"Shared Team Roles" Learning Object

Link to online version: https://fl-rda.org/shared-team-roles-learning-object/

Title	Shared Team Roles
1-sentence summary	An activity to empower all members of a team to contribute.
Time to implement	10-15 minutes *(for a group of 5 or so members)*
Purpose of tool	● Bring awareness to social roles that members can play to promote teamwork ● Increase the motivation and engagement of team members by highlighting informal, non-technical ways they can contribute ● Proactively identify gaps on a team to be filled by members or resources
Example output	
The steps	1. Introduce the activity as a way for team members to learn more about how they can each contribute to the group in fostering a positive working environment. Note that the team roles that will be discussed in this activity relate to supporting how the team works together, emphasizing the importance of non-technical roles in addition to technical expertise. 2. Present the table from the **Shared Team Roles worksheet** listing team roles and definitions for members to read through. They will shortly be indicating the roles they would like to play on the team. Allow a couple of minutes for all to review the table quietly and consider ways they may contribute. 3. After the reading period, all team members should select and write their name next to up to three roles in which they envision contributing most to the team. *(Ideally, this table is presented in a shared document format so members can add*

The Example output table contains:

Role	Definition	Member(s)
Organizer	Keeps track of accomplishments and progress.	Mikel, Fariha
Doer	Gets things done.	Alfred, Fariha
Challenger	Often asks "why," debates and critiques.	Anita, Alfred
Innovator	Generates new and creative ideas, overcomes challenges.	Silvia
Team Builder	Helps maintain positive work atmosphere.	Anita
Connector	Connects with stakeholders outside team.	Silvia, Mikel

	their names directly into the table live at the meeting, or can verbalize their selections and have one person document their selections in a common table.) 4. Have the group reflect on the results. Each team member can briefly explain why they chose each role for themselves. It is also helpful for the team to note roles that have many names (lots of strength in that role area) as well as roles that have only one or no name (limited or no strength in that role area). In this latter case, the team may consider whether that role is critical to the team's functioning and how they will fill that need. *(See the "What should I do next?" section below related to filling gaps on a team.)*
Key guidance	• Every member of the team must sign up for at least one role, acknowledging that roles are dynamic and may change over the course of a collaboration. • It is beneficial to have each team member focus on the one to three ways in which they can best contribute to the team. Focusing on the "top" contributions of each member prevents the risk of members signing up for every role, diluting the full benefits of the activity. • If members of a team know each other, it is acceptable for members to nominate each other for particular roles if those are known strengths of theirs.
The outcome	**A written product** in the form of a table filled in with group member names next to the major social roles they envision playing on the team. **A better understanding** of the ways in which each member of the team can contribute, as well as identification of any skill sets that may be lacking on the current team (i.e., roles that do not have any names, or only one name, next to them) in relation to team building. *(See the "What should I do next?" section below related to filling gaps on a team.)*
Example use cases	Two example use cases for this activity are listed below. The first relates to how this activity can be integrated into a group launch meeting, and the second relates to engaging an external support person as part of a group. **Launch Meeting** This activity helps members of a new team get to know each other, a form of icebreaker. For example, a team launch meeting may be convened at the start of a project to plan how each team member will be engaged in the project and interact with other members of the team. As part of the launch meeting agenda, perhaps after the main purpose and overall timeline of the project has been discussed, this activity can be scheduled. This activity provides the opportunity for

	all members of the team to indicate how they would like to contribute, emphasizing that they will be encouraged and expected to contribute in one or more ways.
	External Team Support
	A roles activity like this one can also help clarify how an external facilitator or support personnel can support a team, as well as make them feel more included. An example of this is when a Research Development or Research Administration professional (or some other outside support person or facilitator) is involved in supporting a research team writing a grant proposal. Involving the external person in this activity provides an opportunity for that person to fill needs on the team. A modification of this activity may involve having team members complete the activity and then showing the completed table to the external support person, requesting their assistance filling needs (i.e., roles with no or only one name listed). If involving the support person in the activity itself, it provides an opportunity for them to express their strengths and uncover unexpected ways they can enhance the team's goals.
Q&A:	
- When should this be applied?	This is an excellent activity to do with a **newly-formed team**, in a group that does not know each other well. It can serve as an icebreaker activity for the purpose of learning more about the preferences and underlying strengths of each team member for contributing. For teams with more history, this activity can be a way to reorient to a new task or as a reset if the team wishes to change how roles on the team are distributed. It works best with relatively small teams (<10 members). It should include members who will be decently engaged with the team going forward, not those who have only a very small part in the team's future work. The overall goal is to make the teamwork space a positive one and promote team cohesion.
	Since this activity highlights ways in which all members of a team can be actively engaged in not only the task-related but team-related parts of a project, it is an especially good activity for **virtual or long-term teams** that may struggle with sustained member participation. The listed roles provide more avenues for members to engage and contribute to the team that are longer lasting than the tasks at hand (especially, for example, if their part of the project is currently under development or on hold). The activity explicitly tasks members with the role of helping to create a positive team environment, where productive dialogue and debate can occur. Defining these roles and fostering a positive work culture may make members more likely to attend virtual meetings, sign up for tasks and responsibilities, and feel they can contribute to the group.

		Given the requirements of the activity for all members to sign up for at least one role, this intervention can give voice to **quieter members** who may struggle to sign up for tasks. This group activity may empower them to sign up for tasks related to their expressed role, and may also empower others on the team to call on that member when tasks related to their preferred role arise. A facilitator for this activity can also help make space for quieter group members. This is a great activity to do with a group with diverse affiliations, including members from **non-academic and community groups**, as it uses intuitive language and provides opportunities for all members to contribute in ways beyond technical expertise.
-	When *not* to use this?	For teams that follow a more **traditional hierarchy**, where a leader (or small leadership team) is responsible for a majority of the planning and implementation activities, this activity may not be as useful. In this case, it may mistakenly invite other team members to contribute in areas that the team leader(s) is already managing. However, when more shared responsibility, especially over the social aspects of the team, are open for all members, this activity would be valuable. A roles activity like this one is likely most useful for teams that will be engaged with each other over an extended period of time (e.g., months). For teams **convened for short-term purposes**, an activity that prioritizes uncovering topic-relevant assets and resources held by members may be more pressing. This activity may not be as valuable to do with a **large team** (e.g., over 15 or 20 individuals) as there will be significant redundancy, with many members signing up for a given role. It is likely more useful for smaller teams (or subgroups in larger teams) getting to know each other's strengths and preferred ways to contribute and interact in the group.
-	What should I do next?	A **gap in the team** may be identified if no members (or only one member) write their name next to any of the listed roles. Certainly, the team may decide the role is not essential, either now or ever, for the team. If the role is an important one, the next step may be to invite a new member to join the group to fill the gap. If the group does not want to or cannot add additional members, they may seek out opportunities for current group members to "upskill" in order to fill the gap. Alternatively, a resource or software program may be accessed by the team in order to address the gap. A **follow-up exercise** would to be have members of the group reflect on or complete the "[TREO assessment](#)" (see pp. 27-29 in the article) on which this activity is based. The assessment asks a series of questions that then classify individuals into the roles listed

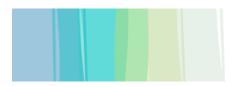|	
	in the table for this activity. When considering how to fill this role to its fullest, or how to recruit members to fill a role with a gap, members could read through the assessment statements to better understand the behaviors and skills related to each role. Alternatively, the TREO assessment could be done prior to this activity if you want team members to reflect independently on the roles they could play *prior* to a group meeting. A **next step activity**, now that team members have started thinking about the different ways they will interact with each other, would be for the team to **draft a Collaboration Agreement**. Similar topics such as roles and responsibilities, communication and team processes, and conflict resolution will be covered in a collaboration agreement. Content from this activity table could be incorporated into such an agreement. It may be helpful to **revisit and edit the roles table** with listed member names at points of transition. For example, if members leave the team, are there role gaps that are revealed? Or if new members are added, how will they feel part of and contribute to the team?
- What evidence or sources is this based on?	This activity was developed from research investigating the propensities of team members to engage in various roles. See Table 2 in Mathieu and colleagues' publication (2015, p. 16) for their listing of team roles and definitions, from which this activity was adapted. • Mathieu, J.E., Tannenbaum, S.I., Kukenberger, M.R., Donsbach, J.S., & Alliger, G.M. (2015). Team role experience and orientation: A measure and tests of construct validity. *Group & Organization Management, 40*(1), 6-34.
- What if I want to learn more? What are other complementary tools?	To consider additional topics related to how to prepare oneself to contribute to a team, see Chapter 2 in the ***Collaboration and Team Science Field Guide***.

Shared Roles Worksheet

An activity to empower all members of a group to contribute

For guidance on using this tool: https://fl-rda.org/shared-team-roles-learning-object/

Role	Definition	Member(s)
Organizer	Acts to structure what team is doing. Keeps track of accomplishments and how team is progressing relative to goals and timelines.	
Doer	Takes on work and gets things done. Can be counted on to complete work meet deadlines, take on tasks to ensure team's success.	
Challenger	Pushes the team to explore all aspects of a situation and consider alternatives. Often asks "why" and is comfortable debating and critiquing.	
Innovator	Regularly generates new and creative ideas, strategies, and approaches for how team can handle situations and challenges.	
Team Builder	Helps establish norms, supports decisions, and maintains positive work atmosphere. Calms stressed members and motivates them when down.	
Connector	Bridges and connects team with stakeholders outside team. Ensures good working relationships between team and "outsiders"	

Shared Roles Table Example

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