Implementing Self-Managing Foster Teams: Recommendations and Best Practices

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Introduction

Purpose

As shelters and rescues consider organizing their foster activities around teams and small groups, they will likely face a number of challenges. One immediate challenge is how to support foster teams that are self-managing or autonomous. Thus, the goal of this project was to review the very rich literature on autonomous/self-directed teams and identify (1) key learnings and (2) practical recommendations.

Background

The defining feature of self-managing teams is that group members are not only involved in task-based decisions (e.g., how to care for pets, schedule adoptions), but also have control over the design and membership of their group (Goodman, Devadas, & Griffith Hughson, 1988). That said, self-managing teams often vary in the degree to which they decide how to perform their work, monitor and manage the work process, and design and modify the team and its context (Manz & Sims, 1987; Manz, 1992). But, in all cases, members of self-managing teams recognize and perceive the increased autonomy and control afforded to their group (Kirkman & Rosen, 1999; Seibert, Wang, & Courtright, 2011).

Self-managing teams are frequently used in the private sector. Their use originated, and has predominantly been studied, in manufacturing settings. For instance, studies have been conducted with teams that produce computer chips (Millikin, Hom, & Manz, 2010), food products (Morgeson, 2005), and coal (Goodman et al., 1988). Nevertheless, self-managing teams are now common in educational settings (Druskat & Wolff, 1999), product-development teams (Uhl-Bien & Graen, 1998), and military settings (Mathieu, Tannenbaum, Kukenberger, Donsbach, & Alliger, 2015).

In general, self-managing teams provide a number of benefits. Most importantly, these types of teams afford members more flexibility in adjusting resources in response to new demands or challenges (Manz, 1992). Furthermore, team members often report more positive attitudes working on these teams rather than performing their jobs individually. As Seibert et al. (2011, p. 986) noted:

> *"[Self-managing] teams are likely to be motivated by a sense of ownership or responsibility over their work; they are likely to take an active orientation toward their work and their work environment, seeking continuous improvement in work processes and seeking innovative solutions to work problems; and they are likely to strive to produce higher quality work products and services. [Self-managing] teams are therefore likely to be more effective and productive."*

Although self-managing teams can provide a number of benefits, their success is dependent on their proper implementation. For example, these teams are more likely to thrive when their organizations have managerial practices in place to support their implementation (e.g., knowledge sharing strategies), there is a wealth of positive leadership (e.g., managers regularly delegate to their employees), and the work is designed so that team members have clear roles, regularly receive feedback, and effectively balance their workload (Seibert et al., 2011). Thus, there are a number of factors that can help make self-managing teams successful.

Design and Methodological Approach

In order to identify the factors that are most relevant to the success of foster teams, we conducted a systematic search of the applied and academic literature. More specifically, we used *Google Scholar*, which represents multi-discipline database and thus captures references from multiple fields (e.g., psychology, management, sociology, communication). We used key terms,

like "self-managing", "autonomous", "teams", "work groups", to narrow our search. We also conducted forward and backward searches of articles that were identified (i.e., articles that cited, or were cited by, relevant search results).

While selecting references to include in this report, we emphasized summary or review articles and recent publications to ensure our conclusions are both comprehensive and contemporary. Ultimately, this process returned 30 articles and book chapters on self-managing teams. Many of the references are from the fields of management and industrial-organizational psychology. However, there were a handful from other fields (e.g., human factors/ergonomics).

Along with this topic specific results, we also leveraged a separate, more general literature on "team effectiveness" to identify factors that enhance team success (regardless of whether they are self-managing). This review returned 30 references on topics ranging from leadership, to communication, to conflict.

Findings

Our review of the literature yielded two categories of recommendations. First, we identified general recommendations that teams, regardless of their degree of autonomy, can implement to enhance their effectiveness. For example, teams that engage in two-way, closed-loop communication often demonstrate higher performance (Salas, Sims, & Burke, 2005). We also identified recommendations that are more germane to self-managing teams.

A model summarizing our recommendations is presented in Figure 1. The general recommendations are depicted as a foundation. More specific recommendations, and their likely order of implementation, are represented as an ascending arrow in this figure.

Here it is important to note that we considered certain aspects about rescues and shelters when selecting which recommendations to emphasize. First, we focused on strategies that were

actionable and behavior-oriented. Thus, the recommendations depicted in Figure 1 reflect things that shelters and foster teams can *do* to enhance their success. Second, we chose to emphasize recommendations that would not substantially increase a shelter's overhead or entail long term costs. We recognize that many non-profit organizations have limited resources and it may be difficult to devote additional funds to activities beyond their immediate mission. Third, we emphasized recommendations that we thought were feasible. We recognize that volunteers are most passionate about helping animals and would rather spend their time performing those activities. Thus, the recommendations included in this report were chosen because they can be implemented by front-line personnel with minimal managerial or teamwork experience.

The Following Sections

In the following sections, we begin by describing the general recommendations. As noted previously, these are components that are critical to the success of any type of team. Next, we discuss aspects of teamwork that are most pertinent to foster teams. That is, these recommendations were drawn directly from the self-managing teams' literature. Finally, we include additional resources and templates in the appendices to supplement the information reviewed in the report.

General Recommendations for Establishing Effective Teams

Although there are a number of things that self-managing teams need to do to succeed, there are some tactics and strategies that benefit all teams. Below is a brief summary of four key things that generally enhance the chances of success for all groups.

1. Establish Clear Expectations Early On

Before a team begins its task work in earnest, it is helpful if group members have a clear understanding of what the teams' goals are, what their responsibilities are, and how to respond or adapt to uncertain or ambiguous situations. Discussing these topics as a group, reaching consensus, and documenting the teams' thoughts are great exercises for newly formed teams.

One framework for working through these topics is drafting a team charter. Charters help clarify performance expectations, specify members' roles and responsibilities, highlight relevant challenges or opportunities that may emerge, and establish group-level performance goals. An example of a worksheet for developing a team charter is presented in Appendix 1.

This form addresses a number of important topics. In particular, the form provides space for team members to document their:

- Contact information
- Strengths and weaknesses as they relate to fostering animals (e.g., certain skills that may be especially relevant for the team's work)
- Goals for the group
- Understanding of different roles or duties that need to be completed (see Figure 2 for general group roles)
- Anticipated timetable for the fostering process
- Expectations regarding poor performance

- Processes for dealing with unforeseen circumstances or emergencies

- Ideas for helping ensure the team stays on track

Ideally the charter should be drafted and agreed upon very early on within a team's development. In fact, we would recommend that these topics be addressed within the first *two weeks* of forming the team. It would also be helpful to periodically revisit the charter. For example, the team could review each of the topics following major accomplishments or struggles (e.g., successful/unsuccessful pet adoption). These periodic reviews of the charter can help ensure the team is adapting and responding to new demands or challenges. Also, the charter could be reviewed when a new member joins the group. This will help the new teammate understand what is of expected of them and integrate more quickly.

2. Encourage Regular Communication among Team Members

Communication is a key ingredient to ensuring teams perform well (Salas et al., 2005). Ideally, teams should strive for closed-loop communication. Closed-loop communication occurs when:

1. The person sending a message follows up with team members to ensure the message was received.

2. The person receiving a message confirms that it was received.

3. The person receiving the message verifies and confirms that they understood the message as it was intended.

This communication pattern avoids miscommunications and increases understanding within the groups. Some communication strategies that team members can adopt to "close their communication loops" include:

- Replying to text messages, e-mails, or voicemails to confirm that the message was received and understood (e.g., "Hey Jane, just wanted to let you know that I got your message about dropping the dog off tomorrow. I'll plan to be there at 4:00PM).

- Regularly copying one another on e-mails

- Holding weekly team meetings (i.e., huddles) in which information can be shared among the entire group and shared understanding can occur

By thinking of their communication as a skill that needs to be developed, and emphasizing the points mentioned above, teams can continue to improve their interpersonal communication.

3. Provide Backup and Support

One of the primary benefits of working in a team is having the opportunity to share one's workload with one's teammates (Loughry, Ohland, & Moore, 2007; Porter, 2005). That is, if a single teammate becomes overwhelmed, he or she can contact his or her group members to see if they can help. Thus, teams are more effective to the extent to which they can be fluid and dynamic in their task roles and responsibilities.

To facilitate effective back up and support behaviors, team members can:

- Develop a clear understanding of who is responsible for specific duties and roles (establishing a team charter is a great first step for this process)

- Understand what each other's strengths and weaknesses are so they can anticipate potential workload challenges

- Regularly check in with one another to see how they are doing (e.g., send a quick e-mail to the group member who is housing the pet and see if he or she needs anything)

- Ensure they do not become complacent or overly reliant on their peers help (i.e., ask for help when it is needed, but do not take advantage of their peers) (Porter et al., 2003)

- Be careful not to neglect their own responsibilities (i.e., if a team member is helping too much, his or her duties may suffer) (Barnes et al., 2008)

4. Actively Manage Conflict

Teams inevitably experience conflict. Oftentimes, team members disagree about what needs to get done (i.e., task conflict), differ on how tasks should be completed (i.e., process conflict), and experience interpersonal incompatibilities (i.e., relationship conflict). Although it is generally assumed that conflict disrupts team performance, researchers have found that it depends on the type of conflict that is being experienced (de Wit, Greer, & Jehn, 2012). That is, although relationship conflict consistently disrupts team performance, task conflict, if addressed appropriately, can enhance team performance by facilitating process improvements and feedback (Jehn & Mannix, 2001).

Thus, if conflict arises, it is helpful if teams actively manage their disagreements (Bergmann & Volkema, 1989; Jehn, Rispens, & Thatcher, 2010; Tekleab, Quigley, & Tesluk, 2009). Although there are a number of strategies that can be used, they can usually be classified under the five approaches summarized in Table 1. As this summary suggests, teams are more likely to benefit from disagreements about tasks or processes if they actively manage their conflict (e.g., collaborating or third-party strategies) rather than ignore such disagreements (e.g., avoiding strategy)

Specific Recommendation for Implementing Foster Teams

Along with the general recommendations in the previous section, we also identified a number of strategies that would be especially relevant to the self-managing foster teams. In selecting which recommendations to emphasize, we chose topics that would draw upon many shelters' strengths (e.g., motivated, passionate volunteers) and minimize potential weaknesses (e.g., limited financial resources at shelters).

These recommendations are presented in the approximate order in which shelters will likely face specific challenges. More specifically, the first set of recommendations pertains to establishing foster teams and supporting liaisons. Next, we provide suggestions for staffing or composing teams as well designing them to facilitate team success. Finally, we offer ideas for ensuring foster teams regularly monitor their performance.

1. Determine When to Implement Foster Teams

Teamwork can be challenging—especially when teams are working independently and managing their own schedules. Thus, foster teams and their liaisons, at least at the beginning, will likely need additional resources to be successful. Thus, it is important for shelters and rescues to consider when would be the appropriate time to implement or launch foster teams.

One factor that is worth considering before implementing foster teams is whether the climate of a shelter or rescue is conducive to teamwork. Self-managing teams are more likely to thrive in organizations that encourage autonomy, empowerment, self-starters, and creativity (Sundstrom, De Meuse, & Futrell, 1990). Thus, leaders within a shelter or rescue may ask themselves, or their colleagues, some of the following questions:

- How do I (we) respond when someone in the shelter tries completing a task differently?

- How much do I (we) like to know about how our volunteers complete their work?

- How do I (we) respond to mistakes in the shelter?

To the extent that shelters, and their leaders, are comfortable with volunteers trying new working procedures, trust their staff to complete their work independently, and respond constructively to failures or mishaps, then the climate is more conducive to launching a foster team program.

Along with the climate of the organizations, shelters and rescues should consider whether there are enough resources to initially support a new foster team (Goodman et al., 1988). Some factors that will likely be especially important to consider include:

- Personnel who have experience working in the shelter and enough free time to train, guide, and support the foster team liaison(s)

- A sufficient number of skilled and passionate volunteers to staff the foster teams (see Specific Recommendation #2 for more information)

- The degree of stability in the challenges or demands facing the shelter (e.g., fluctuations in the number of rescues, variable operating budgets)

Researchers have found that when teams are implemented without adequate support or resources, employees may question the necessity of teamwork and the motives for adopting a team-based work system (Barker, 1993; Sewell, 1998). Thus, before implementing foster teams, it would be helpful for shelters and rescues to consider whether they are prepared for redesigning some of their work processes. Their commitment must be deep and genuine, otherwise they are setting foster teams up for failure.

2. Provide Training and Support to Liaisons

Liaisons occupy an important, but potentially challenging, position within the foster teams. That is, these individuals straddle the boundary between the shelter or rescue and their

foster team. Without an enthusiastic and engaged liaison, a foster team may become disconnected from the mission of the shelter.

Part of the difficulty facing the liaison is due to the somewhat paradoxical position of a leadership role in a self-managing team. That is, if the team is self-managing, why would it need someone to be a leader (Druskat & Wheeler, 2003)? The answer, based on existing research, is that the liaisons are critical for developing strategic connections between their foster team and the shelter or rescue (Druskat & Wheeler, 2003, 2004). Because most team members will be focusing on the goals of their group (e.g., marketing the pet, caring for the pet), they are unlikely to be attuned to the broader needs of the shelter. Also, the liaison is critical for supplying the team with information (e.g., changes in policies from the shelter), resources (e.g., requesting additional funds or supplies for the foster team), and support (e.g., providing encouragement to individual team members and the broader group).

Given the difficulty of this role, there are a few tactics shelters can adopt to help their liaisons acclimate to the role and become successful. First, along with a job description, it would be helpful to provide liaisons with clear guidelines on what can help make them effective. One useful model is based on Druskat and Wheeler's work (2004) (see Figure 2). These authors identified four functions (Relating, Scouting, Persuading, and Empowering) and 11 behaviors that effective leaders of self-managing teams perform (see Table 2 for a summary). As these figure and table suggests, liaisons will be most successful if they balance their activities and attention between their team and the shelter or rescue.

Along with giving liaisons suggestions for managing their role, it would also be helpful if shelters and rescues provided clear guidelines about how a liaison's foster team fits within the broader organization. That is, rescues and shelters can help clarify:

- What are the fosters team responsible for? What are they not responsible for?

- How will a foster team know when they are performing well?

- What resources are available to the foster teams (e.g., personnel, materials)?

Finally, research suggests that rewarding or acknowledging an entire team for its performance (rather than individual group members) can increase their likelihood of collaborating in the future (Wageman, 1995). Thus, to the extent that shelters and rescues can provide liaisons with resources and mechanisms for acknowledging their teams when they do well, one would expect better team functioning. For example, liaisons may be afforded the opportunity to identify when their team does well in the shelter's newsletter or on a message board. Liaisons may also be given small monetary contributions to help organize celebrations for their foster teams after achieving key milestone or goals. Regardless of the specific reward, the main purpose is to reward the entire group (i.e., the foster team) for its successful performance.

3. Use Rigorous Methods for Composing Foster Teams

Another challenge facing shelters and foster teams is finding volunteers who are very responsive, passionate about the mission of the organization, and enjoy working together. Although many, if not all, of a shelter's volunteers will be passionate about their organization's mission, some may not have the right experience, skills sets, or working styles for being a successful member of the foster teams. For example, those who prefer to work individually are likely to experience less satisfaction volunteering as part of the foster teams (Campion, Papper, & Medsker, 1996). Given this consideration, it is really important that foster teams are composed using rigorous selection methods. Below are some examples of resources or tools that a liaison or shelter coordinator could use to help select members of the foster team:

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Brief Questionnaire. Survey are useful for collecting a lot of information about potential teammates in a short amount of time. Two surveys that may be especially useful for finding members of foster teams are the Preference for Workgroups (PFG) and Team Roles Experience and Orientation (TREO) questionnaires (see Appendix 2 for full list of questions). The PFG is a brief, three-item survey that asks people about their general attitudes towards working in teams. People answer questions using a 1 (*Strongly Disagree*) to 5 (*Strongly Disagree*) scale. Someone's overall preference for working in teams can be assessed by averaging their responses to each of the three items. Prior research has found that most scores fall between 3 (*Neither Agree or Disagree*) and 5 (*Strongly Agree*) (Campion et al., 1996). Thus, a volunteer may be especially well-suited for joining a foster team if their average score is greater than 4 (*Agree*).

In addition to assessing volunteers' preferences for working in teams, it may also be helpful to determine what roles they prefer to occupy while working in groups. Recently, researchers have developed a brief survey about preferences and experiences for performing certain roles on a team (i.e., the TREO, Mathieu et al., 2015). Based on a comprehensive literature review, these authors identified and defined six general roles (see Figure 3):

Using these definitions, the authors developed and pilot tested the TREO with four separate groups of people (total N = 1439). The final survey asks respondents 48 questions about their experiences in certain roles (i.e., things the person has done previously) and orientations for certain roles (i.e., things they'd prefer to do). By asking potential foster team members to complete the TREO, shelters can determine if a group will have enough the roles represented. For instance, a team comprised entirely of *Challengers* would be expected to

experience quite a bit of conflict, while a group consisting of both *Challengers* and *Team Builders* may be better able to manage potential conflict.

Also, the TREO might be used to identify volunteers who are well-suited to serve as shelter team liaisons. That is, people who score exceptionally high on the *Connector* role may have prior experiences with, or a preference for, spanning the divide between their foster team and the shelter or rescue.

Interviews. Along with the questionnaires, shelter and rescue coordinators, as well as foster team liaisons, may want to interview potential team members. To be as effective as possible, these interviews should:

- Focus on topics that are directly related to the tasks performed by team members (e.g., previous team experience, marketing pets, facilitating adoptions)

- Use the same questions and interviewer during all of the interviews for a single foster team

- Feature some form of note-taking of candidate's responses

- Consist of a structured rubric for evaluating candidate's responses

By ensuring these structures are in place, shelters and rescues can be more confident that the interviews are providing job-relevant information that will be helpful for identifying the volunteers who are most likely to succeed in foster teams. A sample interview form is provided in Appendix 2.

The use of these methods above serves an additional purpose of clearly communicating to volunteers that you are staffing a team initiative. That way, the know what they are getting themselves into and drop out of the selection process if it does not seem to be a good "fit" from their perspective.

4. Design Teams to Encourage Teamwork rather than "Piecework"

Foster teams should be different than traditional groups that consist of specialized personnel (e.g., an emergency room team that consists of surgeons, anesthesiologists, and nurses) (Lee, Koopman, Hollenbeck, Wang, & Lanaj, 2015). In traditional groups, members may be more inclined to divide the work into distinct parts, work independently, and only occasionally pool their efforts. So, rather than performing teamwork, they do "piecework".

As a means of fostering collaboration and teamwork, shelters and liaisons can adopt a few strategies that encourage work sharing and load balancing so as to create a genuine foster team. First, shelter coordinators and liaisons can encourage foster teams to make decisions about resources at a group level. So, rather than having a single team member decide how funds for managing a pet are allotted or developing the timeline for major adoption activities, these conversations could be had among the entire group. This approach allows team members to identify challenges with how resources are being allocated and provide new ideas for how to execute the team's tasks. Ideally, these conversations increase the likelihood that group members will be engaged in important decisions and identify more with the team and "own" all of its work and challenges.

Foster team members should also be encouraged to change roles regularly and train other members of their group. For instance, rather than have one individual always be responsible for marketing the pet, the foster team could commit to changing roles after each animal is adopted. When team members swap roles, they could have brief "cross-training" sessions where they share lessons learned, provide helpful materials, and brainstorm ideas for improving work flows. One way to encourage flexibility in roles may be to emphasize broader role assignments initially (e.g., the six roles included in the TREO questionnaire, see Figure 3) and encourage teams to

rotate through specific duties or assignments (e.g., Pawperazzi, Caregiver, Scout). With this strategy, someone is always occupying the role of Challenger, but their specific duties may fluctuate. But, the resilence of the team is enhanced to the extent that all can effectively do ever role/duty.

Finally, teamwork often becomes more difficult as the size of the group increases. Researchers have found that adding more people usually leads to reduced communication and greater coordination challenges (Sundstrom et al., 1990). This may be especially true in groups that are as dynamic as self-managing teams. Thus, to encourage teamwork, it would be helpful to limit the size of the foster teams to the smallest number of people who can do the task. Although the exact number will likely vary depending on the responsibilities of a foster team, most research suggests that projects teams with more than 8 members will begin to split into smaller "subgroups" (Carton & Cummings, 2012).

5. Provide Resources to Facilitate After Action Reviews (AARs)

Self-managing teams often become engrossed in their day-to-day activities and may overlook opportunities to improve their performance. That is, these teams often focus on their *task work* (e.g., "What does our pet need this week?") and rarely stop to consider their teamwork (e.g., "How well did our group handle this last challenge?"). Thus, it can be helpful to provide foster teams with resources aimed at ensuring mistakes and lapses (as well as accomplishments) are identified and there are opportunities to share and provide feedback (Salas et al., 2005).

One potential strategy for helping foster teams to monitor their own performance and identify areas for improvement is by completing After Action Reviews (AARs). AARs are structured conversations that occur after significant events or time points and focus on evaluating a group's performance while seeking ways to improve (Eddy, Tannenbaum, & Mathieu, 2013)

(see Appendix 3 for an example protocol for conducting an AAR). For instance, AARs are commonly used in military settings after training exercises. Team members are encouraged to discuss how well the group did and areas in which it can perform. Research has found that although AARs are usually brief (average length = 18 minutes), they can typically enhance a team's performance by 25% (Tannenbaum & Cerasoli, 2013).

When designing an AAR, there are a few things that are helpful to keep in mind. First, AARs are more effective when team members are encouraged to reflect independently and anonymously prior to the meeting. This tactic allows more introverted, or reserved, members to provide input and enhances the overall quality of the conversation. Second, AARs work best when all team members provide input. Each member of a foster team may have a unique perspective about a team's experience. Ensuring that all of these voices are heard increases the likelihood that useful feedback can be identified. Third, during the conversation, foster teams should be encouraged to focus on teamwork (e.g., working with each other) rather than task work (e.g., getting things done). Usually teams prefer talking about their tasks rather than their interpersonal relationships. However, these interpersonal relationships and interactions are often a key component to ensuring a team will continue being successful. Fourth, teams often avoid discussing areas of disagreement or high priority topics early on during the debrief. Instead, these issues emerge towards the end of the meeting when there is less time available to come to a resolution (Eddy et al., 2013). Thus, foster teams should could be encouraged to address the key areas of discrepancy early on during the AARs. Finally, AARs are most successful when teams can identify, record, and commit to action plans designed towards improving their performance. Thus, AARs should close by asking the question "How do we get better?" and "Who will perform each part of the solution?".

Along with these strategies for implementing specific AARs, there is evidence to suggest that the timing of group feedback can impact its effectiveness (Druskat & Wolff, 1999; Kluger & DeNisi, 1996). Thus, AARs would ideally be scheduled following key milestones in a foster team's history (e.g., a successful or unsuccessful adoption).

Finally, research has found that these meetings are more effective if led by an external facilitator (Tannenbaum & Cerasoli, 2013). Facilitators often provide an impartial and fresh perspective when helping the team process its recent performance episode. Thus, this strategy will likely be most effective if the foster team's AARs are facilitated by an employee or senior personnel from the shelter or rescue (e.g., coordinators or supervisors). But, over time, the foster team may not need a facilitator at all occasions.

Conclusion

Self-managing foster teams can provide a number of benefits. For volunteers, they provide a tremendous amount of flexibility that can allow multiple group members to share resources and manage the demands of fostering pets. For shelters, they provide alternative strategies for finding homes for pets and a mechanism by which to increase foster rates. However, teamwork may also present unique challenges (e.g., managing conflict, assessing performance, providing feedback). The recommendations provided in this report are intended to minimize the likelihood that volunteers and shelters experience challenges when implementing foster teams and ultimately increase the groups' chances of success.

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Figure 1. Recommendations for Implementing Foster Teams

Determine When To Implement

Provide Training and Support to Liaisons

Use Rigorous Methods To Compose Team

Design Teams To Encourage Teamwork

Provide Resources for After Action Reviews (AARs)

General Recommendations			
Establish Clear Expectations	Encourage Regular Communication	Provide Back-Up and Support	Actively Manage Conflict
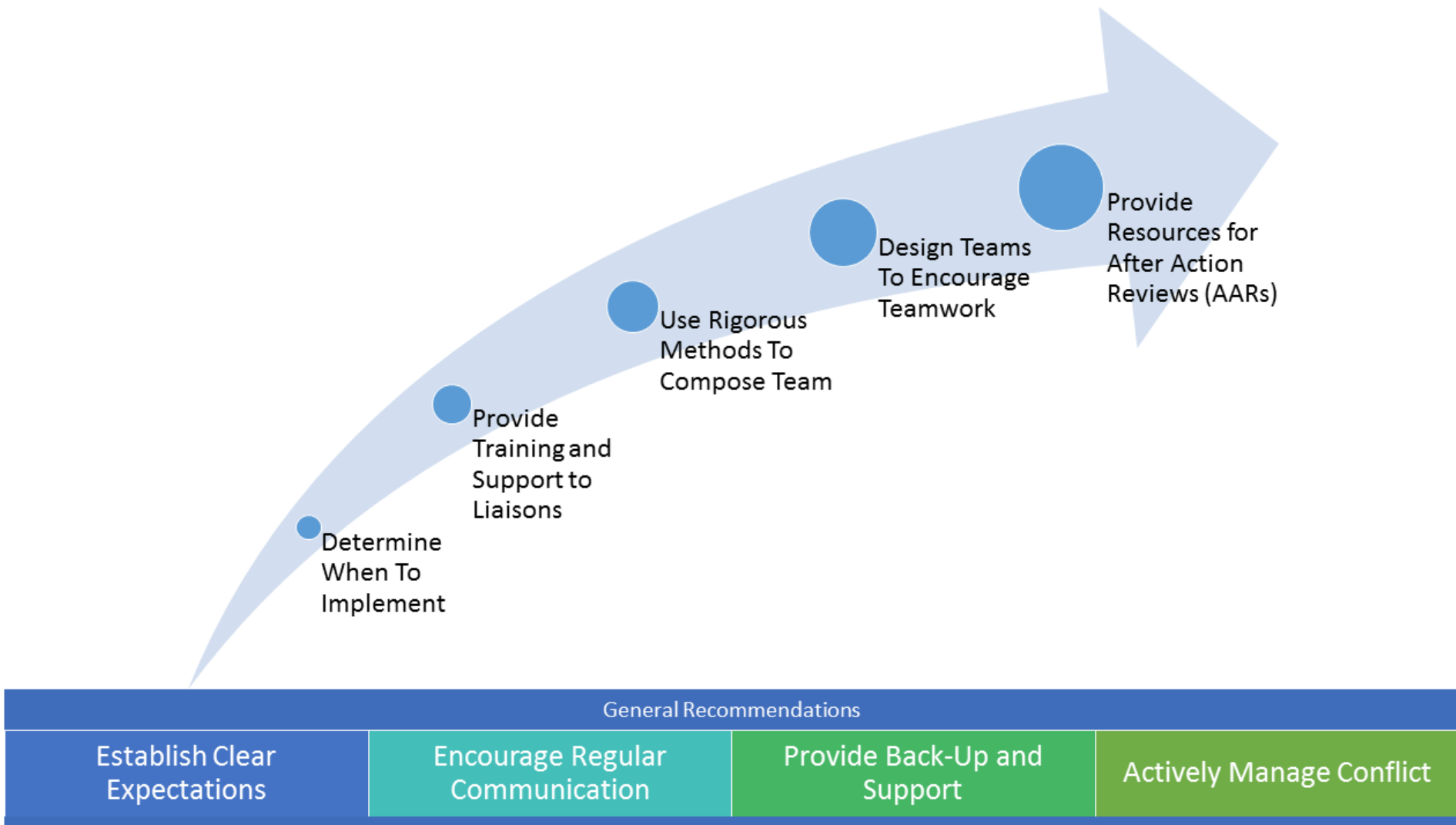
Table 1. Strategies for Reducing Conflict

Avoiding	▪ Ignore minor or inconsequential disagreements between team members ▪ Less effective in foster teams because of ongoing relationships
Contending	▪ Individual member forces his or her ideas or opinions into action while disregarding others' responses ▪ Exacerbates relationship conflict and undermines any potential benefits from task conflict and process conflict
Compromising	▪ Identify solution that partially satisfies all parties ▪ Reduces conflict over the short-term but unlikely to be effective in the long-run
Collaborating	▪ Sharing ideas to identify a mutually-agreed upon solution that satisfies parties ▪ Reduces conflict over the short-term and enhances effectiveness in the long-run
Third-Party Intervention	▪ Invite others outside the team (e.g., shelter personnel) to mediate or resolve the conflict ▪ Leads to long-term solutions and improves communication among team members

Figure 2. Model of Liaison Effectiveness

Shelter Focused Behavior

Shelter/Foster Team Boundary

Foster Team Focused Behavior

1. Being Socially and Politically Aware

4. Seeking Information

7. Obtaining External Support

2. Building Trust

3. Caring for Team Members

5. Diagnosing Member Behavior

6. Investigating Problems Systematically

8. Influencing the Team

9. Delegating Authority

10. Exercising Flexibility

11. Coaching

Team Effectiveness

Table 2. Summary and Examples Self-Managing Team Leader Functions and Behaviors

Function and Behavior	Description	Example
Relating		
Being socially and politically aware	Liaisons need to be aware of what the shelter's missions and goals are, learn who can be contacted to provide information and resources, develop rapport with key constituencies.	Forming relationships with administrative personnel, veterinary staff, and management.
Building trust	Liaisons should strive to demonstrate to their team members that they are fair, honest, reliable, and focused on the team's interest.	Being responsive via e-mail or phone to a team members' request.
Caring for team members	Liaisons should demonstrate that they care about and understand the needs of their team members	Altering the team's work flow to support a group member who becomes ill and cannot meet his or her responsibilities.
Scouting		
Seeking information from shelter/rescue staff and personnel:	When unsure about something, liaisons should contact someone in the organization rather than relying on their own information	Double-checking about a particular policy with shelter personnel.
Diagnosing team member behavior	Liaisons will be more effective if they are attuned to their team members nonverbal and verbal behavior.	Understanding that a team member is upset based on his or her communication style during a phone conference.
Investigating problems systematically	Liaisons break problems into smaller pieces and collect data within the team trace its cause.	Brainstorming alternative modes of advertisement for increasing inquiries about pet adoptions
Persuading		
Obtaining external support	Liaisons should use persuasion to shape the beliefs and behaviors of external constituents so that they will provide assistance to their team	Proactively approaching shelter or rescue staff about adoption events or strategies.

Function and Behavior	Description	Example
Influencing the team	Liaisons need to use persuasion or encouragement to shape the behaviors of their team members so they will make choices that benefit the group.	Explaining the shelters needs and missions to their team and asking for their input.
Empowering		
Delegating authority	Liaisons should give control, decision-making authority, and responsibility to the team.	Ask the team to decide when they will rotate roles or conduct after action reviews.
Exercising flexibility regarding team decisions	Liaisons should be open-minded about the way the team or a team member chooses to complete an assignment.	Adopts new communication technology (e.g., Google Hangouts) after suggestions from group member.
Coaching	Liaison should provide encouragement and feedback and help develop their team member's skills.	Provides feedback to team member about selecting more effective adoption events.

Figure 3. Common Roles Performed within Teams

Someone who helps bridge and connect the team with people, groups, or other stakeholders outside of the team. Connectors ensure good working relationships between the team and "outsiders," whereas Team Builders work to ensure good relationship within the team.

Connector

Someone who acts to structure what the team is doing. An Organizer also keeps track of accomplishments and how the team is progressing relative to goals and timelines.

Organizer

Someone who helps establish norms, supports decisions, and maintains a positive work atmosphere within the team. A Team Builder calms members when they are stressed, and motivates them when they are down.

Team Builder

Someone who willingly takes on work and gets things done. A "Doer" can be counted on to complete work, meet deadlines, and take on tasks to ensure the team's success.

Doer

Someone who regularly generates new and creative ideas, strategies, and approaches for how the team can handle various situations and challenges. An Innovator often offers original and imaginative suggestions.

Innovator

Challenger

Someone who will push the team to explore all aspects of a situation and to consider alternative assumptions, explanations, and solutions. A Challenger often asks "why" and is comfortable debating and critiquing.

Appendix 1. Example of Team Charter[1]

Team Member Names	Contact Information (E-mail, Cell Phone, Facebook, etc.)	Preferred Contact Method / Limitations (e.g., no calls after…)
Member 1	Contact 1	Pref 1
Member 2	Contact 2	Pref 2
Member 3	Contact 3	Pref 3
Member 4	Contact 4	Pref 4
Member 5	Contact 5	Pref 5
Member 6	Contact 6	Pref 6

Team Member Names	Strengths related to foster activities.	Weaknesses related to foster activities.
Member 1	Strength 1	Weakness 1
Member 2	Strength 2	Weakness 2
Member 3	Strength 3	Weakness 3
Member 4	Strength 4	Weakness 4
Member 5	Strength 5	Weakness 5
Member 6	Strength 6	Weakness 6

1. What are your team's goals for the collaboration?

These should relate to the team's success in fostering animals as well as the strategies that the team will follow to manage the fostering process. What are your team's expectations regarding the quality and timeliness of the team's work?

2. Who is responsible for each activity? What roles will each member have?

Don't forget to include logistical tasks, such as arranging meetings, preparing agendas and meeting minutes, and team process roles, such as questioning (devil's advocate), ensuring that everyone's opinion is heard, etc.

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[1] This example was adapted from resources provided as part of the Comprehensive Assessment of Team Member Effectiveness system (www.CATME.org).

3. What is your timetable for activities?

Due dates, meetings, milestones, deliverables from individuals, if appropriate.

4. What are your team's expectations regarding meeting attendance?

For example: being on time, leaving early, missing meetings, etc.

5. What constitutes an acceptable excuse for missing a meeting or a deadline? What types of excuses will not be considered acceptable?

6. What process will team members follow if they have an emergency and cannot attend a team meeting or complete their individual work promised to the team?

7. What are your team's expectations regarding the quality of team members' preparation for team meetings, the quality of the deliverables that members bring to the team, and the amount of team they contribute to the group?

8. What are your team's expectations regarding team members' ideas, interactions with the team, cooperation, attitudes, and anything else regarding team-member contributions?

9. What methods will be used to keep the team on track?

How will your team ensure that members contribute as expected to the team and that the team performs as expected? How will your team reward members who do well and manage members whose performance is below expectations?

Appendix 2. Examples of Resources to Facilitate Team-Member Selection

Preference for Group Work (PGW) Questionnaire

Directions: Please indicate the extent to which you agree with each of the following statements

by circling the appropriate number.

	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
1. If given the choice, I would prefer to work as part of a team rather than work alone	1	2	3	4	5
2. I find that working as a member of a team increases my ability to perform effectively	1	2	3	4	5
3. I generally prefer to work as part of a team.	1	2	3	4	5

Team Role Experience and Orientation (TREO) Questionnaire

Directions: Please indicate the extent to which you agree with each of the following statements

by circling the appropriate number.

Based on my prior experiences, as a member of different teams…	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
1. I learn how to get outside resources that our team needs to be successful	1	2	3	4	5
2. I'm comfortable being critical of my teammates	1	2	3	4	5
3. I like it when we keep busy and get things done	1	2	3	4	5
4. I like to challenge peoples' assumptions	1	2	3	4	5
5. I like to be the one that sorts out the details of a team project	1	2	3	4	5
6. I often volunteer new ideas and suggestions without being asked my opinion	1	2	3	4	5
7. I can calm people down and get them focused on the task when things get stressful	1	2	3	4	5
8. I like to be the one who decides who will do which tasks on a team	1	2	3	4	5
9. I am the one who questions why we are doing things in a certain way	1	2	3	4	5

Based on my prior experiences, as a member of different teams…	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
10. Sometimes, I just voice a different opinion to keep my team thinking about what we should be doing	1	2	3	4	5
11. I'm always ready to support a good suggestion in the common interest of the team	1	2	3	4	5
12. People usually look to me when something needs to be done in the team	1	2	3	4	5
13. I like to try out new ideas and approaches	1	2	3	4	5
14. I question what my team should be doing to get the job done	1	2	3	4	5
15. I can be counted on to follow through on any tasks which I've been assigned	1	2	3	4	5
16. I can be counted on when a task needs to be done	1	2	3	4	5
17. I keep my team on pace and aware of deadlines	1	2	3	4	5
18. I make sure that my teammates are clear about their responsibilities	1	2	3	4	5
19. I'm comfortable dealing with interpersonal conflicts and helping people work through them	1	2	3	4	5
20. I enjoy coordinating team efforts with people or groups outside of the team	1	2	3	4	5
21. My primary focus is on getting my assignments done for the team	1	2	3	4	5
22. I can be counted on to spread ideas between my team and people outside of my team	1	2	3	4	5
23. I'm comfortable being the spokesperson for a team	1	2	3	4	5
24. I am the one who steps up and does whatever is necessary to make the team successful	1	2	3	4	5
25. I'm often the first to volunteer for a difficult or unpopular assignment if that is what the team needs	1	2	3	4	5
26. I like to be the one who keeps track of how well my team is doing	1	2	3	4	5
27. I am usually the one who suggests a new idea or direction when the team gets stuck on something	1	2	3	4	5
28. I bring a sense of organization to any job a team undertakes	1	2	3	4	5

Based on my prior experiences, as a member of different teams…	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
29. I get bored when we do the same task the same way every time	1	2	3	4	5
30. I structure team activities	1	2	3	4	5
31. I discover and connect with people who can help my team succeed	1	2	3	4	5
32. I'm not afraid to question my teammates' authority	1	2	3	4	5
33. I'm known for thinking creatively and "outside the box"	1	2	3	4	5
34. I typically find out what is going on outside my team and share that with my teammates	1	2	3	4	5
35. I like coming up with new ways that our team can accomplish our tasks	1	2	3	4	5
36. I usually suggest the appropriate steps that my team should follow to get something done	1	2	3	4	5
37. I like helping different kinds of people work effectively together	1	2	3	4	5
38. I'm comfortable producing and sharing new ideas with my team	1	2	3	4	5
39. I often work to maintain good working relationships within my team	1	2	3	4	5
40. It bothers me when I see teammates getting frustrated or depressed	1	2	3	4	5
41. I'm always committed to my team tasks	1	2	3	4	5
42. I often point out the potential risks or hazards of a team plan or course of action	1	2	3	4	5
43. I help people move beyond their disagreements and find common ground	1	2	3	4	5
44. My teammates often view my suggestions as creative or innovative	1	2	3	4	5
45. I often serve as a liaison between my team and outside groups	1	2	3	4	5
46. I promote my team's mission and goals with other teams or units.	1	2	3	4	5
47. I can typically provide a strong rationale to refute ideas that I believe are unsound	1	2	3	4	5
48. I encourage my teammates when I know they have a difficult assignment or challenge	1	2	3	4	5

Scoring Instructions for TREO Questionnaire:

- Organizer: 5, 8, 17, 18, 26, 28, 30, 36.

- Doer: 3, 12, 15, 16, 21, 24, 25, 41.

- Challenger: 2, 4, 9, 10, 14, 32, 42, 47.

- Innovator: 6, 13, 27, 29, 33, 35, 38, 44.

- Team Builder: 7, 11, 19, 37, 39, 40, 43, 48.

- Connector: 1, 20, 22, 23, 31, 34, 45, 46.

Sample Interview Form

Interviewer Name: Interviewer Position:

Candidate Name: Interview Date:

OPEN THE INTERVIEW
Introduce yourself and welcome the candidate.

Provide a brief overview about the foster team and its purpose in the shelter/rescue.

Read the following statements to the candidate:
- **"I will be asking you to share specific examples from your work or volunteer experiences."**
- **"Take your time to think of your best examples and focus on specific actions you have taken rather than what you generally do or typically do. When describing an example that involves others, be sure to focus on the role you played."**
- **"At times, I might move along to the next question or ask probing questions to get everything I need."**
- **"I will be taking notes throughout the interview."**
- **"Do you have any questions before we start?"**

1. **Keeping the Team on Track**
Monitors teams' and teammates' progress and ensures that they are meeting necessary deadlines.

Lead Question

Tell me about a time when you were working in a group and you helped ensure the team was progressing towards it goals.

Probing Questions (Ask the Lead Question first. Wait to ask the Probing Questions as needed)
- What specifically did you do in the group to help keep them on track?
- How did you know your team members were contributing to the team's goals?

Notes

1	2	3	4	5
Ineffective	Limited Competence	Solid Competence	Advanced Competence	Master or Role Model

2. Interacting with Teammates
Provides positive interactions within the team that contribute to a supportive environment

Lead Question

Tell me about a time when you were working in a team where the group members disagreed about something. How did you help resolve this conflict?

Probing Questions (Ask the Lead Question first. Wait to ask the Probing Questions as needed)
- What specifically did you do to manage this conflict?
- What actions did you take to reduce the conflict in the group?

Notes

1	2	3	4	5
Ineffective	Limited Competence	Solid Competence	Advanced Competence	Master or Role Model

Appendix 3. Sample Protocol for Conducting After Action Reviews with Foster Teams

1. Foster team or liaison identifies an important event

    a. Events are often key instances of team performance

    b. Events can reflect successful performance (e.g., adopted pet) or unsuccessful (e.g., returned pet)

2. Team members asked to reflect on event independently

    a. Team members could be asked to provide written responses to the following questions:

        i. What happened during this last performance episode?

        ii. How do you think the team did?

    b. Along with these open-response questions, team members could be asked to rating the following statements about their group's self-managing behaviors on a scale of 1 (*not true at all*) to 5 (*totally true*) (Rousseau & Aube, 2010):

        i. We plan the accomplishment of our work activities

        ii. We clarify roles and responsibilities for each member

        iii. We assess the effectiveness of our team functioning

        iv. We monitor the results of our work

        v. We congratulate our teammates when they do well

        vi. We recognize the contributions of our teammates

        vii. We search for better ways of working

        viii. We put into place new practices to do our work

3. Facilitator collects and reviews individual team members' responses:

    a. Where are the areas of consensus and/or disagreement?

      b. What topics are most and least relevant for the team's continued success?

4. Discuss as a group with facilitator:

      a. Key strategies:

            i. Focus on teamwork not task work

            ii. Refer back to team's charter for topic ideas

            iii. Strive to address important or controversial issues early during meetings

      b. Example questions:

            i. Assessing common understanding:

                1. What was supposed to happen?

                2. What actually happened?

                3. Why were there differences?

            ii. Generating reflection about performance:

                1. What worked?

                2. What didn't?

                3. Why?

5. Seek commitment or consensus around action plan

      a. Identify, record, and commit to action plans and agreements

      b. This document, like the team charter, may be formalized and even incorporate team members signature as a means of increasing their commitment to the plan.