# TEAM BUILDING TOOLKIT

*Developed by Kathy Mendonca and Suzy Thorman*
*Berkeley People & Culture, People & Organization Development*

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# Stages of Team Development

One of the most influential models of teamwork theory was first developed by Dr. Bruce Tuckman in 1965. Ten years later, he refined the model to include a fifth stage, Adjourning. Understanding its five stages can help you develop a high performing team.

The model shows that as a team develops, relationships between members becomes more stable and the team increases its ability to perform. The amount of time that a team spends in any one stage and the number of times they cycle back through the stages will vary depending on the make-up of the team, the environment and the leadership. Based on what stage of development the team is in, the leader will change their leadership approach to best meet the needs of the team.
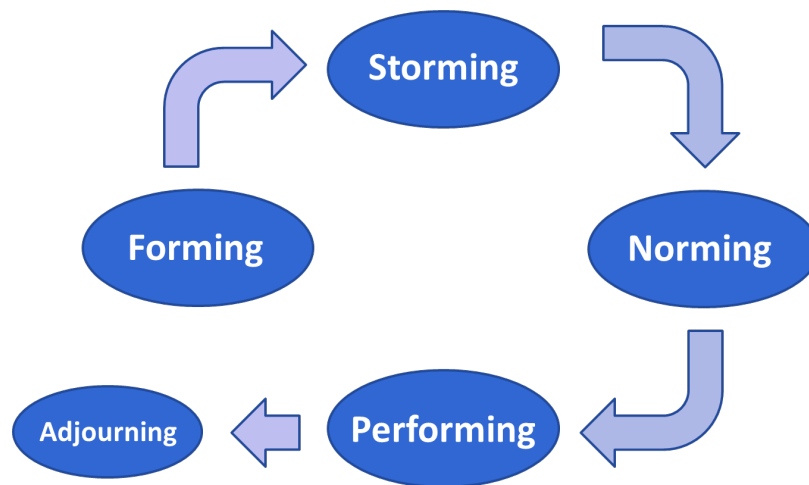


**Forming:**
In the Forming stage, team members are getting to know one another, and understanding the team's purpose and their roles.

**Storming:**
In the Storming stage, politeness begins to wear off and dissension occurs over basic mission and operating procedures.

**Norming:**
When team members recognize their differences and have dealt with them, they move to Norming, the stage when they ask, "How are we going to accomplish our work?"

**Performing:**
This is the final stage of team development. A high performing team is exactly that, a highly effective, problem-solving unit.

**Adjourning:**
As a project comes to an end or a team member leaves, the team moves into the Adjourning stage. This is not a developmental stage. It is the stage of closure.

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# Team Building at a Glance

## *Tools, Exercises & Resources for Each Team Development Stage*

| **Forming Stage** | | |
|---|---|---|
| **Focus:** Orientation<br>**Team Behavior:** Dependence on leader<br>**Leader Role:** Direct | | |
| **Leader Activities:**<br>• Outline objectives, roles, working procedures<br>• Communicate expectations<br>• Establish ground rules<br>• Learn about your team members<br>• Provide opportunities for team to get acquainted | **Team Exercises and Tools:**<br>• How to Run Successful Team Building Activities, pgs. 11-12<br><br>• Exercise – Staff Meeting Check-ins, pgs. 13-14<br>• Exercise – Meeting Opener – Pack Up Your Troubles, pg. 15<br>• Exercise – Shared Values, pgs. 16-17<br>• Exercise – Creating a Shared Vision, pgs. 18-19<br>• Exercise – Developing a Mission, pgs. 20-21<br>• Exercise – Hidden Treasure, pgs. 32-33<br>• Exercise – Group Resume, pgs. 34-35<br>• Exercise – A Penny for Your Thoughts, pg. 36<br>• Exercise – Sweet Stories, pgs. 37-38<br><br>• Tool – Setting Team Ground Rules, pgs. 22-23<br>• Tool – Project Charter Instructions & Template, pgs. 24-31 | **Resources:**<br>Organizational consulting, including support for strategic planning grow@berkeley.edu<br><br>Berkeley Rec Sports (custom trips and events for teambuilding – fee based) https://recsports.berkeley.edu/custom-trips-events/<br><br>University Health Services – *Healthy Meetings and Events* https://uhs.berkeley.edu/healthymeetings<br><br>Project Management Methodology (tool & templates) https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools<br><br>BPM workshop, see UC Learning Center:<br>• BPM 103 Creating an Inclusive Work Environment |

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| | | |
|---|---|---|
| | | • BPM 104 Communicating Goals, Objectives & Key Results<br>• BPM 209 Leading Change<br><br>Additional team building resources – see *Team Building Toolkit*, pgs. 76-77 |

## Storming Stage

**Focus:** Clarification
**Team Behavior:** Conflict
**Leader Role:** Coach and Mediate

| Leader Activities: | Team Exercises and Tools: | Resources: |
|---|---|---|
| • Encourage direct and frequent communication<br>• Establish communication guidelines<br>• Appreciate differences<br>• Surface, mediate, and resolve conflict<br>• Reassure team this behavior is normal | • How to Run Successful Team Building Activities, pgs. 11-12<br><br>• Exercise – Staff Meeting Check-ins, pgs. 13-14<br>• Exercise – Meeting Opener – Pack Up Your Troubles, pg. 15<br>• Exercise – Graffiti Feedback Board, pg. 43<br>• Exercise – That Guy & This Guy, pgs. 44-47<br>• Exercise – Blame Game, pgs. 48-49<br>• Exercise – Labels, pgs. 50-51<br><br>• Tool – Leader Actions for Dysfunctional Team Member Behaviors, pgs. 39-42 | Faculty/Staff Employee Assistance<br>510-643-7754<br>https://uhs.berkeley.edu/bewellatwork/employee-assistance<br><br>Staff Ombuds Office<br>510-642-7823<br>http://staffombuds.berkeley.edu/<br><br>People & Organization Development for *DiSC* onsite workshop - recognizing and appreciating work styles<br>grow@berkeley.edu<br><br>University Health Services – *Healthy Meetings and Events*<br>https://uhs.berkeley.edu/healthymeetings |

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| | | Project Management Methodology (tool & templates) https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools<br><br>BPM workshops, see UC Learning Center:<br>• BPM 202 Communicating with Impact<br>• BPM 203 Analyzing & Resolving Conflict<br>• BPM 206 Growing as a Coach<br>• BPM 207 Leading Change<br><br>Additional team building resources – see *Team Building Toolkit*, pgs. 76-77 |
|---|---|---|

## Norming Stage

**Focus:** Communication
**Team Behavior:** Cooperation
**Leader Role:** Facilitate

| **Leader Activities:** | **Team Exercises and Tools:** | **Resources:** |
|---|---|---|
| • Support members in their emerging roles<br>• Enable effective communication and flow of data<br>• Focus on listening and summarizing agreements | • How to Run Successful Team Building Activities, pgs. 11-12<br><br>• Exercise – Staff Meeting Check-ins, pgs. 13-14<br>• Exercise – Meeting Opener – Pack Up Your Troubles, pg. 15 | University Health Services – *Healthy Meetings and Events* https://uhs.berkeley.edu/healthymeetings<br><br>Project Management Methodology (tool & templates) |

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|---|---|---|
| • Provide positive and constructive feedback<br>• Reinforce collaborative work relationships<br>• Arrange a team-building event | • Exercise – Wisdom from Geese, pgs. 55-56<br>• Exercise – Toss Me Some Feedback, pgs.57-58<br>• Exercise – Hand Shake It Up, pg. 59<br>• Exercise – Celebrations That Reverberate, pg. 60<br><br>• Tool – Ways to Engage Participants in Creative Thinking & Dialogue, pgs. 52-54 | https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools<br><br>BPM workshops, see UC Learning Center:<br>• BPM 202 Communicating with Impact<br>• BPM 206 Growing as a Coach<br><br>Additional team building resources – see *Team Building Toolkit*, pgs. 76-77 |

## Performing Stage

**Focus:** Productivity
**Team Behavior:** Interdependence
**Leader Role:** Delegate

| **Leader Activities:** | **Team Exercises and Tools:** | **Resources:** |
|---|---|---|
| • Allow a high level of autonomy<br>• Turn over day-to-day responsibility<br>• Acknowledge successes and contributions<br>• Encourage professional development to enhance skills and motivate the team | • How to Run Successful Team Building Activities, pgs. 11-12<br><br>• Exercise – Staff Meeting Check-ins, pgs. 13-14<br>• Exercise – Meeting Opener – Pack Up Your Troubles, pg. 15<br>• Exercise – Turning Pressure into Performance, pg. 66<br>• Exercise – Picture-Based Scavenger Hunt, pgs. 67-38<br>• Exercise – Kudos, pg. 69 | Business Process Improvement – https://vca.berkeley.edu/business-process-management-office<br><br>People & Organization Development for *DiSC* onsite workshop - recognizing and appreciating work styles grow@berkeley.edu<br><br>BPM workshops, see UC Learning Center:<br>• BPM DiSC Assessment |

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| | | |
|---|---|---|
| | • Tool – Six Thinking Hats®, pgs. 61-62<br>• Tool – RAPID® Tool, pg. 63<br>• Tool – Gradients of Agreement Tool, pgs. 64-65<br>• Tool – Recognition Celebrations, pg. 70 | • BPM 208 Accomplishing More for Managers (priority and time management)<br><br>University Health Services – *Healthy Meetings and Events*<br>https://uhs.berkeley.edu/healthymeetings<br><br>Project Management Methodology (tool & templates)<br>https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools<br><br>BPM workshops, see UC Learning Center:<br>• BPM 205 Delegation Skills<br>• BPM 206 Growing as a Coach<br><br>Additional team building resources – see *Team Building Toolkit*, pgs. 76-77 |

## Adjourning Stage

**Focus:** Closure
**Team Behavior:** Loss or disengagement
**Leader Role:** Support

| **Leader Activities:** | **Team Exercises and Tools:** | **Resources:** |
|---|---|---|
| • Evaluate and review results<br>• Acknowledge and celebrate achievements | • How to Run Successful Team Building Activities, pgs. 11-12 | Employee Assistance for Faculty and Staff 510-643-7754 |

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| | | |
|---|---|---|
| • Bring closure to the project/team | • Exercise – Staff Meeting Check-ins, pgs. 13-14<br>• Exercise – Project Lessons Learned Session and Template, pgs. 71-73<br>• Exercise – My Message to You, pg. 74<br>• Exercise – Gift to the Team, pg. 75<br><br>• Tool – Recognition Celebrations, pg. 70 | https://uhs.berkeley.edu/bewellatwork/employee-assistance<br><br>University Health Services – *UC Berkeley Guide to Healthy Meetings and Events*<br>https://uhs.berkeley.edu/healthymeetings<br><br>Project Management Methodology (tool & templates)<br>https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools<br><br>Additional team building resources – see *Team Building Toolkit*, pgs. 76-77 |

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# How to Run Successful Team Building Activities - Tips for the Facilitator

**Step 1. Before: Select an activity that's good for your team**
- Start with a clear objective in mind.
- Plan on this activity being one of many small steps.
- Match your goal to the activity that will best help you get the results you want.

**Step 2. Before: Prepare for your team-building activity**
- Read through the activity several times.
- Obtain all necessary materials.
- Practice what you are going to do and say.
- Set up the room.
- Anticipate potential problems.

**Step 3. During: Explain the activity to the team**
- Set the mood.
- Explain the activity and why you are doing it.
- Outline the activities rules or steps.
- Distribute the materials after you have fully explained the activity.

**Step 4. During: Check for understanding before beginning**
- Make sure your team understands the activity.
- When the activity will result in one or more winners, make sure everyone is clear on what criteria will be used to determine who wins.
- Declare up front that you are the final judge on all disagreements about who wins.

**Step 5. During: Run the activity**
- Once they begin the activity, see that your team is following the steps or rules.
- Encourage and support them all.
- Make yourself available to clarify steps or redirect the team.
- Throughout the activity, watch for things you will want to bring up later during the Debrief.
- If the activity timed, watch the clock, and give a "time check" occasionally.
- Don't stop the activity unless it really runs amuck.

**Step 6. During: Debrief the activity**
- Ask the Debrief Questions outlined in the activity.
- Try not to call on anyone by name unless you have to. Be comfortable with silence.
- Watch for head nodding, smiles, and other indications that they agree with what is being said by others.
- If anyone gives an off-the-wall response or one that is just plain wrong, ask the team how they feel about it rather than correcting someone.
- Even if the activity did not go as well as planned, most participants probably learned something.

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**Step 7. After: Reinforce the learning back on the job**
- Display anything the team created for the activity back in the workplace.
- Refer to the activity and the lessons learned often when you are coaching, giving feedback, or conducting staff meetings.
- Watch for examples of how the participants used what was learned in the activity and got better results.
- Ask participants in your next staff meeting to share what impact the activity has had on them.
- If the activity was a great success, you may want to repeat it soon.

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# Staff Meeting Check-ins

**Objective:**

- Use this activity at the beginning of any meetings as ice-breaker.

**Materials:**

- No materials are necessary for this activity.

**Instructions:**

1. At the beginning of each staff meeting, before moving onto other agenda items, go around the table asking each person to briefly answer a pre-selected question.
2. Give participants a minute or two to think of something to share before beginning.

**Possible Questions:**

1. If you could pick a theme song for yourself, what would it be?
2. What do you most admire about the person to your left?
3. What do you consider to be the best thing ever invented? Why?
4. What is one thing you learned from your parents?
5. If you could move anywhere for one year, where would it be?
6. What is your most compulsive daily ritual?
7. What is the oddest job you have ever had?
8. What is your favorite way to spend a relaxing weekend day?
9. What are your behavioral pet peeves? What most annoys you or pushes your buttons?
10. In what way(s) are you superstitious?
11. Who is a famous person, living or dead, fictional or real, political, artistic, etc. whom you would like to have dinner with? Why?
12. What have you not done that you have wanted to do for years?
13. What's your dream job?
14. What are the most important qualities you look for in a friend?
15. What one goal (personal or professional) would you like to accomplish this year?
16. What part of your personality would you most like to change?
17. What is one fear you would like to overcome?
18. What is your favorite quotation?
19. What is the most beautiful place you have ever seen?
20. What negative experience have you had that turned out to be for the best?
21. If talent weren't an issue, what career would you choose for yourself?
22. What do you wish you had time to do every day? How could you make that time?
23. What is your favorite vacation spot? Why?
24. If money wasn't an issue, what career would you choose? Why?
25. What person in your life has had the greatest impact on you? In what way?
26. What is your one guilty pleasure?
27. What have you done in the past year that has been completely out of character for you?

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28. Explain the significance of one thing you are wearing or one thing you have on your person?
29. What is the thing you are the most interested in right now?
30. What is the most comforting (non-religious) thing you own?
31. What have you lost that you would most like to retrieve?
32. What was the best toy you have ever owned?
33. What is the single greatest act of kindness you have ever received from a stranger?
34. What is one of the simple pleasures of life that you truly enjoy, and why do you enjoy it so much?
35. What was your favorite board game as a child and why did you like it so much?

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## Meeting Opener – Pack up Your Troubles

**Objective:**

The purpose of this activity is to "let go" of continuing distracting concerns or problems, at the same time providing a vehicle to enable other team members to suggest solutions to those issues.

**Materials:**

- Paper
- Pencils
- Empty/clean receptacles or waste baskets

**Instructions:**

This activity can be used at any time during the regular staff or departmental meeting, team meeting, or any other type of meeting.

1. Introduce the exercise by acknowledging that most of us tend to have "nagging" work problems or concerns, or other distractions that just won't go away. Tell your team that this is the time to "pack up" those problems and toss them away for a while.
2. Ask each person to think of such a problem or concern -- either on the topic or subject being discussed or on any other general work issue that is bothering them. Caution against items of an interpersonal nature, e.g. frustration with boss, disagreements with a co-worker, etc.
3. Each person then writes his/her problem on a notepad or sheet of paper. They then "pack up" their troubles, i.e., crumple up the papers and toss them into the waste basket.
4. After all the papers are in receptacles, form groups of three and have one person from each group pick out a crumpled sheet from the basket.
5. The trio now "owns" that problem and is given three minutes to write down and discuss as many possible solutions as they can in that timeframe.
6. Each group then reads their problem to the whole team and reports their solutions. Solicit additional suggestions from others in the team.
7. Repeat this process as time allows or until all problems are addressed.

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# Shared Values

**Objective:**

The purpose for conducting a shared values activity is for team members to come to agreement on the most important values they share. This is useful when beginning a significant project or work effort; when individuals feel that others are not listening with open minds; or when team members need to bond together.

**Materials:**

- Paper and pens
- One piece of flipchart paper for each sub-team
- Colored markers

**Instructions – Part 1:**

1. Have each participant take two minutes to write down what he/she feels are the three most important values to your organization, department or team.
2. Explain that values include things such as commitment to customers, integrity, teamwork, leadership, quality focus, innovation, efficiency, respect, creativity, learning, and so forth.
3. Divide the group into sub-teams of four to six participants.
4. Have each participant share his/her three values within the sub-team.
5. From all the values shared, have each sub-team agree on their top three most important values.

**Instructions – Part 2:**

1. Provide each sub-team with a piece of flipchart paper and some colored markers.
2. Give sub-teams 10-15 minutes to create a poster with words, symbols, and/or pictures that reflect their three values.

**Instructions – Part 3:**

1. Have each sub-team present their poster to the entire team.
2. As a team, identify patterns and themes that emerge, and decide on a unified set of values for the team.

**Debrief Questions:**

1. If someone new to the organization/department/team saw this list of values, how do you think they would expect people to behave?
2. Do we behave like this
3. What can cause us to lose sight of our values? What can we do when that happens?
4. How would living these values help us meet our goals?
5. What implication does this have for us back on the job?

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*Forming Stage – Team Building Exercise*

**Tips for Success:**

- Encourage the sub-teams to be creative in their representation of the values.
- If a sub-team does not finish, ask what prevented them from doing so. Others will learn from their difficulties. Then ask how those barriers could have been avoided or dealt with effectively.
- In the coming days, periodically ask which values are being demonstrated on the job.
- If your team/department does not have a vision statement, have the team create a shared vision statement in a future team building session (see following pages).
- If your team/department does not have a mission statement, have the team develop a mission statement in a future team building session (see following pages).

*Forming Stage – Team Building Exercise*

## Creating a Shared Vision

**What is a Vision Statement?**

A vision statement is an aspirational description of the preferred future a team/organization seeks to create. It answers the question, "What do we really want?" Visioning generates a common direction, hope, and encouragement; offers possibility for fundamental change; and generates creative thinking and passion. A clear vision serves as the foundation for a mission statement, goal setting, and action planning.

**A Vision Statement Should:**

- Be created based on the "future" state
- Motivate and inspire
- Encompass fundamental beliefs and values
- Lead to distinctiveness
- Be succinct, clear, and unambiguous
- Be supported by the mission, goals, and organizational culture

**Options for Creating a Vision Statement:**

You can begin creating a vision with your team by imagining the ideal future state for the team or organization. Identify what you really want to accomplish and what would inspire people and make them feel proud.

**Option 1 – Creative Exercise**

- Step 1 – Individual Expression:
  Have each team member capture their vision, utilizing a creative method that is comfortable for them. Examples include: drawing, poetry, storytelling, etc. This may be a stretch for some, but it is important because visioning is born from the creative process.

- Step 2 - Identify Themes:
  Come together as a team to share individual contributions from the creative exercise. Use flip chart paper to list patterns and themes that emerge, looking for common words and images. As a team, discuss how these themes might fit together to create a unified vision.

- Step 3 – Write Vision Statement
  As a team, write a vision statement, based on the patterns and themes that emerged.

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**Option 2 – Large Group Brainstorm**

- Step 1 – Individual Preparation
  As an individual exercise, ask team members to complete a worksheet including at least the following four questions. Individuals may list any words, phrases, or ideas that come to mind. This exercise can be done as pre-work or at the beginning of your visioning meeting.

  - o  How will the team/organization look?
  - o  How will the team/organization feel?
  - o  How will the team/organization operate?
  - o  How will the team/organization act?

- Step 2 – Flip Chart Capture
  For each question on the worksheet, use at least one sheet of flip chart paper and have team members call out ideas that relate to that question from their individual preparation. Do not edit at this point. Suggestions should be noted and recorded until the energy level in the room begins to drop or as time permits.

- Step 3 – Identify Themes
  Post large sheets of captured items around the room and give everyone the opportunity to look at each sheet. As a team, identify patterns and themes that emerge, looking for common words and repetition. Discuss how these themes might fit together to form a unified vision.

- Step 4 – Write Vision Statement
  As a team, write a vision statement, based on the patterns and themes that emerged.

**Vision Statement Examples:**

To make a contribution to the world by making tools for the mind that advance humankind. - *Apple*

To be the gold-standard specialty coffee and tea company in the world with brands that attract a highly dedicated and loyal customer following. – *Peet's Coffee and Tea*

Our vision is to leave a sustainable world for future generations. - *The Nature Conservancy*

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## Developing a Mission

**What is a Mission Statement?**

A mission statement is a written, specific, easy-to-remember sentence, short list of bullet points, or paragraph (50 words or less) illustrating an organization's purpose and goals. The mission statement functions as a guiding tool for critical decisions that affect the direction of your team/organization, and articulate the specific action(s) necessary to realize the vision.

**A Mission Statement Should:**

- Express your organization's core purpose in a way that inspires support and ongoing commitment
- Motivate those who are connected to the organization
- Be articulated in a way that is convincing and easy to grasp
- Use proactive verbs to describe what you do
- Be free of jargon
- Be short enough so that anyone connected to the organization can readily repeat it

**Creating a Mission Statement:**

When developing a mission statement, be sensitive to the process as well as the end result. Brainstorming and creativity take time, so don't rush the process. Here are five steps to help you:

- Step 1 – Individual Preparation
  Using a worksheet with at least the following three questions, ask individuals to list any words, phrases, or ideas that come to mind with respect to the team/organization and these questions.

  - Statement of Purpose:
    What are the opportunities or needs that we exist to address? Who do we serve?

  - Statement of Strategy:
    What are we doing to address these needs? What is our unique contribution?

  - Statement of Value:
    What principles or beliefs guide our work?

- Step 2 – Flip Chart Capture
  For each question on the worksheet, use at least one sheet of flip chart paper and have team members call out ideas that relate to that question from their individual preparation. Do not edit at this point. Suggestions should be noted and recorded until the energy level in the room begins to drop or as time permits.

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*Forming Stage – Team Building Exercise*

- Step 3 – Identify Themes
  Post large sheets of captured items around the room, and give everyone the opportunity to look at each sheet. As a team, identify patterns and themes that emerge, looking for common words and repetition. Discuss how these themes might fit together to form a mission statement.

- Step 4 – Sub-team Drafts
  Create sub-teams of 3-4 members to each write a first draft mission statement for the team, based on the patterns and themes that emerged.

- Step 5 – Large Group Draft
  Bring the entire team together to share the sub-team mission statements, and then build from those a single mission statement for the entire team.

  If time allows, the team may continue the discussion to arrive at a final, polished version of the statement. Equally effective, a sub-team may be assigned to make revisions and bring the statement back at a later time for final approval by the entire team.

**Mission Statement Examples:**

Apple is committed to bringing the best personal computing experience to students, educators, creative professionals and consumers around the world through its innovative hardware, software and Internet offerings. – *Apple*

To enable and inspire customers to enjoy the daily pleasure of Peet's coffees and teas by providing distinctive, superior products, superior coffee and tea knowledge, and superior service to every customer, every day. – *Peet's Coffee and Tea*

The mission of The Nature Conservancy is to preserve the plants, animals and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive. - *The Nature Conservancy*

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## Setting Team Ground Rules

As a supervisor, you are concerned not only on getting the work done, but on *how* the work gets done. Ground rules are an important tool for helping individuals function together as a team. They reflect what is important to the members about how they work together. Ideally, the rules are set at the first meeting, allowing them to become second nature to the team. Discussing ground rules after problems arise is much more difficult. Ground rules should focus on three elements:

- Tasks – Expected activities and deliverables for the team.
- Process – How the activities will be carried out.
- Norms – Ways in which team members will interact with each other.

**Steps in Setting Ground Rules**

1. Set aside time at a team meeting to discuss ground rules. All team members should have a chance to provide input.
2. Ask team members to discuss prior group experiences. What worked well? What created problems?
3. As a group, describe what you'd like to happen when you work together.
4. Write down the ground rules to which the team has agreed. Each member should have a copy.
5. Ground rules should be reviewed periodically.

**Questions to Ask**

Ground rules for tasks:

- What are the expectations and deliverables for the team? (Review team charter if applicable)
- What does each member bring to the table?
- How will tasks be assigned?

Ground rules for processes:

- What are the standards for meeting attendance, promptness, and participation?
- What roles need to be filled (time keeper, note taker, facilitator) and how will they be assigned?
- How will the team gather data and feedback from team members and other stakeholders?
- How will team members share information?
- How will performance be monitored?

Ground rules for norms:
- How will decisions be made?
- How will problems be solved?
- How will the team handle conflicts?
- How does the team define respectful behavior?
- How will team members be held accountable?
- How will team members communicate with each other (voice mail, e-mail, etc.)?

**Sample 1: Ground Rules**
- Everyone will participate and take ownership of group projects.
- When appropriate, sub-groups will be assigned to work on specific activities.
- Team members will complete assignments on time.
- Meetings will start and end on time – no backtracking if someone is late.
- Each meeting will have a note taker (rotating task) who will distribute notes and record decisions and assignments.
- Anyone who is absent from a meeting is responsible for finding out what they missed.
- Respect the value of each individual's contribution.
- Present feedback in a *constructive* manner only
- Resolution of differences will typically be by majority decision, but on key issues the group will reach consensus.

**Sample 2: Ground Rules**
- Members will be at all meetings (except for illness and emergencies). If you can't attend, notify the facilitator in advance.
- Agendas will be distributed before each meeting.
- Meetings will start and end on time.
- The group will listen respectfully to the opinions of all team members by:
  - Using active listening.
  - Not using "killer phrases" or negative body language.
  - Brainstorming without editing.
  - Avoid side conversations.

Talk from *your own* beliefs and experiences—avoid blanket statements such as, "Everyone feels that…" instead try "I feel that…"

Information from the meetings is public and should be shared with other stakeholders, but confidentiality will be respected when requested.

The team owns all ideas and concepts – do not talk disrespectfully about team activities in public.

---

*"Setting Team Ground Rules." University of Minnesota. Office of Human Resources, 28 Apr. 2008. Web. 9 Aug. 2011.*
*http://www1.umn.edu/ohr/toolkit/workgroup/forming/rules/index.html*

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# Project Charter

## Instructions

### PROJECT CHARTER

The Project Charter is a written agreement between the sponsor and the project team describing:

- The business objectives of the project,
- The resources the sponsor promises to provide for the project,
- What the project team will deliver to the sponsor by the end of the project,
- The project team members and key project stakeholders,
- The project roles and responsibilities, and
- The high-level project risks.

### DEVELOPING A PROJECT CHARTER AT UC BERKELEY

In some organizations, the sponsor writes the charter. At UC Berkeley, the project manager typically writes the charter after interviewing the project sponsor and other key stakeholders.

The project formally begins when the sponsor signs off on the charter, approving the charter content and committing specific resources (e.g., funding, staff, equipment) to the project.

The process of interviewing and creating a charter helps the project manager and project team gather the most important initial project information as well as help establish scope boundaries.

The project charter, once approved, should provide a clear and concise summary of the project for the benefit of the sponsor, project manager, project team members, and other stakeholders. Stakeholders that join the project after the project has started also benefit from first reading the project charter.

During the execution of the project, changes to the scope are documented and a new revision of the Charter is approved. A change management form helps with the change conversation, and is attached to the charter as an addendum.

The Project Charter template contains notes to help with understanding what is requested for each section. Additional hints and suggestions for completing the charter sections are described in this guide.

### PROJECT SCOPE CHANGES

Any tasks, requests, or additions to this project not indicated in the scope statement are considered "out-of-scope" for the current project. When a Project Scope change is required, change requests are clearly defined (including an impact analysis of cost, resource, and schedule implications), justified, and formally approved by the Project Sponsor(s). It is expected that stakeholders who initiate a change request will work collaboratively with the Project Manager to document and communicate the proposed change to key stakeholders. Proposed changes will then be brought to the attention of the Project Sponsors who will review and decide on how to proceed with the request.

Ultimately, changes to scope require the approval of the Project Sponsors.

*https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools*

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**FILLING OUT THE CHARTER**

**PROJECT NAME**
Enter the proper name used to identify this project.

**PREPARED BY**
Enter the name of the person writing the charter; typically the project manager.

**DATE**
Enter the date the charter was last modified.

**PROJECT CHARTER VERSION HISTORY TABLE**
Enter the version, date and comments of each version throughout the development of the Charter.

**REVIEW & APPROVAL**
Have the project team members and key stakeholders (including the sponsor and customer) review the draft of the charter for completeness and accuracy.

**CASE FOR CHANGE**
Describe the current situation that necessitates a project.

**PURPOSE**
Describe what problem will be solved by the project?  Describe what value this project adds to the organization.  Describe how this project aligns with the strategic priorities of the organization.  Describe what benefits are to be expected once the project is completed.

**RESULTS**
Describe what success looks like.  Describe how the Sponsor will know that the project is complete including success metrics.  For example – "overall cost savings of $50K," or "reduce processing time by 25 percent."   To measure the targets, there must be a baseline set at the beginning of the project.  In the first example, the total costs must be known at the beginning of the project so that a comparison can be made and the total savings can be calculated.  The same is true for the second example where the total processing time at the beginning of the project must be identified so that a comparison can be made at the conclusion of the project and the difference measured.  Another option is to give an absolute value, e.g. "reduce end-to-end processing time to 2 weeks."

**SCOPE**
The scope defines the boundaries in terms of where the project begins and ends.  The scope describes what will be delivered; where, when, and how.  It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery.

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## Project Charter Template

| PROJECT NAME: | Project Name |
|---|---|
| PREPARED BY: | Typically the Project Manager |
| DATE (MM/DD/YYYY): | Project Charter Last Modified Date |

| PROJECT CHARTER VERSION HISTORY | | |
|---|---|---|
| VERSION | DATE (MM/DD/YYYY) | COMMENTS (DRAFT, SIGNED, REVISED – CURRENT STATUS) |
| | | |
| | | |

### DOCUMENT PURPOSE

The Project Charter documents the formal conversation between the Project Sponsor and the Project Manager/Team, including the definition of success for the project.

Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project including the definition of project success, and project resource (people and funds) requirements.

Requests and additions to the project scope are considered "out-of-scope" for the current project. When a scope change is required, document a change request that includes an impact analysis of project cost, resources, schedule, and risk. The Project Sponsor then formally approves the scope change request.

The project manager will retain additional documents that provide detail on the management of the project, including a communications plan, an issues log, a risk log, a change management plan, a budget, and a work schedule.

| REVIEW & APPROVAL | | |
|---|---|---|
| *(The Project Sponsor signature indicates approval of the Project Charter, and authorizes the Project Manager/Team to use identified resources to proceed with the detailed planning and execution of the project; using this charter as guide.)* | | |
| PROJECT SPONSOR(S) NAME | SIGNATURE | DATE |
| | | |
| | | |

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**CASE FOR CHANGE**
*(What is the Current Situation?)*

**PURPOSE**
*(What problem will be solved by the project? What value does this project add to the organization? How does this project align with the strategic priorities of the organization? What benefits are expected once the project is completed?)*

**RESULTS**
*(What does success look like? How do we know that the problem described above is resolved? This typically involves clarifying metrics for operations once the project is completed.)*

| # | SUCCESS MEASURE |
|---|---|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| | |

**SCOPE**
*(The scope defines the boundaries in terms of where the project begins and ends. The scope describes what will be delivered - where, when, and how. It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery.)*

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| PROJECT CONSTRAINTS & ASSUMPTIONS | |
|---|---|
| *(List the known and anticipated constraints, and the initial assumptions for the project.)* | |
| # | NAME |
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |

| PROJECT MILESTONES & DELIVERABLES | | |
|---|---|---|
| *(List the major milestones and deliverables of the project.)* | | |
| MILESTONE | DELIVERABLES | DATE |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

| IMPACT STATEMENT | | |
|---|---|---|
| *(List the impact this project may have on existing systems and populations.)* | | |
| POTENTIAL IMPACT | WHAT AND WHO IS IMPACTED | RATING (1-5) 1:Low 3: Med 5: High |
| | | |
| | | |
| | | |
| | | |

| FINANCE DESCRIPTION |
|---|
| *(Provide a high level narrative overview on the estimated investment requirements, the savings targets, and the ongoing funding model.)* |
| |

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| **RISKS** *(Identify the high-level project risks and the strategies to mitigate them.)* | |
|---|---|
| RISK | MITIGATION STRATEGY |
| | |
| | |
| | |

| **COMMUNICATION** *(Highlight the communication requirements between the Sponsor, the Key Stakeholders and the Project Team, including the frequency of check-ins, project reviews, and status reports (in person and written).)* |
|---|
| |

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## APPENDIX A - PROJECT ROLES & RESPONSIBILITIES

| | |
|---|---|
| **PROJECT SPONSOR:** Provides overall direction, guidance, and funding for the project.<br><br>**RESPONSIBILITIES** include setting the vision and strategic direction, approving the project charter and plan; securing resources for the project; confirming the project's goals and objectives; keeping abreast of major project activities; making decisions on escalated issues; and assisting in the resolution of roadblocks. | |
| **NAME** | |
| **NAME** | |

| | |
|---|---|
| **FUNCTIONAL OWNER:** Manages the impact of the project in their functional area.<br><br>**RESPONSIBILITIES** include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met. | |
| **NAME** | |
| **NAME** | |
| **NAME** | |

| | |
|---|---|
| **PROJECT MANAGER:** Leads the team in planning and implementing the project from initiation to closure.<br><br>**RESPONSIBILITIES** include scope and change management, keeping the project plan current (deliverables, schedule, and resources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams. | |
| **NAME** | |
| **NAME** | |

| | |
|---|---|
| The **PROJECT STEERING COMMITTEE** includes key stakeholders and subject matter experts.<br><br>**RESPONSIBILITIES** include providing guidance on key issues. | |
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |

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| A **SUBJECT MATTER EXPERT (SME)** provides expertise on project elements including business process and current or new technical solutions. **RESPONSIBILITIES** include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task. | |
|---|---|
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |
| **NAME** | |

*Describe the roles and responsibilities of the project participants.*

| **PROJECT TEAM MEMBERS** **RESPONSIBILITIES** include <ul><li>understanding the work to be completed, completing the research, data gathering, analysis, and documentation,</li><li>informing the project manager and team members of issues, scope changes, risks, and quality concerns, and</li><li>proactively communicate status and manage expectations.</li></ul> | | | |
|---|---|---|---|
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |

## APPENDIX B - KEY TERMS & DEFINITIONS FOR THIS PROJECT CHARTER

*Define key terms unique to this Project Charter.*

|  |
|---|
|  |

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## Hidden Treasure

**Objective:**
The purpose of this activity is to allow team members, who have not previously worked together, to become acquainted with one another.

**Materials:**
- A copy of the Treasure Hunt Worksheet for each person (see next page)
- Pens or pencils

**Instructions:**
- At the beginning of the meeting, explain the importance of teamwork and camaraderie, as well as the importance of being acquainted with their new team.
- Hand out a copy of Treasure Hunt to each person.
- Ask everyone to circulate around the room, finding one trait you have in common (e.g. "grew up in Phoenix"), and one dissimilar trait (e.g. "sports fan" vs. "dislike sports") for each person on the team, or as time permits.

**Debrief Questions to Ask:**
- How many of us tend to be reticent on first meeting friends of team members?
- How was this exercise for you? Threatening or non-threatening?
- What unexpected things did you find in common?

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## Hidden Treasure Worksheet

|  | Name | Alike | Different |
|---|---|---|---|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |

Newstrom, John W., and Edward E. Scannell. *The Big Book of Business Games: Icebreakers, Creativity Exercises, and Meeting Energizers*. New York: McGraw-Hill, 1996. Print. (page 31)

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## Group Resume

**Objective:**

Creating a group resume is a fun way to help team members become acquainted, or to do some team building with a team whose members already know one another. This activity can be especially effective if the resume is geared to the subject matter of the meeting or team project.

**Materials:**

- Post specified resume information (listed below) on flip chart
- Flip chart paper
- Markers

**Instructions:**

1. Tell team members that they represent an incredible array of talents and experiences!
2. Explain that one way to identify the team's resources is to compose a team resume.
3. Divide team into sub-teams of 3 to 6 members.
4. Provide each sub-team with flipchart paper and markers to use in creating their resume. Sub-team resumes should include any information that promotes the sub-team as a whole. Include the following information:
   - educational background
   - knowledge about the team project
   - total years of professional experience
   - positions held
   - professional skills
   - major accomplishments
   - publications
   - professional organizations
   - hobbies, talents, travel, family
   - other
5. Invite each sub-team to present its resume to the entire team.
6. Once all sub-teams have presented, acknowledge the total resources contained within the entire team.

**Variations:** Instead of having participants compile a resume, ask them to interview one another about categories that you provide.

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**Debrief Questions to Ask:**

- How can we leverage these resources, skills, and experience back on the job?
- Are there any noticeable skill gaps in the team? If so, how can we either develop this skill within the team or draw on an outside source?

**Tips for Success:**

- You may want to suggest a job, contract, or project the team could be bidding for.

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## A Penny for Your Thoughts

**Objective:**

The purpose of this activity is to allow team members, who have not previously worked together, to become acquainted with one another.

**Materials:**
- Pennies

**Version 1 - Instructions:**
1. Give one penny to each participant (be sure the year of the penny is within 15 years of the current year).
2. Go around the group, having each person share something significant or interesting that happened to them in the year that appears on the penny they were given.

**Version 2 - Instructions:**
1. Have enough pennies for each participant to have five pennies.
2. Instruct each person to share something unique about themselves, or something they have done which is unlikely that anyone else has in common with them.
3. After they share the item, if no one else shares this in common, they may place one of their pennies in the center of the table.
4. If anyone else does have this item in common with them, this person(s) may also place one of their pennies in the center of the table.
5. Rotate to the next person and continue.
6. The first person who disposes of all their pennies wins!

**Debrief Questions to Ask:**
- Why is it important for us to know more about each other?
- How difficult (or easy) was it to share information about yourself with others?
- How can we learn more about one another back on the job?

**Tips for Success:**
- Give participants a few minutes to think of something to share before beginning.
- For Version 1, if someone can't think of anything significant from that year, encourage them to describe what was going on in their life at that time (where were they living, what job did they have, what hobbies were they pursuing, etc.)
- If you have time, let the group ask questions after each participant shares their information.

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## Sweet Stories

**Objective:**

The purpose of this activity is to allow team members, who have not previously worked together, to become acquainted with one another.

**Materials:**

- A large bag of M&Ms®, Skittles®, or other colored candy pieces

**Version 1 - Instructions:**

1. Have each participant take one candy.
2. Instruct them not to eat it yet.
3. Take turns sharing with the group a story based on the following color code:
   - Blue candy = a time at work when you felt very proud
   - Green candy = a prior boss you respected and why
   - Yellow candy = a reason you are proud to belong to this organization/department
   - Brown candy = an embarrassing moment at work
   - Orange candy = a time at work when you failed, and what you learned from the experience
   - Red candy = a funny thing that happened to you at work
   - Purple = a time at work when you were scared
4. Eat the candy.

**Version 2 - Instructions:**

1. Provide each participant with the same color of candy, based on the color code above.
2. Instruct them not to eat it yet.
3. Take turns sharing with the group a story based on the selected color.
4. Eat the candy.

**Large Group Variation:**

- Divide larger groups (more than 12) into smaller teams of three to five members to share their stories with each other. Give them time to share their stories from one or more colors. Have them select the best story from the team and share with the larger group.

**Debrief Questions to Ask:**

- Why is it important for us to know more about each other?
- How difficult (or easy) was it to share information about yourself with others?
- How can we learn more about one another back on the job?

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**Tips for Success:**

- Give participants a few minutes to think of something to share before beginning.
- Other topics can be used that relate more closely to the work, organization, or special project.
- The stories do NOT have to be "the most…" (e.g. the most embarrassing). This may take pressure off individuals.
- Specify the time limit for each story, so no one monopolizes the time.
- Post the story color code, so participants can easily match their candy to the story they need to tell.
- Adapt the story themes to your team. For example, you may choose to remove the words "at work" for each color as a way to get know each other better personally.

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## Leader Actions for Dysfunctional Team Member Behaviors

Dysfunctional team member behaviors can impact the work flow of the team if not appropriately challenged.

| Behavior | Descriptions | Leader Actions |
| --- | --- | --- |
| 1. **Backbiting** | Members of team complaining and finding fault behind one another's backs; talking with non-team members instead of team members about team issues | Be aware of team dynamics; establish ground rules around direct communication; conduct a general group discussion about the issue without blame |
| 2. **Blaming** | Not taking personal responsibility; pointing the finger at others/situations | Address the problem as a group problem and an opportunity to learn; conduct a debrief session outlining **all** contributing factors and ways to do things differently next time |
| 3. **Bullying** | Attacking and intimidating behavior<br><br>Under the *Workplace Bullying Prevention* policy, bullying is defined as a pattern of repeated behavior that a reasonable person would find hostile, offensive, and unrelated to the University's legitimate business interests | Under the *Workplace Bullying Prevention* policy, supervisors who observe bullying behavior or receive a report of bullying are required to address such behavior immediately and notify their HR Partner/Representative<br><br>Note: a single physical, verbal, written act or behavior generally will not constitute bullying unless especially severe and egregious.<br>In these cases, begin with an off-line conversation with the person; monitor and document behavior; if behavior continues, notify your HR Partner/Representative |

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| Behavior | Descriptions | Leader Actions |
|---|---|---|
| 4. Discounting | Interrupting others; ignoring comments or suggestions; putting down team member contributions as irrelevant | Revisit ground rules on active listening; establish a way to capture comments and suggestions that have not received air time; ask group what they want to do with the items |
| 5. Distracting | Digressing, getting on tangents, conducting side conversations | Refer back to prepared agenda; active facilitation; revisit ground rules; parking lot tangent items for future agenda |
| 6. Dominating | Pushing own (not group) agenda; excessive talking, interrupting others, criticizing, speaking for others; arguing too much on a point and rejecting expressed ideas without consideration | Paraphrase using some of the speakers own words to indicate understanding<br><br>Use direct questions to draw out other members and gather other opinions<br><br>Use consensus and ensure everyone is actively involved<br><br>Offline conversation with person |

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| Behavior | Descriptions | Leader Actions |
|---|---|---|
| 7.  **Excluding** | Forming cliques or factions which result in members of the team distrusting and suspecting one another | In an effort to integrate the team, assign quick win projects to cross pollinate team members<br><br>Plan team building activity |
| 8.  **Feuding** | Bringing baggage or issues from other situations and creating an uncomfortable environment; members of team openly complain about and find fault with one another | Conduct offline conversation with the person(s) involved in the disruption<br><br>Monitor situation<br><br>If problem escalates seek outside intervention (e.g. Employee Assistance, Ombuds |
| 9.  **Joking** | Excessive playing around, telling jokes, mimicking other members | Return to agenda and timeline<br><br>If behavior continues conduct a general group discussion about the issue without blame |
| 10. **Labeling** | Using labels that have an emotional charge or negative connotation to attack self-esteem rather than addressing the problem | Check for understanding and ask for clarification<br><br>If behavior is chronic, conduct offline conversation with person |

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| Behavior | Descriptions | Leader Actions |
|---|---|---|
| **11. Nay-saying** | More attention paid to what is wrong than what is right in the name of playing devil's advocate; fault finding without providing alternatives; using "yes-but" language as a default | Immediately use a countering statement to refocus team on solutions |
| **12. Non-participating** | Acting with indifference; not contributing to discussions and activities; holding back opinions and ideas; not taking initiative; arriving late or leaving early | General group discussion about the issue without blame<br><br>Increase accountability by initiating project plans, agendas, minutes and action items, timelines, milestones<br><br>Vary ways of engaging participants, see Ways to Engage Participants in Creative Thinking & Dialogue, pages 59-61 |

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*Storming Stage – Team Building Exercise*

# Graffiti Feedback Board

**Objective:**

This activity provides an anonymous outlet for ongoing team member reactions. It is an informal method by which the team leader can gather ongoing team member feedback about team processes and tasks. This activity is an outlet provided for emotional and intellectual catharsis.

**Materials:**
- Flip charts
- Post-it Notes
- Black Sharpie pens

**Instructions:**
1. Ask team members to individually express (ventilate) a variety of observations, reactions, ideas, or emotions by writing each of their comments on separate post-its.
2. Once they have written on their Post-it Notes, they can then place them on the flip charts provided.
3. Topics may be provided at the top of each flip chart for structured feedback, or the feedback may be solicited on a totally unstructured basis.

**Debrief Questions to Ask:**
- How many of you agree with the comments made about _____?
- What is the basis for the various comments?
- What corrective steps can we take now to change the situation?

**Tips for Success:**
- To ensure anonymity, have participants come up at one time to adhere there Post-it Notes to the flip chart.

Adapted from Newstrom, John W., and Edward E. Scannell. *Games Trainers Play: Experiential Learning Exercises*. New York: McGraw-Hill, 1980. Print. (page 13)

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## That Guy & This Guy

**Objective:**
To bring the team together in a fun activity that identifies the qualities of a team player, and highlights the individual responsibility each member has to the team. The results of this activity can serve as an ongoing guide for team behavior and feedback.
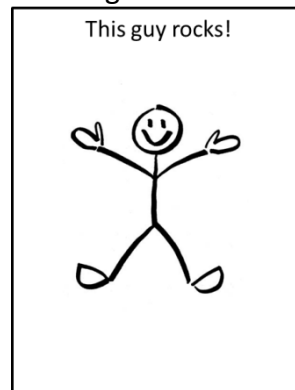
**Materials:**
- "That Guy" – Profile of a Non-Team Player (one per sub-team, provided below)
- "This Guy"- Profile of the Ultimate Team Player (one per sub-team, provided below)
- Post-it notes
- Black Sharpie pens
- Two prepared flip chart papers (one with drawing A, one with drawing B)
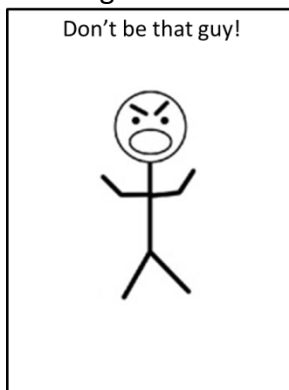
Drawing A        Drawing B



**Instructions – Part 1:**
1. Split the team into smaller sub-teams of four to six people. Pass out the Non-Team Player profile worksheet to each team.
2. Say the following:
   *"From time to time, we are all "difficult" team member. Perhaps we are stressed, tired, or preoccupied, and we are not contributing according to our normal standard. Imagine a team member with every negative characteristic. What would that look like? What qualities and characteristics would this person consistently exhibit?"*
3. Give sub-teams 10 minutes to consider that question, brainstorm, and complete the worksheet.
4. Once completed, give sub-teams 5 minutes to select their top 10 items from the worksheet, and write each item on individual post-it notes.
5. Display Flip Chart A.
6. Have each sub-team share their post-it note items with the entire team group and then place them onto Flip Chart A.

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7. Once all sub-teams have shared and posted their items, have team members come around Flipchart A and begin to organize the post-it notes into themes and combine any duplicate answers.
8. Read aloud the final post-it notes and themes to the team, and confirm agreement.

**Instructions – Part 2:**

1. Split the team into smaller sub-teams of four to six people. You can choose to have participants work with the same sub-team or with new people. Pass out the Ultimate Team Player profile worksheet to each team.
2. Say the following:
   *"From time to time, we are all "excellent" team member. We are calm, energized, or engaged, and we are contributing according to our highest standard. Imagine a team member with every positive characteristic. What would that look like? What qualities and characteristics would this person consistently exhibit?"*
3. Give sub-teams 10 minutes to consider the question, brainstorm, and complete the worksheet.
4. Once completed, give sub-teams 5 minutes to select their top 10 items from the worksheet, and write each item on individual post-it notes.
5. Display Flip Chart B.
6. Have each sub-team share their post-it note items with the entire team and then place them onto Flip Chart B.
7. Once all sub-teams have shared and posted their items, have team members come around Flip Chart B and begin to organize the post-it notes into themes and combine any duplicate answers.
8. Read aloud the final post-it notes and themes to the team, and confirm agreement.

**Debrief Questions to Ask:**

- How have we experienced or displayed some of these more "difficult" qualities in our team?
- How can we become more effective team members?
- What is our individual responsibility to the team?

**Tips for Success:**

- Prepare Flip Chart A and Flip Chart B before the session.
- Copy "That Guy" – Profile of a Non-Team Player and "This Guy"- Profile of the Ultimate Team Player handouts for each sub-team.
- Be sure to have enough Post-it Notes so all participants have a large supply for brainstorming.
- The use of Sharpie pens is important so that what is written on the Post-it Notes can be seen at a distance.
- After the exercise, post both Flip Chart A and Flip Chart B in a common space for all team members to refer back to.

Adapted from Scannell, Mary, and Edward E. Scannell. *The Big Book of Team Motivating Games: Spirit-building, Problem-Solving, and Communication Games for Every Group*. New York: McGraw-Hill, 2010. Print. (page 191)

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*Storming Stage – Team Building Exercise*

## "That Guy" - Profile of a Non-Team Player

*While answering these questions, think of the non-team-player's interactions with other team members:*

1. What would the non-team player say or not say?



2. What would the non-team player do or not do?



3. What would the non-team player think or not think?



4. What are counterproductive traits, characteristics, and qualities?



Adapted from Scannell, Mary, and Edward E. Scannell. *The Big Book of Team Motivating Games: Spirit-building, Problem-solving, and Communication Games for Every Group*. New York: McGraw-Hill, 2010. Print. (page 191)

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## "This Guy" - Profile of the Ultimate Team Player

*While answering these questions, think of the ultimate team player's interactions with other team members:*

1. What would the ultimate team player say or not say?

2. What would the ultimate team player do or not do?

3. What would ultimate team player think or not think?

4. What are productive traits, characteristics, and qualities?

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## Blame Game

**Objective:**

To bring the team together in a fun activity that demonstrates the influence that each member has in affecting team behavior.

**Materials:**

- No materials are necessary for this activity.

**Instructions – Round 1:**

1. Arrange the group in a large circle, with everyone standing.
2. Find your "Role Model:"
   a) As the team leader, you begin by pointing to someone in the circle. Keep pointing.
   b) That person now points to someone else and keeps pointing.
   c) Continue until everyone is pointing to someone else, and the last person then points to you.
   d) Stop pointing (drop your hands) and fix your eyes on the person you were pointing to. This person is your "Role Model."
3. Explain that the objective is to watch your "Role Model" closely and to copy his/ her every action.
4. Now ask the team to stand perfectly still. No one may move unless his/her "Role Model" does. If his/her "Role Model" moves (twitches, coughs, blinks, etc.), he/she is to mimic that movement exactly and then be still again.
5. Begin the game and play several times.

**Debrief Questions to Ask – After Round 1:**

- We were supposed to stand still – what happened? (Expect some participants to immediately start blaming their Role Model for moving.)
- Who knows who started the movement? (Allow for some accusations; inevitably it will be difficult or impossible to pinpoint who really started each movement.)
- How much does it matter who started it, once it got started?
- How much energy do we expend looking for scapegoats?
- How are we responsible for perpetuating certain behaviors that eventually become team norms? What examples of this do we have here at work?
- What implications does this have for us back on the job?

**Instructions – Round 2:**

1. Play the game as before only this time designate one person as "Where the Buck Stops." When the movement starts and moves around the group, that participant will NOT repeat it.

*Storming Stage – Team Building Exercise*

**Debrief Questions to Ask – After Round 2:**

- How much influence can one person have in affecting team behavior?
- What implications does this have for us back on the job?

**Tips for Success:**

- Small movements are bound to happen. When they do, the movement will be duplicated around the group endlessly. Usually it will be exaggerated.
- If the movement gets out of hand, just stop the game and refocus everyone, and start again.

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# Labels

**Objective:**

To bring the team together in a fun activity that demonstrates the impact labeling and team behavior has on both people and the work.

**Materials:**

- A set of six labels for each group. Labels should be large enough that participants can read them from several feet away, but small enough to fit on a person's forehead.
- Pre-write on each label either a directive (e.g. disagree with me, ignore me, treat me like the leader, laugh at me, respect my opinions, find fault with me, agree with me, interrupt me, argue with me, etc.) or a descriptor (e.g. arrogant, helpful, self-promoting, brown-noser, cooperative, a pushover, defensive, leader, etc.).

**Instructions:**

1. Divide the team into sub-teams of six.
2. Distribute a set of six labels to each sub-team, face down.
3. Each participant sticks a label on the forehead of the person next to him/her.
4. All participants can read what is on others' labels but not what is on their own. Do not tell anyone what is on his/her own label.
5. Give the sub-teams a task to plan (e.g. plan a departmental picnic, how they will participate in this year's community fund raiser, etc.). They will have 7 minutes to do this.
6. As they discuss, they must engage with and react to each person on their team according to the label the person is wearing.
7. After 7 minutes, even if the task is not complete, stop the teams and discuss.

**Questions to Ask:**

- What happened? Did you accomplish your task? Why or why not?
- How satisfied are you with the outcome? Why?
- How did you feel about treating people according to their assigned label? Did it get easier over time? If yes, why do you think that was?
- How did you feel about the way you were being treated? What was your reaction?
- What implications does this have for us back on the job?

**Variations:**

- Make the labels represent different stakeholders on a project, different customers, etc.
- Have only one group of six to eight participate with labels, while the rest of the group observes.
- Instead of "planning a picnic," have the teams grapple with a real work-related problem or issue.

*Storming Stage – Team Building Exercise*

**Tips for Success:**

- Use your judgment in dividing teams. For example, if you have 11 participants, remove one label from one set, and have one team of 6 and one team of 5 participants, so that everyone can have the experience. If there are 13 participants, have a 7th label ready or use one of six directives or descriptors twice.
- Some people may be reluctant to adhere to the labels. Throughout the exercise, encourage participants to take the assigned labels to heart and act accordingly.

Adapted from Miller, Brian Cole. *Quick Team-building Activities for Busy Managers: 50 Exercises That Get Results in Just 15 Minutes*. New York: AMACOM, 2004. Print (page 155)

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## Ways to Engage Participants - Creative Thinking & Dialogue

**Outcome:**

To stimulate creative thinking and dialogue using a variety of idea generating approaches, including some that encourage breadth and others that support depth.

### OPEN DISCUSSION
**—invites ideas and opinions from everyone—**

| What is it? | Best used when… | Consider not using when… | Considerations for the leader |
|---|---|---|---|
| Group members participate in an unstructured conversation that invites everyone in the room to contribute ideas/opinions. | The exploration of ideas using a familiar conversational approach is desired. | A decision is needed and time is limited.<br><br>A few individuals dominate discussions. | Focus the discussion.<br><br>Determine who talks when. |

### INDIVIDUAL WRITING
**—allows individuals to organize their thoughts before group discussion—**

| What is it? | Best used when… | Consider not using when… | Considerations for the leader |
|---|---|---|---|
| Group members organize their thoughts by individually writing for a few minutes prior to engaging in an Open Discussion, Round-the-Table, Brainstorming, or 2*4*8. | Individual reactions and depth are desired.<br><br>Individuals have strongly held opinions and move quickly out of inquiry into advocacy.<br><br>There are several introverts/internal processors in group.<br><br>There are significant power differences between participants.<br><br>The leader would like to know what each group member thinks. | The issue being discussed is straightforward or has a limited impact on the group. | Clarify the topic or question.<br><br>Indicate that the purpose is for members to clarify their thinking.*<br><br>Let people know how much writing time is allotted.<br><br>*Consider using post-its if ideas will be categorized.* |

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*Norming Stage – Team Building Tool*

**ROUND-THE-TABLE**
**—ensures that everyone contributes an idea or opinion—**

| What is it? | Best used when… | Consider not using when… | Considerations for the leader |
|---|---|---|---|
| Group members speak one at a time in an identified order without interruption. | Identifying thoughts and opinions about a complex topic will help structure the discussion and/ or demonstrate the wide range of ideas in the room.<br><br>Hearing from each person is desired: in a newly formed group, with a heated topic, or to include quiet members.<br><br>The leader would like to know what each group member thinks. | The issue being discussed is straightforward or has a limited impact on the group. | Decide whether or not to record each person's thoughts.<br><br>Clarify the question to be addressed.<br><br>Indicate how much time to take: 3 sentences, as long as you like, etc.<br><br>Ask for a volunteer to start and suggest that the group continue clockwise. |

**BRAINSTORMING (IDEA LISTING)**
**—quickly generates a wide variety of ideas—**

| What is it? | Best used when… | Consider not using when… | Considerations for the leader |
|---|---|---|---|
| Group members quickly generate a variety of ideas and stimulate each other's thinking.<br><br>*Mind Map Variation*<br><br>By visually connecting ideas as they emerge, you can create a mind map that displays both ideas and the relationships between them. | Energizing the group and stimulating creative thinking is desired.<br><br>Generating a wide variety of ideas is desired. | The issue being discussed is straightforward or has a limited impact on the group.<br><br>A decision is needed and time is limited. | Create ground rules:<br><br>• Clarify all ideas are welcome.<br>• Explain that discussion, analysis, and prioritization will come later.<br>• Ensure vocal participants to do not silence quieter group members.<br><br>Clarify the question to be addressed and indicate how long the brainstorm will last.<br><br>Decide how to record the ideas. |

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*Norming Stage – Team Building Tool*

**2\*4\*8 (IDEA GENERATING and CLUSTERING)**
**—quickly generates individual ideas that small groups synthesize into themes—**

| What is it? | Best used when… | Consider not using when… | Considerations for the leader |
|---|---|---|---|
| <u>Generate ideas—post-its</u><br><br>Group members individually write for a few minutes in response to a question (e.g., what contributes to successful meetings?). One idea per post-it.<br><br><u>Synthesize/Cluster Ideas</u><br><br>1. Ask people to form pairs and share their post-its by reading them aloud to each other (alternate). Stick similar ideas together.<br><br>2. Ask pairs to find another pair. One person in the group of four describes a theme of a post-it cluster. The other pair reads aloud any cluster(s )with similar ideas. Stick similar ideas together on flip chart paper. Continue until all post-its have been read aloud even if they don't cluster. *Variation: Continue one more round in groups of eight.*<br><br>3. Write headings for each cluster on a blank post-it.<br><br><u>Museum Tour</u><br><br>When clustering is complete, groups rotate clockwise and read next group's headings/titles.<br><br>Debrief by asking the entire group what similarities they noticed, surprises, etc | Individual reactions and breadth of responses are desired ***and*** the leader/group would like to know in real time what themes exist.<br><br>Individuals have strongly held opinions and move quickly out of inquiry into advocacy.<br><br>Energizing the group and encouraging dialogue among individuals. | The issue being discussed is straightforward or has a limited impact on the group.<br><br>A decision is needed and time is limited. | Clarify the topic or question.<br><br>Clarify that all ideas are welcome – one idea per post-it.<br><br>Takes more total time than the methods that only generate ideas.<br><br>It is an efficient and transparent way to use "parallel processing" to gather individual data points and quickly cluster them into themes. |

*LDP – Meetings that Work by Katherine Mitchell, Organizational Effectiveness & Metrics, UC Berkeley, 2010.*

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# Wisdom from Geese

**Objective:**

The purpose of this activity is to set the stage for supportive team behavior by reflecting on the wisdom gleaned from the behavior of geese.

**Materials:**

- Wisdom from Geese handout
- Pens for note taking
- Flip chart and markers (optional)

**Instructions:**

1. Give each participant a copy of the Wisdom from Geese handout (see next page).
2. Go around and have volunteers read aloud each fact about geese.
3. After all facts have been read, ask the team the following question:
   *What wisdom did you learn from the geese that we can apply to our team?*
4. During the discussion, encourage note taking on the handout provided.

**Tips for Success:**

- Encourage participants to openly share their learnings.
- You may choose to capture points on a flip chart.
- Below are the key lessons you want to guide the team to uncover:


Lesson 1
Those who share a common direction and sense of community get there faster and with greater ease because they travel on the momentum of others.

Lesson 2
Stay in formation with those headed in the same direction as you. Be willing to accept their help as well as give help to others.

Lesson 3
It is sensible to take turns doing demanding jobs.

Lesson 4
Be sure to encourage one another.

Lesson 5
Stand by the members of your team in difficult times as well as strong times before going out on your own.

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**Wisdom from Geese**

| Facts About Geese | Team Lessons |
|---|---|
| 1. As each bird flaps its wings, it creates uplift for the bird immediately following. By flying in a "V" formation, the whole flock adds 71% greater flying range than if each bird flew alone. | |
| 2. When a goose falls out of formation, it suddenly feels the drag and resistance of trying to go it alone. It quickly gets back into formation to take advantage of the lifting power of the bird flying in front. | |
| 3. When the head goose gets tired, it rotates back in the wing and another goose flies point. | |
| 4. Geese honk from behind at those up front for encouragement. | |
| 5. When a goose gets sick or wounded, two other geese follow it out of formation to lend help and protection. They stay with the fallen goose until it is able to fly or until it dies. Only then do they launch out on their own or with another formation to catch up with their group. | |

*Developed by Suzy Thorman and Kathy Mendonca, People & Organization Development, UC Berkeley, 2011.*

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**Toss Me Some Feedback**

**Objective:**
To bring the team together in a fun activity that explores the importance of giving and receiving feedback and support from the team in order to achieve successful outcomes.

**Materials:**
- Balls, beanbags, or similar tossing items
- Blindfolds
- Stopwatch
- Masking tape
- Boxes (empty Xerox paper box or similar size)

**General Instructions:**
1. Split the team into sub-teams of four to seven people.
2. Each team needs one blindfold, one ball, one box.
3. Tape a start line for each team on the floor.
4. Place a box at least 10 feet away from each start line.
5. Each team needs a tosser, a retriever, a scorekeeper, and an assistant.
6. One point is scored for every ball the tosser gets into the box. (The ball can bounce out; as long as it bounces into the goal box first it counts as a point.)
7. Each round is one minute. The goal is for the tosser to score as many points as possible in one minute.
8. The tosser is blindfolded, and then stands behind the start line.
9. The retriever picks up the ball and throws it back to the assistant.
10. The assistant gives the ball back to the tosser.
11. The scorekeeper adds up the successful tosses for each round.

**Instructions – Round 1:**

**No talking.**

1. The tosser attempts to score as many points as possible with no input or coaching from their team.

**Instructions – Round 2:**

1. The team can coach their tosser by saying either "yeah!" or "boo!" but nothing else.
2. The tosser attempts to score as many points as possible with this limited feedback from their team.

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**Instructions – Round 3:**

1. The team can coach their tosser by providing any helpful information.
2. The tosser attempts to score as many points as possible with extensive feedback from their team.

**Debrief Questions to Ask:**

- Tossers: What was challenging for you in Round 1, receiving no feedback? How did you overcome the lack of support?
- Tossers: What was challenging for you in Round 2, receiving minimal feedback?
- Team: During Round 1, how did it feel to simply watch?
- In the workplace, do we sometimes simply watch, or do we offer to help each other and accept help from others?
- When we do offer and accept help, what makes this process effective? What would make it more effective?
- What kind of feedback is the most effective? Why?

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# Hand Shake It Up

**Objective:**

To bring the team together in a fun activity that explorers the positive team behaviors of sharing information and learning from one another.

**Materials:**

- No materials are necessary for this activity

**Instructions – Part 1:**

1. Have participants pair up.
2. Ask each pair to come up with a handshake. The handshake should have three moves and a sound-effect or phrase.
3. Give them a few minutes to develop and practice their handshake.

**Instructions – Part 2:**

1. Have each pair join another pair.
2. Have them put their handshakes together to form a six-part handshake with two sound-effects or phrases.
3. Give the new foursomes time to practice.
4. Have each foursome demonstrate their elaborate handshakes to the rest of the team.

**Instructions – Part 3:**

1. Have all foursomes join together.
2. Have them combine their handshakes and sound-effects or phrases to create a unified team handshake.

**Questions to Ask:**

- How did you learn the various handshakes without becoming overwhelmed?
- What aspect of the process was easy? Challenging?
- What did you do to support the team's process and outcomes at each stage?
- In what ways does this relate to sharing information and learning from each other at work?

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*Norming Stage – Team Building Exercise*

# Celebrations That Reverberate

**Objective:**

Teams that acknowledge their successes have more successes. Recognition and celebration can give team members that extra boost of energy or confidence to keep on going when the going gets tough. When team members feel good, their good feelings reverberate into other interactions. The following set of questions delves into the elements that create and sustain team spirit.

**Materials:**

- No materials are necessary for this activity

**Instructions:**
As the team leader, facilitate a discussion using the following questions:

1. Think about the teams you have been on and tell me about one that created celebrations that reverberated.
   - How did the team celebrate?
   - What made their celebrations reverberate?

2. Tell me about a time when you were recognized and celebrated.
   - How did you feel?
   - How did it affect the rest of your day? Your relationships with the people who honored you?

3. Imagine a team that celebrates regularly. What would it celebrate? How?

**Tips for Success:**
- Use information from the team's answers to these questions to help identify meaningful ways to recognize and acknowledge team success.

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## Six Thinking Hats®

A high performing team is able to tap into their collective wisdom and function well together. One effective tool that helps teams become more productive is Six Thinking Hats®. This tool separates thinking into 6 distinct categories. Each category is identified with its own colored metaphorical "thinking hat." You can use Six Thinking Hats® by either having the entire team wear a particular hat color or have individuals on the team adopt different hat colors to explore a topic.

Benefits:

- ❖ Hold meetings without emotions or egos influencing the decision
- ❖ Dig deeper into issues to ensure well informed decisions
- ❖ Look at issues from a variety of perspectives to build creative solutions
- ❖ Organize each person's thoughts and ideas
- ❖ Get to the right solution quickly and with a shared vision

| Color | Description |
|---|---|
| **Grey Hat** | The Grey Hat is about **information** gathering. What information do we already have or need?<br><br>Focus on available data. Look at the information you have and see what you can learn from it. Look for gaps in your knowledge, and either try to fill them or take them into account. This is where you analyze past trends and try to extrapolate from historical data. |
| **Blue Hat** | The Blue Hat signifies **intuition**, hunches, and feeling.<br><br>Think about how other people will react emotionally, and try to understand and anticipate the intuitive responses of people who do not fully know your reasoning. Look at the issue using intuition, gut reaction, and emotion. |
| **Purple Hat** | The Purple Hat is the **devil's advocate**. What are all the reasons why ideas or approaches might not work?<br><br>Look at things pessimistically, cautiously and defensively to highlight the weak points in a plan or course of action. This allows you to eliminate them, alter your approach, or prepare contingency plans. Spotting problems in advance, before you embark on a course of action, helps make your plans stronger and more resilient when difficulties arise. |

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| | |
|---|---|
| **Orange Hat** | The Orange Hat is the **proponent**. It signifies an optimistic and positive viewpoint.<br><br>What are the reasons why ideas and approaches might work?<br>Focus on the benefits of the issue, the value it will bring, and opportunities that may arise from it. This approach helps you keep going when the situation appears overwhelming or difficult. |
| **Green Hat** | The Green Hat is for "**out of the box**" thinking. What are the creative possibilities, alternatives, and new ideas we can consider?<br><br>Explore creative solutions to the issue. Apply a freewheeling way of thinking where there is little criticism of "out-of-the-box" ideas. |
| **Pink Hat** | The Pink Hat is the **facilitator** of the Six Thinking Hats® process.<br><br>This is the hat worn by a person chairing meetings who selects the thinking mode that will advance the discussion. When exploring a new issue or when ideas are running dry, they may suggest the entire team wear a particular hat color or that individuals on the team adopt different hat colors to explore a topic. |

*Adapted from* Bono, Edward De. *Six Thinking Hats*. Victoria: Penguin Australia, 2008. Print. (www.debonothinkingsystems.com)

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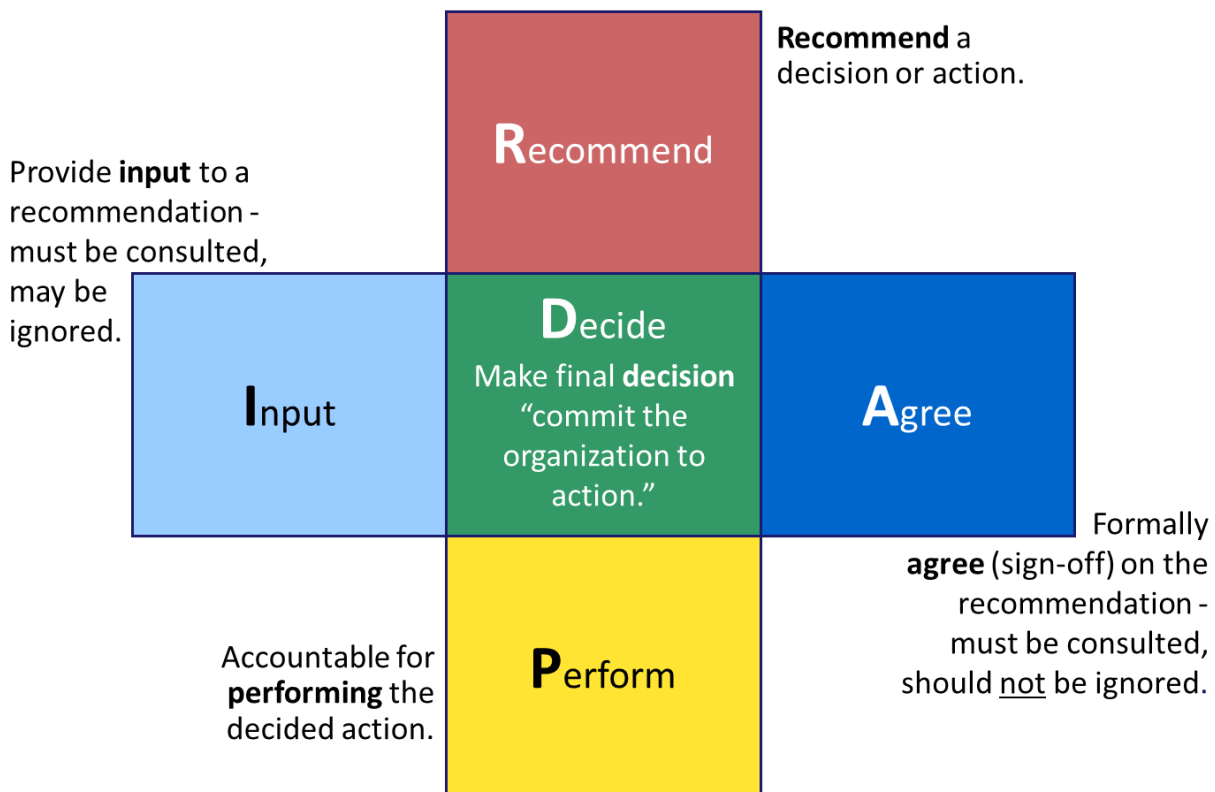HOW DO YOU WANT TO **GROW** TODAY?

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# RAPID®

## *A tool for allocating decision roles*

The RAPID Tool was introduced across campus as part of Operational Excellence, in an effort to define a decision-making structure. It illustrates the various decision-making roles an employee can be given.

When delegating a task there will be points at which recommendations, input, decisions, and approval will occur. It is important to clarify upfront with your employee what their decision-making role will be.

- **Recommend** - are they being asked to make a recommendation?
- **Input** - are they being asked to provide input, which may or may not be adopted?
- **Agree** - do they need to receive a formal sign-off from you on the recommendation?
- **Decide** - who makes the final decision before moving forward?
- **Perform** - are they responsible for performing the decided action?

**Recommend** a decision or action.

**R**ecommend

Provide **input** to a recommendation - must be consulted, may be ignored.

**I**nput

**D**ecide
Make final **decision** "commit the organization to action."

**A**gree

Formally **agree** (sign-off) on the recommendation - must be consulted, should <u>not</u> be ignored.

Accountable for **performing** the decided action.

**P**erform

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# Gradients of Agreement

*A group decision method that supports clear, sustainable decisions.*

## Why use the Gradients of Agreement?

When team members are asked whether or not they support or 'buy-in to' a particular decision, it is often unclear what each individual's "yes" or "no" actually means.  Is someone who says "yes" enthusiastically supporting the decision?  Or simply hoping that the meeting will end soon?  Are participants who say "no" trying to communicate that they can't live with the decision?  Or would minor adjustments help them become more enthusiastic supporters?

A decision continuum, such as the Gradients of Agreement, allows individuals to register specific responses to a proposal—both before and after discussions.  It also allows the leader to determine if there is *enough* support (rather than unanimous support) to move forward.

## Gradients of Agreement Continuum

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| **Start over** | **I support this proposal with major changes** | **I do not support, but will not block** | **I support this proposal with minor changes** | **I fully support this proposal** |

### Tips for Using the Gradients of Agreement during a Meeting

**Introduce the decision method *before* the discussion**
Before starting the discussion, let the team know whether they will be giving input to the decision maker or making the decision as a team.

Let the team know that after sufficient discussion a proposal will be created and everyone will use the gradients of agreement to register their level of support for the proposal.

Show them the continuum *(helpful to have an enlarged version on a whiteboard or flipchart and/or a copy for each person)*. Review the four levels of support on the continuum.

**Develop a proposal after sufficient discussion**
After determining that there has been sufficient discussion, the chair, agenda item leader, or member of the team can ask for or suggest a short proposal (one – two sentences) describing the team's intended response to the issue being discussed.  The proposal can be modified so that it reflects the team's thinking. Write the proposal for everyone to see.

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**Ask each person to indicate his/her level of agreement with the proposal**

The chair or agenda item leader should restate the proposal, then go around the table so that each individual can indicate his/her level of agreement with the proposal. *(Suggestion: If the chair or agenda item leader makes a check mark in the appropriate box to record each person's level of support, it helps the entire group see the distribution of responses and then the chair or group can determine if there is enough support for the proposal to move forward.)*

Ask anyone who indicated a "1" or "2" on the continuum what could help move them up one level of agreement on the continuum (sometimes these are easy changes to make!).

**Determine if there is sufficient support to move forward**

It is very unusual to have unanimous support where everyone indicates "4" and the gradients of agreement allows for a range of support to exist and still move forward on a proposal.

The leader decides whether or not:

—there is enough agreement to formalize the decision (a majority of "3" and "4" responses to the proposal), or

—there is not enough agreement to make a decision and the team should continue to discuss the issue.

**Time-saving tip**

When you sense general agreement before a topic is even discussed, suggest a straw poll using the Gradients of Agreement. Team members can easily go around the table and indicate their level of agreement on the continuum. If everyone is a 3, 4, or 5, the group can often move on to the next agenda item without an extended discussion.

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## Turning Pressure into Performance

**Objective:**

The following set of questions is designed to help your team think about how to turn overwhelming pressures into high performance.

**Materials:**

- No materials are necessary for this activity

**Instructions:**

As the team leader, facilitate a discussion using the following questions:

1. Think about what causes you pressure and share a time when you successfully turned that pressure into high-performance.
   - What was the situation?
   - What did you do?

2. How did you feel as you did this? What were the benefits to you and to others?

3. Imagine our team regularly turning pressure into performance.
   - What pressures are there?
   - How can we transform them into successful results?

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*Performing Stage – Team Building Exercise*

# Picture-Based Scavenger Hunt

**Objective:**

The purpose of this activity is to demonstrate the key elements of performing in an effective team by utilizing team work, communication, creative thinking, and instilling a spirit of cooperation and trust among your team.

**Materials:**

- Scavenger Hunt list created by team leader. The list can include street signs, local businesses, landmarks, or even well-known employees.
- Digital cameras/cell phone cameras (provided by participants)

**Instructions:**

1. Divide the team into sub-teams of four or more.
2. Explain the purpose of this activity is to utilize team work, communication, and creative thinking to foster a spirit of cooperation among team members. The objective is for each team to find and photograph as many items on the scavenger hunt list provided.
3. Provide each sub-team with a copy of the scavenger hunt list.
4. Ask each sub-team to appoint a photographer, a map holder, a list keeper and timekeeper.
5. Designate a time and place to meet to tally up items found by each sub-team.
6. Each found item, counts as one point. The sub-team with the most points wins!
7. Teams need to be back at the finish location on time or risk losing one point for every minute late.

**Debrief Questions to Ask:**

- Did your sub-team complete the scavenger hunt? Why or why not?
- What skills did your team use?
- How did you make decisions in your team?
- Did your team have a clear leader?  How were they chosen?
- How did members of your team communicate?

**Tips for Success:**

- Make your scavenger item list mean something to participants by choosing sites or things connected to your line of work or organization's history.
- Suggest that the photo they take of each item or location also include sub-team members in a creative way.
- To add a further challenge, you might choose to give attendees clues to locations they need to work together to decode.
- Consider a prize/reward for the sub-team who found the most items on the list or had the most creative photos.

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- Sample Scavenger Hunt items:
    - Your sub-team touching the top of _____.
    - The billboard on the corner of _____ and _____?
    - The gargoyles above the doorway to _____? How many are there?
    - The statue located at _____? Who donated it?
    - How many steps lead up from _____ to _____?
    - What is written on the wall above the sitting area in _____?
    - What year was the _____ established?
    - How many chimneys can you see on _____ building?

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*Performing Stage – Team Building Exercise*

# Kudos

**Objective:**

This activity is about practicing the act of recognition, and giving recognition where it is due.

**Materials:**

- One or two boxes - Kudos® candy bars

**Instructions:**

1. Display a Kudos® candy bars to the group, and make sure everyone knows what the word kudos means (honor; glory; acclaim).
2. Give a candy bar to each person, and explain they are to give the candy bar to someone else in recognition or appreciation.
3. Participants can give anyone a candy bar, which means that some participants may receive several while others receive none.
4. The only stipulation when giving a candy bar is that it must be accompanied by a brief and specific explanation of why they are being recognized. If the giver has trouble being specific, suggest they offer an example.
5. As team leader, you go first. Give a Kudos® bar to someone on the team. As you do so, explain what that person did to earn the bar. For example…
   *"Kudos to Vanessa for helping me research that billing error last week. She helped me whittle down the possible causes for the error. I was able to get back to the customer with an answer much quicker than if I had worked on it by myself."*
6. Encourage others to follow your lead, one at a time.
7. Initiate a short round of applause for the recipient of each award.
8. Continue until the enthusiasm dies down, or until you run out of candy bars.

**Variations:**

- Use other small rewards, perhaps something more relevant to your organization or department.
- Label other give away items or candy with a sticker reading "Kudos."

**Tips for Success:**

- Don't worry about everyone getting a candy bar. This activity is about practicing the act of recognition, and giving recognition where it is due.

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## Recognition Celebrations

**Benefits**

When recognizing team members for their successes, saying "Good job!" isn't enough. Retelling the story of their achievements is essential to effective recognition. It has several benefits:

- Explaining exactly what the team members did right clearly communicates what actions you hope they will repeat, improving the chances they will.
- Sharing specifics about the team's accomplishments makes the team members feel proud and builds self-esteem. What a great feeling it is to have someone sing our praises!
- The story creates a "role model" for others to follow. Illustrating real-life examples makes above and beyond actions feel attainable and motivates others to achieve the same.
- Repeating the story is important to do even in a private, one-on-one celebration. This tells the team member that you are well-informed of his/her contribution, which increases the genuineness of the recognition.

**Celebration Options**

When determining how best to celebrate your team's successes, there are a variety of options including:

- Private Celebration (one-on-one):
  Invite the individual team member(s) to join you for lunch or for an impromptu coffee break and then privately share recognition.

- Informal Celebration (all team members present):
  Deliver verbal recognition to each team member at a team recognition celebration. Also, open the floor for team members to share their appreciation with one another. Create a festive atmosphere, by allowing time for team members to enjoy their favorite foods.

- Formal Celebration (team members, executives and guests present)
  An executive presents recognition in a public forum.

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## Project Lessons Learned Session

A lesson learned session is a mechanism for group review that serves as a valuable phase closure. The session provides a forum for public praise and recognition for project team members, allows the team to acknowledge what worked well, and offers an opportunity to discuss ways to improve processes and procedures.

Lessons learned should be documented as part of the historical record for the current project and as a "best practice" reference for future projects. The lessons learned review should be conducted following the conclusion of each major phase and at project completion.

Participants of a lessons learned session are typically the Project Manager and project team. It may also include the customer and/or external stakeholders as appropriate. Lessons Learned may be captured and documented on the following Lessons Learned Report template.

**Options for Conducting Lessons Learned Sessions**

Option 1 - Interactive Team Approach

1. Team members or sub-teams:
   - Record project successes and factors that supported success on green post-its
   - Record project shortcomings and recommended solutions on yellow post-its
   - Display all post-its on flip charts by success and shortcoming

2. As a team:
   - Review each post-it
   - Discuss lessons learned and identify those that need to be shared with other project and functional teams

3. After session, Project Lead:
   - Document input on Project Lessons Learned - Template (below)
   - Communicate relevant information to other project and functional teams

Option 2 – Offline Team Approach

1. Individual team members complete the Project Lessons Learned - Template and submit to Project Lead

2. Project Lead compiles input and reviews with team.

3. Project Lead communicates relevant information to other project and functional teams

## Project Lessons Learned Template

**[PROJECT NAME]**

**PROJECT LESSONS LEARNED**

**DEPARTMENT:**                                **DOCUMENT OWNER:**

**FOCUS AREA:**                                **PROJECT OR ORGANIZATIONAL ROLE:**

**PRODUCT OR PROCESS:**

| VERSION | DATE | AUTHOR | CHANGE DESCRIPTION |
|---------|------|--------|--------------------|
|         |      |        |                    |
|         |      |        |                    |

**LESSONS LEARNED PURPOSE AND OBJECTIVES**

Throughout each project life cycle, lessons are learned and opportunities for improvement are discovered. As part of a continuous improvement process, documenting lessons learned helps the project team discover the root causes of problems that occurred and avoid those problems in later project stages or future projects. Data for this report was gathered by using Project Lessons Learned Record sheets and is summarized in the table.

The objective of this report is gathering all relevant information for better planning of later project stages and future projects, improving implementation of new projects, and preventing or minimizing risks for future projects.

**LESSONS LEARNED QUESTIONS**

- What worked well—or didn't work well—either for this project or for the project team?
- What needs to be done over or differently?
- What surprises did the team have to deal with?
- What project circumstances were not anticipated?
- Were the project goals attained? If not, what changes need to be made to meet goals in the future?

_____

*https://vca.berkeley.edu/resources/operational-excellence/oe-project-management-tools*

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*Adjourning Stage – Team Building Exercise*

**[PROJECT NAME]**

**PROJECT HIGHLIGHTS**

**TOP 3 SIGNIFICANT PROJECT SUCCESSES**

| PROJECT SUCCESS | FACTORS THAT SUPPORTED SUCCESS |
|---|---|
| | |
| | |
| | |

**OTHER NOTABLE PROJECT SUCCESSES**

| PROJECT SUCCESS | FACTORS THAT SUPPORTED SUCCESS |
|---|---|
| | |
| | |
| | |

**PROJECT SHORTCOMINGS AND SOLUTIONS**

| PROJECT SHORTCOMING | RECOMMENDED SOLUTIONS |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

**APPROVALS**

**PREPARED BY : _____**

**PROJECT MANAGER**

**APPROVED BY: _____**

**PROJECT SPONSOR**

**_____**

**EXECUTIVE SPONSER**

**_____**

**CLIENT SPONSER**

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## My Message to You

**Objective:**

The purpose of this activity is for the team to give positive feedback to a team member who is leaving an ongoing team.

**Materials:**

- No materials are necessary for this activity.

**Instructions:**

1. Ask team members to form a circle with their chairs.
2. Explain that the purpose of the activity is to honor the team member who is leaving by providing positive feedback to him/her on his/her contribution to the team.
3. Ask each team member, in turn, to offer a message to the departing team member, e.g. "My message to you, Jean, is thank you for your sensitivity in this group."
4. Allow for up to two minutes per team member.
5. Continue until everyone has given a message to the departing team member.

**Tips for Success:**

Give participants a few minutes to think of something to share before beginning.

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## Gift to the Team

**Objective:**

The purpose of this activity is to leave the team with positive messages from each member. This activity is particularly useful for a team that is concluding, after having met in increments over an extended period of time.

**Materials:**

- No materials are necessary for this activity.

**Instructions:**

1. Ask team members to form a circle with their chairs.
2. Outline that the purpose of the activity is to leave the team with positive messages from one another.
3. Explain what you want them to do and give an example of the type of "gift" you mean. The following suggested explanation may be used to introduce the activity:
   *"As a way of saying goodbye, think of a gift you would like to give to this team. Spend a minute visualizing this gift, which might be a physical object, such as a bouquet of flowers, or a thought or feeling, such as self-confidence -- something you would like to leave with the team as a special gift from you. When we are ready, I will begin and then we will go around so everyone will have a turn."*
4. Give participants a minute or two to think of something to share.
5. When everyone is ready, you, as team leader, go first with your "gift" (which insures everyone has the right idea) and then each person takes a turn in giving his/her "gift."

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# Additional Resources

**Books**

Bono, Edward De, Edward De Bono, and Edward De Bono. *Six Thinking Hats*. Victoria: Penguin Australia, 2008. Print.

Heermann, Barry. Building Team Spirit: Activities for Inspiring and Energizing Teams. New York: McGraw-Hill, 1997. Print.

Katzenbach, Jon R., and Douglas K. Smith. *The Wisdom of Teams: Creating the High-performance Organization*. New York: HarperBusiness Essentials, 2003. Print.

Lencioni, Patrick M. *The Five Dysfunctions of a Team*: A Leadership Fable. Hoboken: John Wiley & Sons, 2007. Print.

Miller, Brian Cole. *Quick Team-building Activities for Busy Managers: 50 Exercises That Get Results in Just 15 Minutes*. New York: AMACOM, 2004. Print.

Miller, Brian Cole. *More Quick Team-building Activities for Busy Managers: 50 New Exercises That Get Results in Just 15 Minutes.* New York: AMACOM/American Management Association, 2007. Print.

Newstrom, John W., and Edward E. Scannell. *The Big Book of Team-building Games: Trust-building Activities, Team Spirit Exercises, and Other Fun Things to Do*. New York: McGraw Hill, 1998. Print.

Scannell, Mary, and Edward E. Scannell. *The Big Book of Team Motivating Games: Spirit-building, Problem-solving, and Communication Games for Every Group*. New York: McGraw-Hill, 2010. Print.

Sikes, Sam. *Executive Marbles & Other Team Building Activities*. Tulsa: Learning Unlimited, 1998. Print.

Sikes, Sam. *Feeding the Zircon Gorilla-- & Other Teambuilding Activities*. Tulsa, OK: Learning Unlimited, 1995. Print.

Whitney, Diana Kaplin., Jay Cherney, Amanda Trosten-Bloom, and Ron Fry. *Appreciative Team Building: Positive Questions to Bring Out the Best of Your Team*. Lincoln: IUniverse.com, 2004. Print.

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# Online Learning Resources at UCB

**People & Organization Development** – content, programs, curated

https://hr.berkeley.edu/grow

- **Grow Your Career** - resources to succeed in your career growth
- **Grow Your Community** – resources to grow your network and community
- **Grow Your Engagement** - resources to maximize your job satisfaction and contribution
- **Grow Your Impact** – available consulting services
- **Grow Your Skills** – discover training opportunities available on campus and systemwide
- **Grow Your Resources** – find a collection of tools tailored to our campus environment

**Wisdom Café** – a place to grow your community & learn from your peers
https://wisdomcafe.berkeley.edu

- Gain biweekly career & professional tips from colleagues on campus
- Easily connect with others via Staff Orgs' mailing lists
- Add weekly time to your calendar & prioritize your growth
- Stay current on sessions from Staff Orgs & trainings from professionals
- Learn daily from hand-picked articles, videos, & more
- Get tips on networking & creating your own community
- Sign-up for a monthly learning newsletter
- View the latest Campus Conversation

**LinkedIn Learning** – fully online learning platform

https://hr.berkeley.edu/grow/grow-your-resources/external-resources

Lynda.com is the leading online learning platform to learn business, software, technology to creative skills. UC Berkeley's subscription provides employees with access to the Lynda.com video library of engaging, top-quality courses taught by recognized industry experts.

**Gartner - Corporate Leadership Council (CEB.Global.com)** – research, resources, best practices

https://hr.berkeley.edu/grow/grow-your-resources/external-resources

The world's leading member-based advisory company, providing research, tools, resources and best practices to leaders in a variety of industries and disciplines. UC has a systemwide membership with CEB which allows all UC employees to access these resources on an unlimited basis.

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