ISD'S ACTION TEAM MANAGEMENT PROCESS

Team Management Guidelines and Tools

SYSTEMIC, SYSTEMATIC IMPROVEMENT THROUGH CROSS FUNCTIONAL PROJECT COLLABORATION AND MANAGEMENT - Project Portfolio Management

The biggest factor determining whether a project will succeed is the composition of the project team. The right mix of people will help you achieve all of the goals set forth in the initial project charter. It's essential that you get input from everyone with any kind of stake in the project, whether they are part of your core team or extended team. Core team members can have sub-teams to assist in providing expertise needed as the project proceeds.

What is an action team?

An A**ction Team** is a group of people working collaboratively to address a problem or an opportunity for improvement. Both cross-functional teams and collaborative teams are action teams.

Why are Action Teams needed?

Our success depends on all of us working efficiently and effectively together. This requires significant collaboration of the expertise throughout the District to plan, deploy and assess progress of mission critical projects.

What is cross functional project management?

Cross functional project management is a method for addressing systemic issues that require multiple perspectives. It is used by large-scale organizations in transformation and improvement efforts. Cross-functional organizational design teams act as architects of change by involving key stakeholders in the design and deployment of processes.

What is a Cross Functional Team?

A **cross-functional team [CFT]** is a group of people with different functional expertise working towards a common goal and sharing the responsibility for the work and the results. A CFT addresses planning of Design or Deployment Planning or Implementation of a District-wide initiative. It may include people from Leadership; Finance; Operations; Communications; Technology; Human Capital Management; Student Supports; Learning; Program Efficiency, Effectiveness and Sustainability; etc. Typically, it includes employees from all levels of an organization. Members may also come from outside an organization depending on the task. A CFT project is formalized through a Project Charter that describes background, purpose, parameters of the project and members. Team Members of CFTs attend every meeting and have a shared responsibility for the CFT's results.

What is a Collaborative Team?

A **Collaborative Team [CT]** addresses routine projects that require collaboration with more than one department to have efficient, effective deployment. The CT Project team leader is the process owner. CT Leaders work from a statement of outcomes, measures and evaluation criteria, rather than a charter. The CT Leaders may have all the stakeholders meet together or work individually with appropriate stakeholders. CT Leaders are responsible for evaluating the project effectiveness and reporting on the results to Cabinet. Their evaluation serves to determine changes for the following year in the project.

What is the difference in a Cross Functional Team and Collaborative Team?

A CFT requires Cabinet approval, a Cabinet Sponsor, a Team Leader and members from multiple departments. CFTs work is outlined in a charter and includes deliverables, timeline, agendas and minutes. Project/ Process Owners initiate CTs to ensure key stakeholders have input for effective deployment and follow through of repetitive projects.

What are the requirements for cross functional project management to be successful?

The keys to successful cross-functional project teams include

1. **District Leadership Project Prioritization** based on the organizational energy, impact on strategic goals, and capacity of the system.   Selection based on what is best for FWISD as a whole.
2. Clear understanding of each project using **Project Charters** [Appendix A] that prescribe the outcomes, set the parameters, identify the required expertise for successful planning and deployment, reporting timelines, and resources.
3. **Balancing plans with ongoing workloads**
4. **District Leadership monitoring / governance structure** to align ongoing support for project success [alignment is not a onetime step performed at the start of a project; it's an ongoing process]
5. **Project reporting of short cycles of PDSA** to assess progress and capture learnings
6. **Final PDSA report capturing leanings** of the most successful methods and OFI for future project chartering, management and
7. **Celebration** of learnings and work of the team.

How do I charter a Cross Functional Project Team?

Cross functional Teams [CFTs] impact many parts of the organization. CFT Charters will be vetted by the Superintendent's Cabinet to ensure:

1. Balancing of priorities
2. Functional support and resources for project success
3. Right tem membership for successful planning, deployment and progress monitoring
4. Assignment of decision making authority needed for team to make timely progress

What roles do Cross Functional Teams need to have to support their success?

Sponsor: member of Superintendent's Cabinet who envisions and oversees the project. Sponsor outlines the project with outcomes, parameters, and timeline. Sponsor oversees the process, addresses resource needs and roadblocks, and arranges for periodic updates to Cabinet on CFT progress. Sponsor works with the Team Lead in setting acceptable deliverables. Sponsor ensures the CFT work is captured in an action plan and uploaded to action plan reporting system.

Team Leader: works with Cabinet member and PE2S Project Manager in planning the team meeting process, runs the team meetings, ensures there is an agenda and minutes with action items posted for each meeting

Scribe: captures key discussion points, action items with who, what, when and how reported during meeting; ensures meeting minutes are sent to team following the meeting; posts minutes in the team folder; arranges for a substitute scribe when they being absent from the meeting is unavoidable

Team Members: serves as the expert voice for the component of the organization that they represent; gathers input from their component; provides updates to all of their component's members; *attends every meeting*

Team Member Supervisor: supports **team member** in being a two-way communicator, addresses calendar conflicts so that team member can attend all meetings

Outside Experts: Team Leader invites expertise from outside the team as needed for the project outcomes to be successful; experts come as needed to provide insight, data, etc., as needed by the team to ensure its success

Project Team Coach / Support: provides support, expertise and best practices in project management to the Sponsor and Team Leader in planning the process; attends CFT meetings; offers insights in team management processes

Time Keeper / Parliamentarian: [optional] member of the team who works to support the process; helps Team Leader keep the meeting on track and on time

Which role is most important?

All roles are important to the success of the team.

What are my responsibilities as a core team member?

Team members provide expertise to the project. Core Team Members have a two-way communication responsibility. They work with their supervisor to establish a process for

1] Providing expertise to the team for the area that they represent.

2] Being the voice for the Department that they represent. This often requires that they gather input from their peers so that they can communicate all appropriate information.

3] Providing updates to their supervisor and their peers so that everyone is aware of the progress of the CFT and has input that informs the CFT of critical information that support their work and ensure the effectiveness of the process.

Why is it important for core team members to be at each meeting?

The biggest factor determining whether a project will succeed is the composition of the project team. The right mix of people will help you achieve all of the goals set forth in the initial project charter, but only if those members are continually involved in all the collaborative work of the team.

Does every stakeholder group have to be represented on the core team?

It's essential that the team has input from everyone with a stake in the project; however, all stakeholder groups may not be part of the core team. Core team members can have sub-teams to assist in providing expertise needed as the project proceeds. Team Leaders can arrange for outside experts to address the team as appropriate.

Does every Cross Functional Team take a project from beginning to end?

Not always. Projects can have phases and CFTs can be designated to address a specific phase of the planning. Some team members may be on a Design Team and have their work complete. A Design Team CFT would have a Deployment CFT that would include users of the process so that focuses on the deployment of the design. The Deployment CFT addresses deployment issues to refine and address corollary support needs for the process to be successful. An example : Design Team considers the content needs of the projects including the guidelines of law, regulation, Board policy and Local Policy. The Design Team would identify impacted positions, key components of the deployment including outcomes for key milestones, fidelity checks and the evaluation criteria. The Deployment Team would address the specifics of deployment by position with timelines that would include professional development, fidelity monitoring, data gathering, and reporting of progress.

Cross Functional Team Tools Definitions with examples in the Appendices

1. Project Team Charter — Appendix A
2. Process for "Establishing and Launching a CFT" — Appendix B
3. Milestones / Timelines [Gantt Chart] — Appendix C
4. Team Development — Appendix D
5. Roles and Responsibilities Protocol — Appendix E
6. Team Norms — Appendix F
7. Agenda — Appendix G
8. Minutes — Appendix H
9. Reporting Cadence — Appendix I
10. Parking Lot — Appendix J
11. Issue Bin — Appendix K
12. Team Deliberation / Team Share Process — Appendix L
13. Action Plan — Appendix M
14. Plus Delta on Meeting Process — Appendix N
15. Team Orientation PowerPoint — Appendix O
16. Team Reporting PowerPoint for Cabinet Updates — Appendix P
17. Team Reporting Executive Summary for Cabinet Updates — Appendix Q