researcher(s): Obtain research materials and conduct interviews, develop abstracts, drafts, report to group members at each meeting.
- Editor(s): Compile and edit a final report for each phase of the project, submit a concise, proofread report, written in an appropriate style.
- Manuscript Publisher/Typist: Submit a professional and timely final report, and provide each member with a copy of the completed report.

APPENDIX 3

Role Assignment Exercise

This exercise demonstrates how to assign team roles and also highlights the contributions of different group member roles.

Step 1. Give the group an unstructured case (e.g., Part A of the *Anticipatory Case for Team Management*, by McConnell and Sasse, 1999). Do not provide any guidance on team roles. Say nothing about time limit. After ten minutes, ask them to stop, regardless of their progress. Many of the teams will have gotten sidetracked, or have spent too much time on the first questions; therefore they will not have completed all discussion questions.

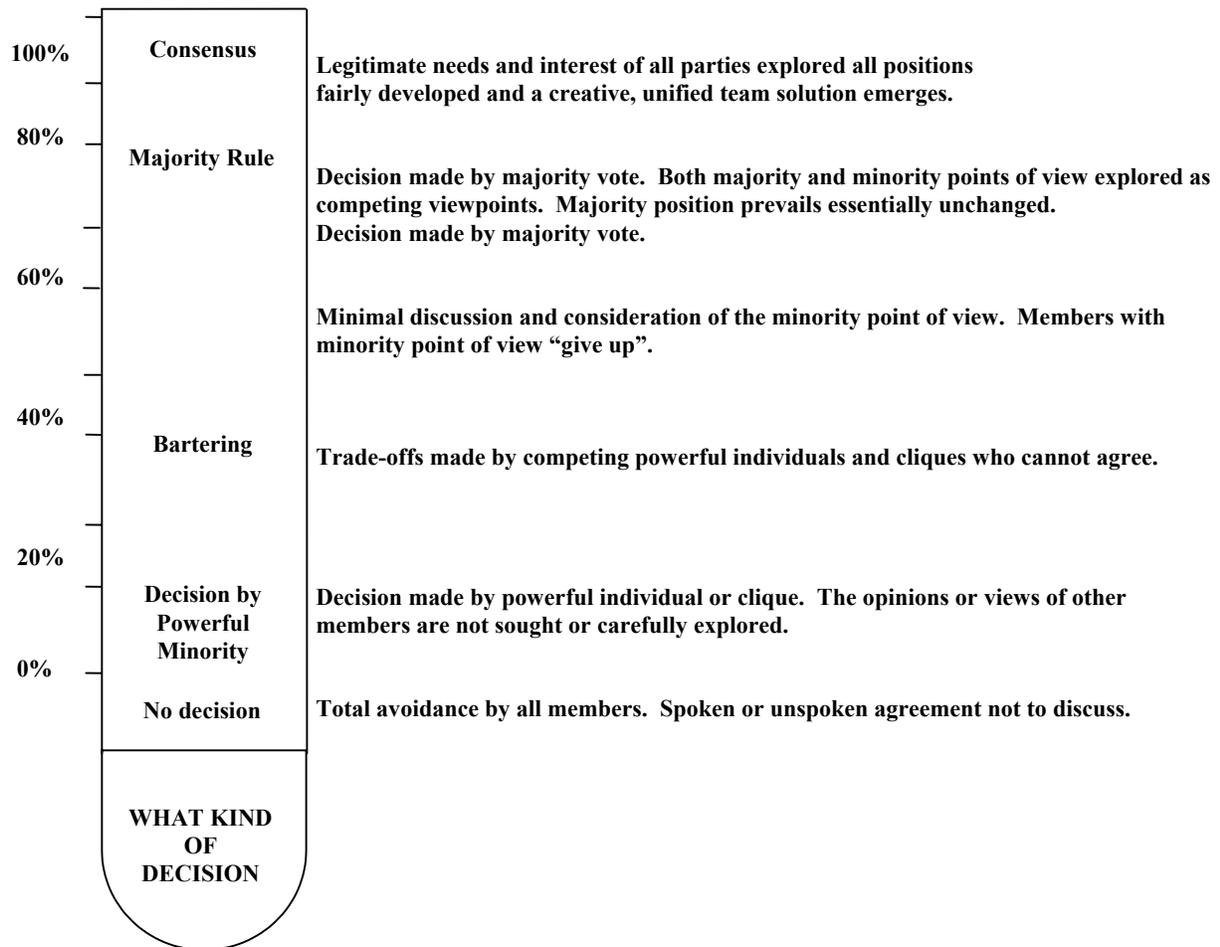
Step 2: Give them part B of the *Anticipatory Case for Team Management*, but this time use random assignment to give each member a role (see table below). Limit their time to 6 minutes.

Team Responsibilities	Team Member
1. Leader/coordinator (chair meetings, prepare meeting agenda)	Ron
2. Task leader (information and opinion giver, direction and role definer, summarizer, keep team on task, and on time)	Joe
3. Communication (scribe) Serve as recorder, prepare written summaries of meetings; distribute copies of meeting minutes and reports.	John
4. Social-emotional leader (alleviate frustration, resolve tension, and mediate conflicts)	Martha
5. Substitute function(s) of missing member(s)	Paul

After completing Part B of the *Anticipatory Case for Team Management*, discuss any changes in group behavior. Was the team more productive? More focused? More effective?

Step 3. Complete the *Anticipatory Case for Team Management* parts C and D. In part D students will share their personal and work characteristics, and then students will decide who takes which roles for the first outside-class assignment.

**APPENDIX 4
DECISION THERMOMETER**



APPENDIX 5. GROUP DEVELOPMENT CLOCK

