



Module 8.2 Project Leader Maintenance

Formation Stage Tasks

1. Understand How to implement the Formation Stage and move the team into the Criticism Stage

STAGE 1 - FORMATION

“Honeymoon “ period

Excitement, anticipation, and optimism

Initial, tentative commitment to the team

Suspicion, fear, and anxiety about ability to accomplish the task

Skepticism about what roles team members will play on team

Idealistic discussion of concepts and issues

Impatient about having to discuss the process

Complaints about barriers to the task

Resistance to building team, focus on task

Team members strengths and weaknesses are discussed but not accepted

Ground rules and mission statement are established

Challenge – creating a purpose and managing team membership.

What does it look like? Team members are reserved and polite, acting their best to create a good first impression. Conflict is avoided because of the need to be accepted into the group. There may be a sense of excitement and opportunity, but also cautiousness and uncertainty about the future. Team members reflect not only on the tasks at hand, but also about each other. Initial ground rules are established as the team begins to discover how to work together.

Feelings - Team members are usually excited to be part of the team and eager about the work ahead. Members often have high positive expectations for the team experience. At the same time, they may also feel some anxiety, wondering how their personal agenda will fit into the team and if their performance will measure up.

Behaviors – Team members are inquisitive, asking a multitude of questions, reflecting both their excitement about the new team and the uncertainty or anxiety they might be feeling about their place on the team. They share insights into personal and group process and are aware and share their own (and each other's) strengths and weaknesses. Team members explore how they will work together by identifying the boundaries of both interpersonal and task behaviors. Time is spent assessing other team members and their commitment to the

project. Team evaluates potential risks and rewards. Time is spent establishing relationships with leaders and other team members.

Team Tasks - The principal work is to create a team with clear structure, goals, direction, and roles so that members begin to build trust. To develop a good orientation for team members, the team discusses the development of ground rules and their personal expectations of themselves, the team, the project, and any other person involved in the project. These discussions help to ground the members in terms of the team's mission and goals, and can establish team expectations about both the team's product and, more importantly, the team's process. During the Formation stage, much of the team's energy is focused on defining the team so task accomplishment may be relatively low. Having the project leader create weekly activity lists allows the team to move in a specific direction.

Questions - What are we supposed to do together?

Do I want to get involved in this?

Is everyone committed to this?

How can I contribute?

What is expected of me?

What are the pros and cons to being on this team?

What are the personal agendas of the other team members?

Will we get along?

What will you contribute?

Can I trust you?

1. Implement the Team Formation Model (Module 6)
2. Learn Effective Meetings (Module 7.1)
3. Discuss with the team Time Management and how the members deal with their personal time management techniques

Formation Tasks

1. Get to know each other through conversation and Structured Informational Sessions.
2. In the Formation Stage the Leader is responsible for initiating the structure of the team. As the leader, you are responsible for the following:
 1. Organizing and Defining Relationships in the Team
 2. Assigning Specific Tasks
 3. Specifying Procedures to Follow
 4. Scheduling Work
 5. Clarifying Expectations of Team Members
3. The Leader is responsible for developing a written list of task (Activity Lists) to be delegated, showing the flow and time management of the tasks the team is performing and updating it as needed as well as deciding on a format that works for your team.

4. The Recorder will be responsible for keeping team records, i.e. Weekly Progress Reports.
5. Gather information about the team members. Here are some areas that should be covered when making your assessment: Competencies (strength and weaknesses), Expectations, Intercultural Behavior, Time Management, and Conflict Styles
6. Create a format to run effective Meetings.
7. Create Concrete Goals for the project and plan a Systematic Approach to reaching your goal. Using the overall goals decide what pressures, outside support, or stresses will be affecting the team (Logical Framework)
8. Create a List of Milestones for the project.
9. Be Directive while leading in the Formation Stage because members are apt to be lofty and abstract in this stage or look at the Formation Stage as pointless and show impatience with the process. Team Members usually exhibit low competence at this stage and high commitment.
10. Create Ground Rules and refer to them to keep the team on purpose. Refer to them when describing the team's activities in the Weekly Progress Report.
11. Have open discussions about complaints and use your Conflict Management System created in your ground rules to address these complaints.
12. Report all the above Formation Activities in the first Weekly Progress Report.
13. The team leader should check how much time other team members actually spent on the task activities and whether the time estimates were correct for the task. If not, adjustments must be made to the time management plan. Discuss thoroughly what inside and outside influences affected the team's efficiency. After a milestone is reached, meet and examine how the team members used their time. In the beginning, there will probably be a discrepancy between the time the team expected to use for specific activities and the time actually required. These findings can be used to continually refine estimates of the time required to carry out specific tasks in your action plans.
14. When roles are rotated, the leader should prepare for the Transition Meeting.