Team Building for HPN & Education Teams
Report for Phase Four (November – December 2007)
(including an Annex containing all documents produced)
FINAL REPORT
Submitted on: December 22, 2007
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To: Akua Kwateng-Addo, HPN Team Leader and CTO

Background

A sixth technical assistance consultancy was scheduled for November-December 2007 as part of the final Phase Four of the team strengthening contract. A brief overview of the three previous phases is included below drawing on descriptions from previous reports (see Annex for more details on each Phase):

Phase One: Two visits had been effected under Phase One in June, 2005 and the following July that brought together the team under its new Team Leader, established new and clarified Roles & Responsibilities and identified areas where additional personnel were needed in light of expanding SO13 responsibilities. Also, at the end of the July consultancy, a combined SO13 and SO14 meeting was convened to discuss a new roll for the General Development Office (GDO) as it underwent leadership changes.

Phase Two. For the November of 2005 consultancy, Andrew Gilboy continued as lead trainer and performance specialist with support a second consultant, Dick Wall, an expert in team building, facilitation and work-place communication. The focus shifted *from* SO13 itself *to* SO13 *and* the Implementing Partners managing its two major activities (COMPASS and ENHANSE).

Phase Three. A fourth and fifth technical assistance consultancy were scheduled for September 2006 and August 2007 as part of "Phase Three" to continue work as described in the Scope of Work. Phase Three shifted the focus back to the team, after having improved communication with external stakeholders (primarily the IPs) in Phase Two. As relations with IPs and other USAID SOs normalized in 2006-2007 compared with Phase Two, and with significant changes in team composition in full swing, finding solutions to internal challenges was priority over reaching further out to Nigerian NGO and GON counterparts.

This report consists of a brief narrative describing the activities and accomplishments of Phase Four followed by an Annex containing handouts and documents used during the team retreat held.

The objectives as they appear in the original SOW are repeated below for ease of reference.

Objectives for all Phases

1. Lead the SO13 team to a common understanding of its strategic objectives and how they can be reached now that the Implementing Partners (IPs) are in place and other cooperating partners (United States Government and Nigerian) are fully engaged,

2. Help the SO13 team members clarify and allocate their roles and responsibilities vis-à-vis the new implementation structure taking shape,

3. Integrate performance monitoring into the team's responsibilities and set the stage for its implementation,

4. Build improved communications between the SO13 team and its outside implementing and cooperating partners,

5. Facilitate common agreements and understanding among USAID's partners to help achieve jointly-held results,

6. Identify ways to resolve selected problems that impede performance among the partners. "

Key Words Reflecting the Team's Hopes in May 2005

- Performance – integration
- Common understanding – ownership
- Roles & Responsibilities – clarification, allocation
- Integration – SO 13 (RP/CS/Educ)
- Communication
- Working with Partners
- Problem Solving
- Implementation
- Team Charter

Objectives for Phase Four

The objective for Phase Four was to solidify the gains made during the previous phases by focusing on tools that the team could use and to prepare for a number of major changes the team would face in 2008. There were also several new team members to bring into the group (the General Development Officer and Education Officer) as well as a new Mission Director. By the end of Phase Four, the team would be able to identify all the major changes for which it needed to begin preparations and the actions needed to maintain team strength as it faces the new year.

As a final output from Phase Four, the team would also have a plan to update the Team Charter with assistance from the facilitator.

Descriptions of the Facilitated Sessions Held During Phase Four:

Introductory Session on MCH with Implementing Partners for Northern Initiatives: November 27, 2007

A special half-day meeting was called on Day Two of Phase Four to bring together USAID's IPs dealing in RH/MCH and two U.S.-based health experts on a short-term visit to Nigeria tasked with helping the Mission design new and/or expanded activities for the North. During the session, facilitated by Andrew Gilboy, Joyce Holdfeld and Patricia MacDonald were able to gather information directly from the IPs on their successes, disappointments and observations with activities they have been managing in the Northern states for USAID. The session fit conveniently with the team strengthening objectives to continue to clarify key roles and responsibilities in RH programming and to enhance communication across health and education sectors by allowing the IPs to describe their activities. The objectives of the meeting were to identify ...

- lessons learned from FP/RH implementation in the North,
- opportunities to expand and address unmet needs, and
- examples of integration of FP with other services.

A typed version of the flip charts produced and notes taken during the session is included in the Annexes.

Team Retreat: December 6, 2007

A full-day off-site meeting was held with the full team (minus two (Karla and Abdoulaye) who were unable to attend. As with previous retreats, the objectives and agenda evolved from private, confidential interviews the facilitator held with each team member. The retreat objectives were then presented to the team for approval or modification on the morning of the retreat.

The objectives developed were:

- identify the changes anticipated for next year that will affect us

- decide on steps to take to help us ensure a strong team through the changes

- take the team’s temperature and decide on ways to keep healthy

- state the role of the Team Charter in maintaining the team’s health and list the steps needed to finalize the Charters

In order to place "change" in a proper perspective, the team developed a list of factors that are associated with "change" in general or that will affect the team:

- New people to integrate into the team (or to interact with outside the team)
- Uncertainty
- Beyond the control of the team
- Destabilizing / traumatic
- Has positive as well as negative aspects
- Some thrive on change – others don't
- Change is constant

While discussing how change affects the team, several members coined **new words** either by accident or design, that could characterize some of their frustrations about dealing with changes:

- *disstressful* was used either as a mistake or intentionally, but it cleverly combines two major elements surrounding change: *stress* and *distress*.

- *Obstacular* – an adjective coined to describe certain people who did little to further an administrative process to completion preferring to put forth obstacles rather than solutions.

The rest of the morning consisted of eliciting from the team the programmatic changes that they knew the team would need to face in the next calendar year. The list (see Annex) included all activities that were either new or expanded. The team then assigned a rating of 1 to 3 that represented the degree of management burden that each change would bring. The ratings are found in the column next to each entry in the Annex. This exercise served to a) encourage individual team members to assess how each change might affect their work, b) stimulate an open discussion about the changes themselves (likelihood of each one occurring, funding constraints, AID/W trends affecting the changes, etc.), c) assess the impact on the team as a whole the changes would have, and d) help the team prepare for 2008.

As the team discussed its list of changes and attributed the ratings, it became clear that a major event anticipated in 2008 – the new Mission Strategy – was not sufficiently understood by the team members. Yet with the year approaching and certainty that the Front Office would need the help of both the HPN and Education Teams, what input would be required from the team and how could it plan? The group then brainstormed on the key benchmarks that would have to be met in order to complete the strategy and begin implementation by CY 2009, the year when most current activities are scheduled to end. A timeline was developed, shown below, that helped clarify the major demands that would be made on the team:

Jan 08	*June 08*	*Oct 08*	*Jan 09*	*June 09*
Cross-Sector Focus Groups Evaluations Reviews	Drafting Strategy	Possible Move Drafting of Procure. Docs	Procurement Process	Implementation

The above timeline and associated team (and Front Office) responsibilities helps clarify what will be needed in terms of HPN and Education data and input into the new strategy. Even though it is too early to know precisely what will be expected, the team needed to visualize the possibility of diversion from their programmatic management responsibilities to be able to feed into the overall future Mission strategy, especially for health and education. The Mission Director's timely arrival at this point in the discussion provided all an opportunity to better understand the process and the needs of the Front Office.

With the new GDO present for the retreat, the team was able to brainstorm on ways in which a revitalized GDO could be formulated with support from all three teams (HPN, Education and HIV/AIDS & TB). The new Mission title that replaces the former "GDO" is "Investing in People" and presents the team with an opportunity to build new synergies across sectors within the teams, and across the teams themselves. This discussion was the first occasion where two of the three IIP teams could brainstorm about this Mission configuration and what it means to the performance, roles and responsibilities of the members. The desirability of remaining an "integrated health and education team" was discussed now that the two teams are officially separated. (The original team definition of "integration" from 2003 is included in the Annex as a baseline of the evolution of this term.)

After lunch, the team undertook the "team health" exercise for the second time, having learned about this useful team strengthening tool at the September 2006 retreat. The same questionnaire was again used (included in the Annex) and tallied using the same procedure. The team then assessed the anonymous scores and compared them to the ratings from 2006.

Several points emerged :

- The exact totals should be used rather than the rounded averages (as had been done in 2006) since rounding shielded some important nuances
- Although the scoring was lower, the team did not generally feel that this reflected poorer health of the team; rather, it could reflect a heightened sense of criticism of team members on themselves; or a more realistic set of expectations of what a team could produce
- The scores were in fact very high, averaging over 5 of 7 possible points, well above the median 3.5 points. This overall view was occasionally lost as the team scrutinized itself with each "health factor".

- The range of scores within each factor again proved a rich element of this exercise; it reveals a range of views among the team that can be discussed, and that is easily hidden by looking only at the averages.
- Not all the factors should be considered with the same degree of importance; some factors the team will feel more important than others during certain periods, while others will emerge as key during other periods.

Having completed the health update twice, the team could now plan to use this tool periodically as a useful method to assess the team's health objectively, anonymously and consistently. It is also an effective way to stimulate discussion on the eight factors generally associated with a healthy team.

One of the more irritating and wasteful aspects of modern organizational culture is the pervasive use and reliance on emails. This new communication device has caused considerable havoc with many teams despite the revolutionary changes emails have brought to contemporary management and communications, especially internationally. No one seriously suggests eliminating this tool because it is challenging to manage and threatens performance when misused. But how to manage emails to the benefit of individual and team performance is the key question.

A one-hour session was held to elicit the effect of emails on the HPN and Education teams and to develop internal protocols that may improve the situation. The first part consisted of noting the major irritants, most of which are listed in the " Tips for Managing Emails" in the Annex. Only a few of these annoying email practices escaped the team as it shared stories of how emails can disrupt work life and impede performance.

Once the negatives were processed, the team turned to sharing ideas on how to improve email management. The useful list includes tips such as limiting emails to short messages no longer than computer screen and reducing the number of times emails are checked during the day. It was recommended to turn off the sound alert for incoming emails so as not to interrupt team members trying to complete important tasks that required concentration.

Given the interest shown by the team in this session, and the tips discussed, the team should revisit this topic at the next retreat to determine which of the tips the team was adopting and the impact observed. The team can, if it wishes, consider a more formalized email protocol that would help team members conform to email etiquette that would enhance team health and communication and minimize irritation and information overload.

Updating the Team Charter was the main subject that appropriately closed out the final phase of the team strengthening technical assistance contract. The chief characteristics of a team charter were discussed and an action plan adopted to move towards a charter that reflected the major improvements that the team had registered since the beginning of the technical assistance in 2005. One team member (Garba Abdu) volunteered to be the Principal Coordinator who would oversee the process to update the charter before the next team retreat. The facilitator agreed to send him drafts of other Team Charters and some additional information that could be included in the draft.

A short session was conducted at the end of the retreat to share impressions of the technical assistance contract and its impact on the team over the 30 months of work. Although time did not permit a more formal evaluation, many team members spoke of the benefits of the type of assistance provided, in particular the role played by an independent, objective outside performance consultant, who conducted frequent in-depth interviews of team members over time upon which the team retreats were designed. It was suggested that a brief article be written that captures the major elements of this type of team strengthening for other USAID teams to consider, which the facilitator agreed to drafting after all deliverables were submitted.

# # #

ANNEX

DOCUMENTS PRODUCED DURING PHASE FOUR

- SO13 Team Building Contract: Original SOW
- Technical Assistance To Build Team Strength: Summary of Phases
- HPN & Education Team Retreat Agenda, December 6, 2007
- HPN & Education Team Retreat Objectives, December 6, 2007
- Program Changes Anticipated in 2008 and Impact on Team
- Management changes in 2007 and 2008
- Investing in People Team Positions (HPN & Education)
- "Taking the Temperature of My Team" – questionnaire
- Tally Sheet from Questionnaire (Dec 07 and Sept 06 compared)
- Team Charters: Key Characteristics
- FAQs on Team Charters
- Definition of "Integration" from GDO Team Meeting in 2003
- Tips on Managing E-Mail

SO13 Team Building Contract: Original SOW

Phase 1: SO13 Team Strengthening

Target Audience: SO13 Team

Outcomes:
- Develop an agreed upon management approach for the integrated health and education programs (COMPASS and ENHANSE)
- Consensus on major objectives for next 3, 6, 9, and 12 months,
- Master list of major activities needed to be completed to reach the objectives,
- Allocation of roles and responsibilities (R&Rs) among team members,
- Modified or new "job descriptions" and the Computer Aided Job Evaluation (CAJE) documentation,
- Assist in the review/revision of the Team Charter.

Phase 2: Consolidating Internal Realignment and Building Bridges to External Partners

Target Audience: SO13 and Implementing Partners and Identified Nigerian NGOs

Outcomes:
- Review of program begun in Phase 1 to realign team Roles and Responsibilities,
- Improved understanding of common objectives,
- Recognition of respective interests and pressures from different partner organizations,
- Agreement on a workable plan to overcome constraints in the short and medium term,
- Improved mechanisms to communicate across organizational and functional lines,
- A way to measure the level of coordination and communication occurring among target organizations.

Phase 3: Strengthen the involvement of Government of Nigeria (GON) and NGO partners

Target Audience: 1) GON agencies   2) NGOs not already partners with the IPs

Outcomes:
Note: Although the objectives and interests of the GON and Nigerian NGOs should be already integrated into the Work Plans and activities being undertaken by all partners in the USG group, the probability is that due to the significant change in direction, size and implementation of USAID's SO13 activities, this coordination may not be realized. The activities of Phase 3 will therefore focus on ensuring that Nigerian organizations are fully involved.

- Improved knowledge of USAID's programs on the part of the GON and NGOs,
- Input from Nigerian partners as to the program's direction, impact, etc.,
- Assessment of progress toward meeting program objectives.

<u>Phase 4: Integrating Health, Education and HIV/AIDS &Tuberculosis (SO13 and SO14): Review of Programs</u>

Target Audience: SO13 and SO14 Teams, IPs

Outcomes:

- Review of Team Charters with SO13 and SO14 members, looking for integration points,
- Identify specific areas/activities to facilitate integration of interventions,
- Develop integrated intervention plans for specific activities (to include IPs),
- Final review/revision of SO13 Team Charter.

TECHNICAL ASSISTANCE TO BUILD TEAM STRENGTH
(Contract for TA Services of Andrew Gilboy)

UPDATE
December 6, 2007

Phase One, Trip One: **May 05**

Established draft "Vision" Statement: *Nigerians living healthy and educated lives*
Defined initial group of R&Rs across functional areas
Assigned CTO/AM responsibilities

Phase One, Trip Two: **July 05**

Validated and completed allocation of R&Rs
Decided on new Positions needed and rationale
Assembled information needed to process new PDs and update current ones
Discussed GDO with SO14

Phase Two: **November 05**

Reaching out to strengthen relationships with COMPASS & ENHANSE
Developed Action Plan to implement changes in team
Refined R&Rs further for submission to EXO

Phase Three, Trip One: **September 06**

Welcomed 3 new team members into team-building strategy
Shared current and changed Roles & Responsibilities
Conducted health check-up of team and analyzed results
Improving our relationships with IPs
Conducted 2nd meeting with COPs/DCOPs of major IPs: COMPASS, ENHANSE, SFH

Phase Three, Trip Two: **August 07**

Review of Roles & Responsibilities
Medical examination of Team's Health
Improving team relationships with IPs (via SO13/ meeting with IP/COPs)

Phase Four (final): **Nov-Dec 07**

Preparing for Changes in the Transition Year – 2008
Taking the Team's Temperature (2nd time)
Team Charters
Performance Improvement Tool: Email
Review of Team Building Results

Health and Education Team Retreat

Thursday, December 6, 2007

HPN Team Leader:	Akua Kwateng-Addo
Education Team Leader:	Sandy Ojikutu
Facilitator:	Andrew Gilboy

9:00 – 5:00

A G E N D A

WELCOME

I. Review of Phases of Team Building Contract

II. Objectives and Agenda for the Day

III. Team Responsibilities in a Transition Year: 2008 (Part One)

IV. Team Responsibilities in a Transition Year: 2008 (Part Two)

LUNCH

V. Taking the Temperature of the Team

VI. Team Charters – what can they do for the team?

VII. Performance Improvement Tool: Managing Email

VIII. Recap of the Day

IX. Review of Team Building Results since May 2005

Health and Education Team Retreat

Thursday, December 6, 2007

HPN Team Leader:	Akua Kwateng-Addo
Education Team Leader:	Sandy Ojikutu
Facilitator:	Andrew Gilboy

9:00 – 5:00

OBJECTIVES

By the end of the day, the team will be able to ….

- identify the changes anticipated for next year that will affect us
- decide on steps to take to help us ensure a strong team through the changes
- take the team's temperature and decide on ways to keep healthy
- state the role of the Team Charter in maintaining the team's health and list the steps needed to finalize the Charters

Program Changes Anticipated in 2008 and Impact on Team

The following were put forward by the Team as the most important program-related changes they foresaw having to address in CY 2008. The right column indicates the rating given by team consensus after discussion. The rating description is:

1 = **"can manage"** (team can manage this program change without any additional resources)

2 = **"can manage with TA and/or TDY"** (team can manage this change but only with additional technical assistance (PSC, contract, etc.) support and/or TDY support primarily from AID/W, of a temporary nature)

3 = **"cannot manage without permanent additional resources"** (team would need more permanent members to manage this program change)

Anticipated Program Change in 2008 and Impact on Team	**Rating**
Sesame Street	1
Exxon-Mobil Malaria GDA	1
Long Lasting Insecticidal Bednets for Nigeria	1
PEPFAR Wrap-arounds	1
New Partnerships Initiatives (for RH)	1
President's Education Initiative (PEI)	1
Northern Education Initiative	1
State Education Accounts (SEA)	1
Closure of programs	1
New Mission Strategy	2
Preparation and Review of Program (for new Mission Strategy)	2
DHS and EdData	2
Northern Nigeria Platform	2
Niger Delta (Embassy emphasis)	?
RH Plus-Up	2
MCH Plus-Up	2
President's Malaria Initiative (PMI) (also rated "3" by some team members)	2
Start-up of Programs	2
Higher Education Initiative	3

Management Changes in 2007 and 2008

(Recent changes or those anticipated for 2008 put forward by the team)

- New Mission Director
- New Deputy Director
- New General Development Officer
- New HPN Team Leader
- New Contracting Officer and Regional Legal Advisor
- New Ambassador and other USG personnel
- New Team members (5 estimated: 3 in HPN and 2 in Education)
- Space modifications in existing location
- Move to a new location (co-location in new Embassy)
- TDY visits (with accompanying increased work load on team)
- Increased inter-agency collaboration expected

Investing in People Team Positions (HPN & Education)

IIP Coordinator (GDO)

HPN Team

Team Leader
Deputy Team Leader
Senior Program Mgr. Reproductive Health
Program Mgr Reproductive Health
Program Assistant
Senior Advisor, Child Survival
Program Mgr, Child Survival
Senior Immunization Advisor
Program Mgr, Maternal & Child Health
Office Manager
Program Mgr, Avian Influenza

Basic Education Team

Team Leader
Deputy Team Leader
Senior Program Mgr Education
Program Assistant

Extended Team

Team members from :

- Contracting Office
- Financial Analyst
- Executive Office
- Program Office

Taking the Temperature of My Team

1. Goal Setting

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Team or work unit goals set for us from above

Goals set by team, emerging through team interaction and agreement.

2. Participation

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

One or two people dominate, others are silent or respond minimally

All team members actively participate as the need arises

3. Feedback

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Little or no sharing about how well members are working together, or how they affect team or work unit effectiveness

Members ask for and give feedback freely and share how they stand with one another and how well they are contributing to team or work unit effectiveness.

4. Decision-making locus

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Influential few push through decisions; decisions made by unit manager or supervisor

All members are encouraged to participate in decisions; full agreement of team is sought

5. Distribution of Leadership

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Much dependence on one or two members or leaders to get things done; others “wait and see” without much involvement

Leadership distributed and shared among team members; individuals contribute when their resources are needed

6. Problem solving

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Little or no attempt to Look at team issues or Problems; no real Diagnosis of forces affecting work unit functioning

Team diagnoses problems and team issues, critiques its own effectiveness and all the forces affecting team functioning

7. Handling team conflicts

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

No tolerance for expression of negative feelings or confrontation; conflicts suppressed or “swept under the rug”

Negative feelings and tensions surfaced and confronted within the team; conflict seen as potential source of creative team effort

8. Using resources of team members

Now	1	2	3	4	5	6	7
Would like	1	2	3	4	5	6	7

Talents, skills, and experience of team members not identified, sought, or given recognition

Talents, skills, and experience of team members are fully identified, recognized, and used whenever appropriate

TAKING THE TEMPERATURE OF THE TEAM
Tally Sheet from Questionnaire
December 6, 2007

	Factor	Scores	Average
1	Goal Setting	7,4,5,3,5,5,6,5,5	5.0
2	Participation	7,7,5,4,6,5,7,4,5	5.5
3	Feedback	6,7,4,3,4,5,7,3,4	4.7
4	Decision-making locus	5,7,4,3,4,5,6,3,4	4.5
5	Distribution of Leadership	6,7,4,3,6,6,6,3 (8 respondents)	5.125
6	Problem Solving	6,5,5,4,7,7,5,5 (8 respondents)	5.5
7	Handling Team Conflicts	6,5,3,4,5,7,4,5 (8 respondents)	4.875
8	Using Resources of Team Members	6,6,4,3,6,6,6,5,5	5.22
	TOTAL		5.05

Tally Sheet from September 2006

	Factor	Scores	Average
1	Goal Setting	6,6,6,5,4,6,3,4,6	5
2	Participation	7,6,6,6,5,6,5,7,6	6
3	Feedback	3,7,6,4,5,4,6,6,4	6
4	Decision-making locus	6,4,5,6,5,6,4,6,6	5
5	Distribution of Leadership	6,6,5,5,6,7,4,5,6	6
6	Problem Solving	6,6,5,5,5,5,5,5,5	5
7	Handling Team Conflicts	7,6,4,6,3,6,6,5,5	5
8	Using Resources of Team Members	7,6,4,7,4,7,4,7,6	6
	TOTAL		5.5

Team Charter

Characteristics:

Blueprint – road map
Agreement / Guidelines
Procedures and Operational Framework
Living document
Flexible
Easy to modify
Common focus
Shared vision

Values and Norms:

The following should be addressed in the Charter:

Active Listening
Decision-making
Delegation of Authorities
Conflict resolution
Primary Responsibilities: XY – BC
Secondary responsibilities: BC – XY
Unsolicited proposals
Proposal development
GDA
Review draft approval documents

FREQUENTLY ASKED QUESTIONS
About Team Charters

Compiled by:
Andrew Gilboy, Consultant to USAID/Nigeria
August 30, 2004

Note: I decided to use the informal Q&A format to help other USAID/Nigeria SO Teams understand the *process* of developing a Team Charter. I have not covered all aspects but it's a start anyway.

Q1: What is a Team Charter?

A: Ideally, a Team Charter ("TC") is a record of a series of decisions team members have made about how they will work together. However, some people view it as an administrative task – a document – to produce without going through the process.

Q2: Why take the time to produce a Team Charter?

A: Because it can solidify a team and becomes a reference to help team members move forward. Working as a team improves performance, reaches objectives more effectively and can produce lasting results. It's also more fun and professionally rewarding. In contrast, working in a "command and control" hierarchy reduces professionalism ("the boss knows it all"), stifles innovation, discourages performance and increases stress.

Q3: Once the TC is finished and submitted to the Front Office, into which file cabinet do I store it?

A: None. It belongs to the team, not the archives. It should be the team's "job aid" that each member can keep around. Don't laminate or bind it – the TC should evolve, change as the team changes, improve along the way. It's what is called a "living document;" in fact, I heard that TCs prefer Egusi soup with pounded yam, so give it whatever it needs to keep it alive and you'll find that your team thrives as well.

Q4: The TC is fine for other SOs, but mine is different. Our work is internal and administrative, so why do we have to write one ?

A: Team work is an effective management solution for most functional areas. In fact, one would be hard-pressed to identify anywhere in USAID where organizing work by teams would not be better. In organizational units handling finance, procurement, contracting, support services and the like, team work is absolutely essential. To ensure performance, these team members should a) know exactly how their output contributes to the team's productivity; b) have a backup person equally responsible for that output; c) take responsibility for meeting both individual and team performance targets; d) know which decisions are only made by certain team members. To track performance, a team handling vouchers, for example, should know the average time needed for a single voucher to be processed each month, how many errors had to be corrected, and of course, the exact "paper trail" the voucher follows.

Q5: *If the team can do everything, why do we have delegations of authority??*

A: A team is not democratic in all respects. The Team Charter should spell out who is responsible for what on the team. It should specify those responsibilities, such as approval of leave time, that are reserved for the Team Leader. It should list the authorities delegated to the team.

Q6: *How many pages do the regulations require for the Team Charter?*

A: As many or few as the team wants, as long as it covers what is needed.

Q7: *Where is the Team Charter described in the ADS?*

A: Interestingly, a TC is not mandated by the ADS but is recommended. It is discussed in the ADS 200 series. The ADS gives considerable guidance on how a team can organize itself and operate well.

Q8: *Then what should be included in the TC?*

A: The following are typical:

- Vision, Mission statement or goal for the team (this is not the same as your SO)
- The Strategic Objective – what results are sought?
- Team values and norms – how to work together
- Management Structure – how will the team be organized? Around IRs? Thematic areas?
- Functions and Responsibilities of all Team Positions and Incumbents
- How decisions are made
- Relations with Partners and with Front Office
- Performance evaluation responsibilities
- Delegations of authority
- Team strengthening and staff development

These are illustrative of sections that have appeared in some TCs. They are not inclusive. The team should decide what is important for them to put in the TC.

Q9: *I am the program assistant and was told by the Team Leader to write the TC. Is this right?*

A: No. Read the answers to Questions 2-4 above.

Q10: *When our team got to the part about Roles and Responsibilities, we made reference to our old job descriptions since the Team Leader was away. Was this the right thing to do?*

A: Not really. One of the most important outcomes from team meetings dealing with the TC is that members can all identify together the major responsibilities that the team must be responsible for. List them all – not by position but by result needed. And don't list tasks but list responsibilities. Then, look at how the team will make sure all those responsibilities are covered. Here you can look at what positions (not people in those positions) are needed to make sure the main results are obtained. Once you put those up on flip charts, you can see your organizational chart develop.

Q11: We did what you said but our position descriptions don't look like our old ones. What do we do?

A; Write new position descriptions. People forget that PDs should be reviewed and rewritten frequently. The regs always said they should be rewritten anytime that position responsibilities change. They are not cast in stone, especially now that USAID/Nigeria is certified for the new CAJE system, which encourages *aligning* actual jobs people are doing with their PDs. So, write down the new responsibilities under each position. You now have the ingredients for doing a new PD.

Q12: But shouldn't the Team Leader write all the new PDs for the team?

A: No. That's "old-think" when we were in a command-and-control culture where we followed instructions from the boss. In a team, you formulate our own PD with other team members, including the Team Leader, writing down what you contribute to the team. You can get help from other team members to do this. The Team Leader can help refine that PD and you should both agree on what it is you will be responsible for – and evaluated on – for the year, in addition to your responsibilities to the team.

Q13: When you rewrite a PD, doesn't that mean the classification changes?

A: No. The subject of classification and grades is not connected to the process of *realignment* that goes on in writing the TC. Remember, realignment is what the team is doing when they align new team responsibilities with new positions descriptions. The classification of positions involves many other factors. And remember when aligning positions that the fact of supervising someone is *not* an important factor in classifying that position's grade – this is frequently misunderstood.

Q14: Is it possible that our team would not have to realign ?

A: Possible? yes. Likely? no. Since the environment is changing (new IPs, more/less staff, new authorities in the Mission, new regulations, new stakeholders, new development areas, new equipment, etc.), usually teams have to take a look at their allocation of responsibilities at least every year. You may not have to realign all positions, but at least some will need to change.

Note: There are many more questions that could be asked and answered – this is only a beginning and I welcome your feedback. Andrew Gilboy

SO-13 Team
Definitions of "Integration"

The following were developed by SO13 team members at a retreat held in 2003 that laid the groundwork for integration that was included in the 3 RFPs that resulted in the GHAIN, COMPASS and ENHANSE programs.

1. Holistic programming; all encompassing
2. Access to services at the same point, e.g., health and education receiving services at the same time – this includes HIV/AIDS messages.
3. Access to services and existing community plans
4. Access to a constellation of services (RH, MCH, HIV counseling) by the same client at the same site.
5. Health and education jointly involved in similar activities, targeting same audience or geographic location.
6. Like a recipe where all things go in to give one result in an orderly fashion, like bread dough: dry with wet alternative between the two.
7. Allows and encourages more than one critical GDO element to join with one or more additional GDO elements in an "implementable" activity – to maximize impact.
8. Like diffusion, a confluence, meeting point, that one program is part of the mission-wide activity and not completely at variance.
9. Continuing health and education services to the extent possible, e.g., bringing together CAPA committees and PTAs to identify and address health issues. Using school sites to deliver health services and messages. Making both health and education more accessible and working together for much more significant outcomes for both.
10. Joint ventures to achieve results
11. Health activities conducted in school; children undertaking health activities at home with their parents; private sector supporting schools; county+govt + pvt sector + CBO working together
12. Maximizing program impact by defining opportunities for health and education activities to mutually benefit one another; for ex., community groups discussing health and education issues as seen by them; or, resolution of health and education problems by communities.

Tips on Managing E-Mail [1]

- Be concise, readable, use bullets, paragraphs
- Answer all questions (to reduce email back-and-forth)
- Use "out of office" assistant
- Use a correct subject line (not "FYI" "Thank You" "Help needed" or "Hello")
- Use proper spelling, punctuation (being sloppy conveys a message!)
- Answer swiftly (even if you can't answer, send an email acknowledging receipt)
- Get to the point (keep "small talk" to a minimum)
- Don't attach unnecessary files (or require the recipient to print your emails)
- Use proper structure and layout (reading from a screen is tiring and difficult)
- Create a signature line
- Use "cc" sparingly (ask yourself if the recipient will understand getting your email)
- Be careful using "bcc" (blind-copy) because it can be misunderstood (use forwarding)
- Don't overuse "high priority" option
- DO NOT WRITE IN CAPITAL LETTERS
- Read your email before you send it out
- Do not overuse "reply to all" (does everyone need to see your reply?)
- Don't send emails when angry
- Don't forward chain letters
- Do not "request delivery" or "read receipts"
- Don't "recall" a message (better to send out a correction and admit a mistake)
- Use active rather than passive voice (more personal and informal)
- Avoid long sentences (15-20 words max) and long emails (keep text within screen)
- Do not send offensive messages (jokes, remarks can backfire)
- Go easy on "thank you" but be courteous in including greetings

INCREASING YOUR EFFICIENCY

<u>Assumption:</u> you want to reduce your email traffic and time spent managing them.

- Send fewer emails if you want to reduce your incoming emails !
- Ask yourself who sends you the most emails each day?
- Ask who sends the most "low-impact" messages each day?

You may be able to target a few sources of excessive and low-impact emails that clutter up your inbox and irritate you. Consider contacting those people personally and politely discussing the issue. Be positive and not accusatory. The key is communication – clarifying what you need, appreciating the person's including you, but explaining your position.

- Reduce email interruptions to your work style

One study reported that it takes a worker 25 minutes to get back on track after an interruption. Emails interrupt incessantly and your day can be filled with half-finished thoughts and ideas. They are a major form of irritation and frustration. Therefore, some tips on **reducing interruptions:**

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[1] Adapted by Andrew Gilboy from *InfoLine*, Vol. 24, August 2007, American Society for Training and Development, Alexandria, VA.

- Turn off the email alert! That “email sound” adds to your irritation level.
- Check emails periodically but not continually (2 to 4 times per day)
- Establish times when you check email and discipline yourself to keep to that schedule
- Don’t do emails from home or your car unless you’re sure you not “email addicted” !