

Developing a training module for Endeavour volunteers on "Embracing diversity and building effective teams"

A Project for the AFP Fellowship in Inclusion and Philanthropy

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Background:

Endeavour Volunteer Consulting for Non-Profits (Endeavour) is a registered Canadian charity that provides management consulting to improve organizational capacity and community impact. Endeavour focusses on serving non-profit and charitable organizations that otherwise cannot afford professional consulting.

Every year, Endeavour operates two rounds of 6-month long consulting engagements. Every project team consists of 6-7 volunteers from diverse backgrounds and experiences who are typically meeting each other for the first time. During the 6 months, volunteers need to quickly build effective working relationships to successfully complete a pro-bono consulting project for a non-profit client. This initiative is to develop a training module that will be delivered during the orientation session to help diverse groups of volunteers work more effectively together.

Methods:

The methodology followed three phases: 1. Initiation and Planning, 2: Research and Analysis, and 3. Implementation. More details are provided below.

1. Initiation and Planning

- Consult with Endeavour executive team members to identify AFP Fellowship in Inclusion and Philanthropy project topic
- Review with AFP Fellowship in Inclusion and Philanthropy Program Manager to finalize project topic
- Develop and finalize work plan

2. Research and Analysis

- Survey past volunteers to:
 - identify learning needs
 - understand the challenges they faced during their volunteer experience in the context of working in teams
 - solicit their tips and tricks
- Conduct literature search on “Embracing diversity and building effective teams”
- Conduct any additional research required based on survey responses needs

3. Implementation

- Develop training module based on findings from Phase 2
- Write final report for AFP Fellowship in Inclusion and Philanthropy project
- Launch training with new Endeavour volunteers (March 2017)

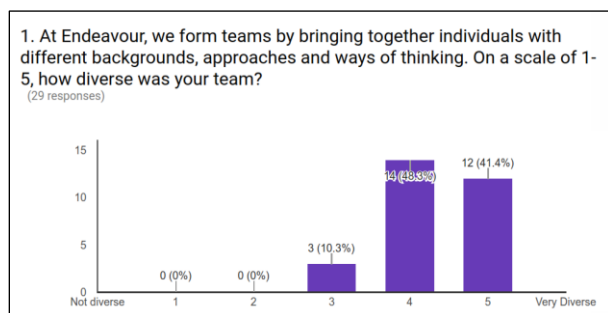
Results and Analysis

Volunteer Survey

A survey was distributed to volunteers who volunteered from August 2013 to August 2016 (refer to Appendix for survey question). The response rate for the survey was 17% with 29 responses received out of 169 surveys sent.

Key Findings

Over 90% of respondents felt that their teams were diverse (scoring 4 or 5 out of 5), with many commenting that it was a key benefit of the volunteering experience and a success factor to the project engagement. While the feedback was generally positive, not all respondents felt that their teams were effective in embracing diversity – 17% responded with 2 or 3 out of 5 for effectiveness.



“Diversity of experience and cultural background is a key benefit of the Endeavour experience.”

“Both teams I worked on were fairly diverse professionally (e.g. engineering, business, science, consulting, social work, law backgrounds).”

“I liked the team I was on - enough similarities that we could connect, but enough diversity to provide an enriching experience.”

“Had people that spanned marketing, IT, policy, and more. Various years of experience as well.”

Respondents identified various challenges and barriers that their teams encountered in creating an inclusive environment and/or building an effective team at Endeavour. Common challenges / barriers are summarized into key topics below.

Experience Level	<ul style="list-style-type: none"> • “Less experienced members felt intimidated, did not contribute as much to the engagement and /or were disengaged” • “One member tried to leverage his "vast experience in consulting" to force consensus”
Communication	<ul style="list-style-type: none"> • “Some team members would not listen and try and understand other member’s perspectives” • “Difficult to change mindset of the louder voices; less ideas generated due to time constraints or to avoid conflict” • “Different cultures/personalities behave differently in various situations and at times.”
Working styles	<ul style="list-style-type: none"> • “Managing the various expectations on our team. Some people wanted a faster pace, others preferred to think/talk things out over a longer period”
Sector differences	<ul style="list-style-type: none"> • “Coming from different sectors often we would be talking about the same thing but using different language, so it's taken time to make sure we all are on the same page about what we mean.”
“Politeness”	<ul style="list-style-type: none"> • “Since it was the first time people are working together, there appears to be a veneer politeness which inhibited the dynamics of pushing each other and pushing for better quality solutions or deliverables.”
Logistics	<ul style="list-style-type: none"> • General logistical challenges – scheduling meeting times, location

Respondents also provided strategies and methods they used to help create an inclusive environment and build an effective Endeavour team. These strategies have been summarized into themes in the table below.

Set expectations with a project charter	<ul style="list-style-type: none"> • “We discussed expectations with regards to how we will communicate, make decisions, and resolve disputes upfront”
Get to know each other personally	<ul style="list-style-type: none"> • “We had social team gatherings that helped to create a friendly and social environment” • “At the beginning of the engagement, we shared together as a group information from our personal lives to try and get to know each other better and understand where each of us was coming from.”

Facilitate respectful discussion and debate	<ul style="list-style-type: none"> • “Manager facilitate ongoing discussions during and in between meetings” • “Understanding that there is no right way to tackle a problem and listening to each other's rationale” • “Provide constructive criticisms on ideas and not people” • “Emphasis on structured meetings that allow every person in the group to speak”
Leverage and acknowledge skills of each member	<ul style="list-style-type: none"> • “Identify each individual's unique skill sets and experience; divide work based on the recognition of those skills.” • “Used the diversity to build bonds - i.e.: I asked people what they wanted to teach someone else (i.e. a skill/technical area they were strong in) and paired them with someone who wanted to learn”
Managers check in individually with each consultant	<ul style="list-style-type: none"> • “Made time to check in with each consultant individually. This allowed them to raise any potential issues - we could discuss before they became bigger problems.”

Literature Search

Research was conducted to identify best practices and evidence on embracing diversity and building effective teams. Key findings are highlighted below.

Google’s Project Aristotle

Google launched a venture in 2012 called Project Aristotle to identify how to build the “perfect team”. The research involved: 1. reviewing a half-century of academic studies on how teams work; and 2. studying 180 Google teams to figure out why some stumbled while others soared.

Researchers found that there were five dynamics that were significant for team effectiveness. Tips for managers and leaders to address each dynamic are listed below.



Source: rework.withgoogle.com

Psychological safety:

- Solicit input and opinions from the group.
- Share information about personal and work style preferences, and encourage others to do the same.

Dependability:

- Clarify roles and responsibilities of team members.
- Develop concrete project plans to provide transparency into every individual's work.

Structure & Clarity:

- Regularly communicate team goals and ensure team members understand the plan for achieving them.
- Ensure your team meetings have a clear agenda and designated leader.

Meaning:

- Give team members positive feedback on something outstanding they are doing and offer to help them with something they struggle with.
- Publicly express your gratitude for someone who helped you out.

Impact:

- Co-create a clear vision that reinforces how each team member's work directly contributes to the team's and broader organization's goals.
- Reflect on the work you're doing and how it impacts users or clients and the organization.

Of the above, psychological safety was discovered to be the most important dynamic of effective teams. The re:Work website has a number of tools to help foster psychological safety and help teams determine their own needs.

Mathieu and Rapp Research Study – Project Charters

In Mathieu and Rapp's 2009 article¹, it was highlighted that team effectiveness hinged on both taskwork (what it is that the team is doing), and teamwork (how the team is doing it with each other). Because team functioning depends on both teamwork and taskwork tracks, it is important that a solid foundation is established for each track during the early stages of team development. Mathieu and Rapp hypothesized that teams that produce high-quality teamwork (e.g. team charter) and taskwork (e.g. a performance strategy) plans early on will exhibit better patterns of performance over time.

The team charter exercise used in the study contained three sections:

¹ Mathieu, J. E., & Rapp, T. L. (2009). Laying the foundation for successful team performance trajectories: The roles of team charters and performance strategies. *Journal of Applied Psychology*, 94(1), 90.

- Section 1: Establishing team members' roles – Team members identifying individual business-related strengths and weaknesses, preferred work styles, availability in terms of hours and days, and contact information
- Section 2: How team would coordinate activities and interact in order to get work accomplished – timing and scheduling issues, backup and feedback mechanisms, how they would meet (e.g. face-to-face vs. virtually), and general work styles (e.g. how decisions will be made).
- Section 3: Plans for dealing with performance – positive and negative feedback.

A high-quality team charter was defined as those that were complete (thoroughness in completion each section and the depth of the answers) and consistent (ideas in different sections held together).

The study found that teams that developed high-quality team charters and performance strategies sustained levels of high performance throughout the simulation.

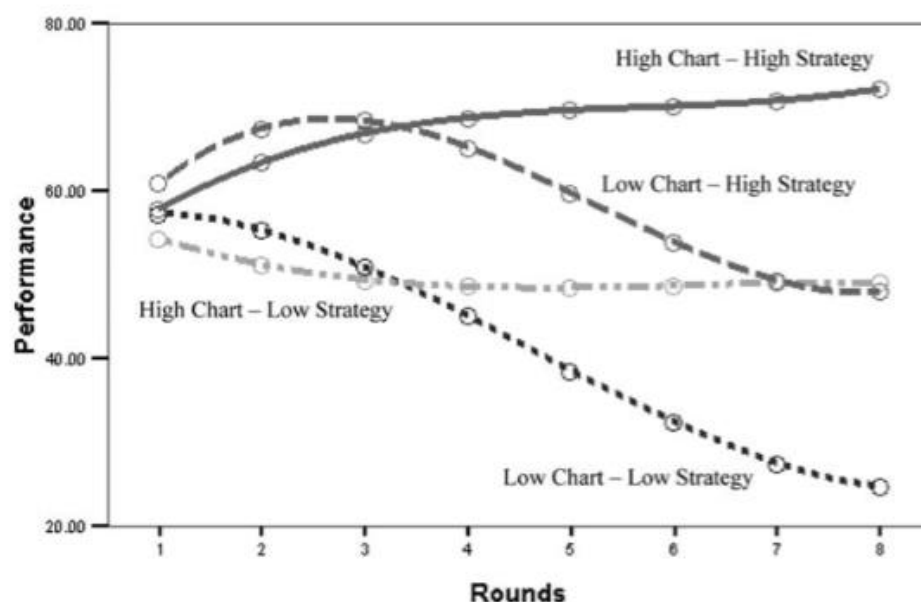


Figure 1. Team charters and performance strategies interaction as related to team performance trajectories.

Tuckman's Team Development Model

Bruce Tuckman's 1965 Team Development Model states that four phases were necessary for a team to develop and grow. At each stage, the dynamics of the team change from uncertainty and inefficiency to a stage of high performance. These changes are summarized in a table below. A fifth phase were added in subsequent years called "adjourning".

	Forming	Storming	Norming	Performing
General Observations	Uncertainty about roles, looking outside for guidance.	Growing confidence in team, rejecting outside authority.	Concern about being different, wanting to be part of team.	Concern with getting the job done.
Content Issues	Some attempt to define the job to be done.	Team members resist the task demands.	There is an open exchange of views about the team's problems.	Resources are allocated efficiently; processes are in place to ensure that the final objective is achieved.
Process Issues	Team members look outside for guidance and direction.	Team members deny the task and look for the reasons not to do it.	The team starts to set up the procedures to deal with the task.	The team is able to solve problems.
Feelings Issues	People feel anxious and are unsure of their roles. Most look to a leader or coordinator for guidance.	People still feel uncertain and try to express their individuality. Concerns arise about the team hierarchy.	People ignore individual differences and team members are more accepting of one another.	People share a common focus, communicate effectively and become more efficient and flexible as a result.

Source: Leadership Foundation for Higher Education, 2013

Understanding the stages of team development can empower teams to identify actions that will help them perform better.

Recommendations and Next Steps:

The findings from this report have been used to develop a training module (see Appendix) in collaboration with the Directors of Training and Development for the next Endeavour orientation session in March 2017.

Thank you to the Endeavour executives and volunteers for their support in developing this training module. Special thanks to the Directors of Training and Development, Anna Dopico and Natalie Dykes, for their assistance and input.

Appendix: Volunteer Survey

1. At Endeavour, we form teams by bringing together individuals with different backgrounds, approaches and ways of thinking. On a scale of 1-5 (5 = very diverse), how diverse was your team? *

Please provide any comments you may have: _____

2. Different experiences, backgrounds, and cultures can allow problems and challenges to be viewed from a wide-variety of lenses. Embracing diversity and creating an inclusive environment in which everyone feel valued and respected can help build effective teams. On a scale of 1-5 (5 = very effective), how effective was your team in embracing diversity? *

3. What did your team do to help create an inclusive environment?

4. What challenges / barriers did your team encounter in creating an inclusive environment and/or building an effective team?

5. How helpful were Endeavour's training sessions in preparing you to create an inclusive environment and/or to build an effective team? (On a scale of 1-5, 5 = very helpful)

Please explain _____

6. Please provide any recommendations you may have on how Endeavour's training sessions can help teams be more effective and / or better embrace diversity.

7. Which round(s) did you volunteer? Check all that applies: Round 13, 14, 15, 16, 17, 18

Appendix: Sample Team Charter

Project Name:	
Engagement Manager:	
Project Advisor:	
Project Team Members:	

Purpose of the Team Operating Agreement (TOA)

The purpose of the Team Operating Agreement is to serve as the guidelines and rules of the engagement to help the project team work effectively. The TOA is a living document and should be updated as required. Any updates will be discussed with and ratified by the project team members.

Team Goals

1. Create a supportive environment where reciprocal learning, teaching and coaching are encouraged.
2. Set challenging and realistic goals.
3. Seek a balance between client satisfaction and fostering the professional growth of individual team members.
4. Meet or exceed client expectations.

Work Approach

Engagement Manager

1. Ensures team input and contribution.
2. Ensures the team understands and maintains focus on the deliverables.
3. Ensures completion and approval of the Statement of Work (SOW).
4. Ensures the timely deliverable of work tasks as per the SOW.
5. Delegates tasks.
6. Tracks and reports progress.
7. Acts as the first point of contact for the team and client.
8. Raises issues as appropriate.
9. Approves changes as required.

Project Advisor

1. Guides and advises project team.
2. Monitors progress and identifies gaps.
3. Clarifies deliverables for the next meeting.
4. Evaluates the final report and presentation.
5. Approves the SOW.

Consultants

1. Develop the Team Operating Agreement.
2. Contribute to the development of the SOW.
3. Contribute to project deliverables.
4. Complete project tasks on time and on quality.
5. Present client deliverables as requested and appropriate.
6. Raise issues as appropriate.
7. Practice document version control for all documentation.

8. Notify Engagement Manager of any obstacles or potential obstacles preventing timely completion of client deliverables.
9. Inform Engagement Manager of the status of work deliverables and any problems/issues.

Team Communications

This section describes how the project team members will communicate with each other. It includes where project documents will be stored and how they may be accessed, how and when meeting agendas and minutes will be distributed, and how confidential information will be handled.

- The project's Endeavour Team Site will house the most up-to-date version of project documents.
- Contact information will be housed on the site. Each team member will ensure their information is updated.
- All documents created throughout the duration of this engagement will be uploaded to the site.
 - File naming convention:
 - [file name][version #, (or "Final" for final)][date]
 - Submissions to the Client and Project Advisor will be final versions, with all changes accepted and track changes turned off.
 - Master Document Holder (MDH): (to be assigned per deliverable)
 - One person shall be designated the MDH. Everyone else will email their individual document components to the MDH. These components are not considered drafts and will be deleted by the MDH once the changes have been incorporated into the main draft document.
 - It is the MDH's responsibility to ensure component deliverables are received on time, or address unresponsive team members as required.
- All e-mail correspondence between team members will have the following subject line naming convention:
 - "Endeavour:[Project Initials] - <Subject>"
- The meeting agenda will be determined by the Engagement Manager, with input from the team members, and e-mailed to project team members at least 24 hours prior to meetings. Meeting minutes will be shared via e-mail within 1 day.
- Team members will appreciate the sensitive nature of information discussed during this project and will share with care. Where applicable, documents will include a footer indicating that information is confidential.
- "Sidebar" conversations between team members during team meetings will not be allowed.
- All communication will be open and courteous. No "overtalking" or interrupting.
- No texting or use of electronics will be allowed during meetings.
- Team members will keep each other informed.
- All ideas are welcome and will be discussed on its merits.
- The ORID framework will be used for communication breakdowns. The following steps are used in the ORID framework:
 - 1) Declare breakdown;
 - 2) Describe the situation or feeling (i.e. "I'm frustrated because");
 - 3) State what needs to be done;
 - 4) Discuss solution;
 - 5) Agree, decide to park and move on, or escalate as required.
- Communications are confidential.

Decision Making

This section describes how project team members will make decisions. Everyone must agree on how decisions will be made to ensure that everyone can live with the decisions made and to ensure that the project can move forward. This section can include guidelines for voting on decisions, how decisions will be documented, definitions of key terms, and what happens if the team cannot come to a decision (for example, escalation to the project sponsor or to a governing body).

The team will try to achieve consensus on decisions. Consensus means that everyone can live with the decision. It doesn't mean everyone has to agree 100%.

Decisions will be made as needed, regardless of attendance. Key decisions will be reviewed at the following team meeting if there are absent team members.

Team members may abstain from voting.

The Engagement Manager will have final approval of team decisions. In case of a conflict, the Engagement Manager will serve as final arbitrator. Every attempt to maintain Team Goals as outlined previously will be made.

All client work package / deliverables will be approved by the Engagement Manager.

Final client deliverables (such as the SOW) will be reviewed and approved by the Project Advisor prior to the Engagement Manager's approval.

Changes to the SOW after acceptance by the client will require change management documentation and approval.

Meetings

This section establishes how project team meetings will function. It addresses what will generally happen at meetings, sets attendance expectations, and establishes who will be responsible for the facilitating, frequency, and scheduling of meetings.

- The team will meet [on a certain date and time] every [frequency] (or as required).
- Meetings will be conducted in-person and/or via conference call.
- Issues, risks, change requests, and action items will be reviewed and updated at each meeting.
- Leaders of each particular workstream will report status at each team meeting.
- During each meeting, a "parking lot" will be used to record topics that require discussion at a later date.

Each meeting will have a facilitator. Team members will accept the facilitator's decision to table or park discussion topics. This facilitator will be responsible for:

- Keeping the meeting on track and adhering to the meeting agenda.
- Ensuring that minutes are taken.
- Ensuring that the next meeting's facilitator is assigned.
- Minute takers and timekeepers will be assigned for each meeting.
- Minute takers will capture accurate minutes and distribute the minutes within 24 hours of the meeting.
- Meetings will start and end on time. Team members will attend meetings in person when feasible. A dial-in number will be available for remote attendance.
- Any team member who knows they will be absent for a meeting will inform the team of their absence and provide any required input for the meeting by e-mail beforehand.
- Any team member who misses a team meeting and does not inform the team beforehand will provide their input to the meeting by e-mail after the meeting.

- Meetings will occur regardless of whether some team members are absent. It is the responsibility of each team member to stay current on the project team activities and follow up for any assigned work, even when he or she has missed a meeting.
- Meeting discussions are to be focused and action-oriented with alternative views to be evaluated.

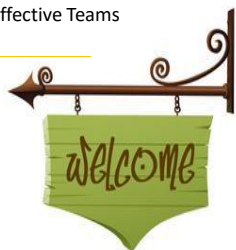
Personal Courtesies

This section outlines the personal courtesies that team members will extend to one another. Do not assume that personal behaviours are understood.

- Each team member represents a specific area of expertise or business unit. Team members will bring their individual perspectives to the team and will also consider what is best for the organization.
- All cell phones and other communication devices must be silenced during meetings and used on an exception basis only.
- All team members will be punctual.
- All team members will come prepared and contribute.
- Have fun.
- Be respectful.

Appendix: Training Module

Embracing Diversity and Building Effective Teams



2016 Endeavour Volunteer Survey

- Endeavour volunteers → diverse backgrounds meeting each other for the first time
- Volunteers need to quickly build effective working relationships to complete their project

Endeavour volunteers from 2013-2016 were surveyed to:

- Identify best practices on embracing diversity and building effective teams
- Identify training needs to help the teams embrace diversity and be effective

Endeavour Values Diversity

Both teams I worked on were fairly diverse professionally (e.g. engineering, business, science, consulting, social work, law backgrounds).

I liked the team I was on - enough similarities that we could connect, but enough diversity to provide an enriching experience.

Over 90% of respondents felt that their teams were diverse (scoring 4 or 5 out of 5)

- Oct 2016 survey to volunteers from Aug 2013 – Aug 2016

Had people that spanned marketing, IT, policy, and more. Various years of experience as well.

Diversity of experience and cultural background is a key benefit of the Endeavour experience.

Dimensions of Diversity

Our dimensions of diversity:

- Affect how we define ourselves.
- Have an impact on how we see others.
- Inform our behaviour

Question to the group:

What are some of the dimensions of diversity?

Dimensions of Diversity



15 min Exercise: In your teams, discuss how 2-3 of these dimensions have impacted your relationships with others (within your workplace or outside)

Diversity and Inclusion (D&I)

Question to the group:

What is the difference between Diversity and Inclusion?

Diversity and Inclusion (D&I)

Diversity is the mix

Inclusion is getting the mix to work well together



Effective Teams – D&I

There is a clear business case for diversity!



Diversity Relates to Workgroup Performance

Boehm, S. A., Diermann, D. J., Kunze, F., Michaelis, B., Parks, K. M., & McDonald, D. P. (2014). Expanding insights on the diversity climate-performance link: The role of workgroup discrimination and group size. *Human Resource Management*, 53(3), 379-92.



Working in Diverse Teams - Challenges

Logistics	<ul style="list-style-type: none"> General logistical challenges – scheduling meeting times, location
Experience Level	<ul style="list-style-type: none"> "Less experienced members felt intimidated, did not contribute as much to the engagement or were disengaged" "One member tried to leverage his 'vast experience in consulting' to force consensus"
Sector differences	<ul style="list-style-type: none"> "Coming from different sectors often we would be talking about the same thing but using different language, so it's taken time to make sure we all are on the same page about what we mean."
Working styles	<ul style="list-style-type: none"> "Managing the various expectations on our team. Some people wanted a faster pace, others preferred to think/talk things out over a longer period"



Source: Endeavour 2016 survey responses

Working in Diverse Teams - Challenges

Communication	<ul style="list-style-type: none"> "Some team members would not listen and try and understand other member's perspectives" "Difficult to change mindset of the louder voices; less ideas generated due to time constraints or to avoid conflict" "Different cultures/personalities behave differently in various situations"
"Politeness"	<ul style="list-style-type: none"> "Since it was the first time people are working together, there appears to be a veneer politeness which inhibited the dynamics of pushing each other and pushing for better quality solutions or deliverables."



Source: Endeavour 2016 survey responses

Working in Diverse Teams

In your groups, discuss:

- What ideas do you have to address some of the challenges identified by past Endeavour consultants when working in diverse teams?

10 minutes



Effective Teams

Google Project Aristotle

<ol style="list-style-type: none"> Psychological Safety Team members feel safe to take risks and be vulnerable in front of each other. Dependability Team members get things done on time and meet Google's high bar for excellence. Structure & Clarity Team members have clear roles, plans, and goals. Meaning Work is personally important to team members. Impact Team members think their work matters and creates change. 	<ol style="list-style-type: none"> Most Important <ul style="list-style-type: none"> Solicit input and opinions from the group. Share information about personal and work style preferences, and encourage others to do the same. <ul style="list-style-type: none"> Clarify roles and responsibilities of team members. Develop concrete project plans to provide transparency into every individual's work. <ul style="list-style-type: none"> Regularly communicate team goals and ensure team members understand the plan for achieving them. Ensure your team meetings have a clear agenda and designated leader.
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Sources: 1. reworkwithgoogle.com; 2. Duhigg, C. (2016). What Google Learned From Its Quest to Build the Perfect Team. Retrieved September 21, 2016

Effective Teams

Strategies shared by past Endeavour Consultants

Set expectations with a project charter	<ul style="list-style-type: none"> “We discussed expectations with regards to how we will communicate, make decisions, and resolve disputes upfront”
Get to know each other personally	<ul style="list-style-type: none"> “We had social team gatherings that helped to create a friendly and social environment” “At the beginning of the engagement, we shared together as a group information from our personal lives to try and get to know each other better and understand where each of us was coming from.”
Managers check in individually with each consultant	<ul style="list-style-type: none"> “Made time to check in with each consultant individually. This allowed them to raise any potential issues - we could discuss before they became bigger problems.”



Source: Endeavour 2016 survey responses

Effective Teams

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Leverage and acknowledge skills of each member	<ul style="list-style-type: none"> “Identify each individual's unique skill sets and experience; divide work based on the recognition of those skills.” “Used the diversity to build bonds - i.e.: I asked people what they wanted to teach someone else (i.e. a skill/technical area they were strong in) and paired them with someone who wanted to learn”



Source: Endeavour 2016 survey responses

Effective Teams – Project Charter

Teams that developed high-quality team charters and performance strategies sustained levels of high performance throughout the simulation

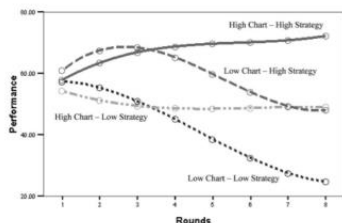


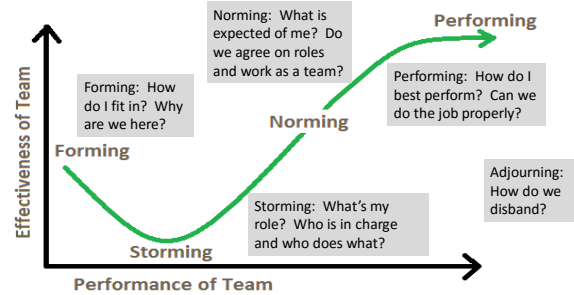
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Mathieu, J. E., & Rapp, T. L. (2009). Laying the foundation for successful team performance trajectories: The roles of team charters and performance strategies. *Journal of Applied Psychology*, 94(1), 90.



Effective Teams - Stages

Tuckman's Team & Group Development Model



Team Breakout Session

Build your team charter!

