Best Practices in Multi-Stakeholder Team Science

SECTION: *WORKING AS A TEAM*

Learning Area: *Best Practices in Multi-Stakeholder Team Science*

For an introduction to the role of multi-stakeholder teams in conducting patient-centered outcomes research (PCOR), click here. Tuckman's model of team development suggests that there are actions that teams can take to become fully performing groups. Many of these actions happen in the early stages of the team when it is forming.

In addition to getting to know one another, team members need to agree on several important aspects of how they will work together. These include a clear sense of what the team wants to achieve, a clear sense of who does what, and specific standards to guide how the team will work together. At the start of the study, team members should collectively develop:

- **A shared vision.** Diverse teams have diverse interests. Team members must work together to bridge these interests and create a clear, shared vision to guide the team's work.
- **Team members' roles and responsibilities.** Defining clear roles and responsibilities can help team members work together and clarify who is doing what and when activities will occur.
- **Team norms.** Norms developed and agreed on by the full team can promote respectful interactions and help team members work together productively.

▶ Learn More about how Teams Can Set the Groundwork for Working Together Successfully Through:

- **Creating a shared vision.** Developing a shared vision of the research project that keeps everyone working toward the same goal.
- **Defining roles and responsibilities.** Defining the roles and responsibilities of each team member and clarifying roles to the entire team.
- **Establishing team norms.** Establishing cooperation, collaboration, and productivity as team norms.

Creating a Shared Vision

To guide decisions and activities, and to help team members work well together, team members need a single, shared vision for the research study.

What is a Shared Vision?

A **shared vision** is a common goal or goals that all team members understand and find valuable. A shared vision allows the team to map the steps and milestones to achieve that vision. All team members should contribute to develop the shared vision so that it reflects everyone's needs and interests.

Two best practices can help teams create a shared vision.

Best Practice 1: Using a Historical Timeline to Help Develop a Shared Vision.

Creating a **historical timeline** is a practical way for teams to begin to develop their shared vision. Historical timelines help team members see what is already known about the topic, how the topic has changed over time, and what remains unknown. Historical timelines highlight important terms, research findings, and events in the order in which they occurred. For example, a historical timeline of heart failure treatments might show how doctors have treated the condition for the past several decades, and how certain discoveries led to changes in diagnosis, treatment, and management. The timeline might include major studies, new approaches, and policy or guideline changes.

To create a historical timeline, follow these steps:

1. The facilitator or discussion leader draws a long horizontal line on a large piece of paper or white board.
2. The entire team collaborates to capture the progression of knowledge and evidence related to the topic of study on the timeline. Key information can include information on the prevention, diagnostic, treatment, or management options available to patients. Events may include items ranging from newsworthy events to advocacy activities to research evidence.
3. The team places their study on the timeline. This helps everyone understand how their research study contributes to the larger body of knowledge and practice on the topic.

Best Practice 2: Developing a Shared Vision Statement.

Using the historical timeline as a resource, the team can begin developing its **shared vision statement**. A team's shared vision statement is a simple, one-sentence statement of what the team wants to accomplish together. Team members should revisit their shared vision statement throughout the study to anchor the team's day-to-day work in its original shared vision.

Defining Roles and Responsibilities

Clearly defining roles and responsibilities for all team members helps teams function well together. Clear roles and responsibilities allow all team members to understand what others are working on, when activities will occur, when to depend on or interact with others, and when to work independently.

A team member's **role** is his or her position or function on the team.

A team member's **responsibilities** are the specific tasks or duties that he or she is expected to carry out as part of his or her role.

All team members should have clearly defined roles and responsibilities for every activity or task that involves them. Team members should start by acknowledging differences in backgrounds and expertise and reaffirming the value of every team member and their role.

Two best practices can increase team member engagement in the shared vision and overall project.

▶ Best Practice 1: Identify Roles and Responsibilities as a Team Using a Visual Map of the Study.

Visual maps show all the parts of a study, how they fit together, and where the team is currently in the study process. Visual maps can also identify who is involved at which stages, allowing team members to see where their contributions fit.

To create a visual map, follow these steps:

- Identify each specific study activity, from planning to sharing study results.
- For each activity, discuss what needs to happen to make this activity possible.
- Once the list of activities is complete, "map" each activity in order, noting where activities depend on each other or occur at the same time.
- For each task or activity on the map, discuss the skills or perspective needed.
- Have team members identify themselves and other team members who have the skills or perspective needed for each task or activity.
- Assign team members to tasks by adding their names to the map.

▶ Best Practice 2: Discuss Job Descriptions for Each Role on the Project.

Discuss job descriptions for each team member on the project by following these steps:

- Specify the role of each team member, such as principal investigator, project manager, advisory panel member, steering committee member, co-investigator, or consultant.
- List the stages of research where each role will be active.
- List the specific responsibilities associated with each role.
- Clarify who will coordinate each task by, for example, answering other team members' questions for that task or providing resources to those working on that task.
- Assign (or re-assign) roles and responsibilities to team members and subcommittees.

Establishing Team Norms

Team members will likely represent different personal and professional backgrounds, cultures, languages, skills, and perspectives. Together, team members must develop norms to bridge these differences and establish desirable behaviors for the team. **Norms** are a set of rules or guidelines that a team establishes to shape the interaction of its members with each other. Norms can help team members get along and interact respectfully, which can promote success toward the team's goals.

Teams should establish team norms early in the study process. The norms should be formally agreed on and written down. Team members should revisit their norms frequently (for example, at the start of each meeting) so that norms remain fresh in everyone's minds and can guide team interactions. Referring to the team's norms can be a gentle reminder if a team member behaves in a way that does not reflect those norms.

To create team norms, teams should:

- Hold a discussion early in the study process.
- Share ideas about team norms.
- Identify similarities and differences in team members' ideas about norms.
- Come to agreement on norms for the whole team.
- Discuss which team norms may be difficult for various team members.
- Discuss what should happen when norms are violated and how to hold each other accountable.

Sample Team Norms or Guidelines

These are sample team norms or group relationship guidelines that real, working teams have selected for their own use. Perhaps they will assist you in creating your own team norms.

- Treat each other with dignity and respect.
- Transparency: Team members should avoid hidden agendas and practice a consistent commitment to sharing all the information they have.
- Be genuine with each other about ideas, challenges, and feelings.
- Trust each other. Have a shared expectation that the issues discussed will be kept in confidence.
- Managers should commit to creating and maintaining space in which people have information and are comfortable asking for what they need.
- Listen first to understand, and do not be dismissive of the input received when listening.
- Practice being open-minded.
- Do not be defensive with your colleagues.
- Express disagreement with an idea and not the person sharing the idea, also known as productive disagreement (see Leading and Contributing to Team Decisions in the Working As A Team section of the website).
- Rather than searching for the guilty, give your colleagues the benefit of the doubt.

- Share authority and decision making; think of the overall good for the team.
- It is okay not to know the right answer and to admit it. The team can find the answer.
- Practice and experience humility—each team member may not have all the answers.
- Be accountable and responsible for the team and to the team.
- It is okay to be the bearer of bad news; expect a problem-solving approach, not accusation
- Come prepared for and on time to meetings out of respect for the time and effort of others.
- Strive to continuously improve and achieve the team's strategic goals. Do not let ineffective relationships and interactions sabotage the team's work.

Source: Heathfield SM. How and Why to Create Team Norms: Adopting Guidelines for Team Member Relationships. Updated January 14, 2019.