

Planning and NEPA Forum

**Working Effectively in
Interdisciplinary Teams**



**PARTICIPANT GUIDE
DESK REFERENCE**

Video Self-Study for ID Team

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INTRODUCTION AND HELPFUL HINTS

What is this Participant Notebook? It contains notes, references and forms to support the interactive training.

Invite Team Members:

- Invite all members of your interdisciplinary
- Most effective when **all team members** view and discuss the program together

What Should I Do Before Course?

- Print extra copies of participant guide for **each** team member
- Set up a positive environment to view the video
 - Get the largest viewing TV or Projection system to view video
 - Reserve a separate conference room or training room
 - Consider an off-site location so that team members are won't be distracted
 - Set aside 2 hours to view entire program
 - Invite managers and supervisors to session
 - Complete all of the scenarios - so participants practice the tools and techniques

What are My Roles While Viewing the Video with the Team?

- Bring this participant guide and follow along with the instructors on video
- Take notes during the video
- Stop the tape and participate in all scenarios
- Develop Action Plan listing agreed upon ways to improve teamwork
- Have follow up meetings

Video Modification

- This video was produced from the tapes of the November 18, 2004, broadcast by the National Training Center, BLM.
- The broadcast introduction, breaks, and other information were edited
- Still a few references to “push-to-talk” procedures, etc. that could not be edited

Participant Guide Modification

- The participant guide from the original broadcast was modified
- References to broadcast materials, such as fax forms, were deleted
- We retained the original page numbers from page 7 to the end of document to align with the instructor presentations and their reference to individual pages
- If you would like an electronic copy of this participant guide or extra copies of the video, email or call Catherine Book at 602-906-5550

GOOD LUCK TO YOUR TEAM EFFORTS!

Place for Follow Up Actions by Team

As a Team - Discuss and Record Your Follow Up Actions

Place For Additional Notes

INTRODUCTION

Instructors/Panelists for Course:

Joe Ross, Multi-Resources Supervisor, Roseburg DO, Oregon
(Moderator)

Linda Culver, Director, The Training Group, Phoenix, AZ (Consultant)

Abbie Jossie, Field Manager, Grants Pass FO, Oregon

Karen Kelleher, RMP Team Leader, Phoenix FO, Arizona

Jude Trapani, Fisheries Biologist, Salmon FO, Idaho

Course Goal

Working in interdisciplinary teams is a crucial part of the BLM's work. Land use planning and NEPA analysis receive a great deal of public scrutiny on both local and national levels. The effective interpersonal functioning of the interdisciplinary team directly impacts the quality and effectiveness of Resource Management Plans (RMPs), implementation plans, and NEPA documents. This training will enable interdisciplinary team (IDT) members to use tools and techniques that will improve their team skills. Teamwork that is more effective will result in improved quality of our RMPs and implementation.

Course Objectives

Discuss qualities of good teams and the factors that lead to team successes in BLM.

Given scenarios involving unproductive team behaviors, use tools and techniques that will improve interdisciplinary team skills in accordance with the participant guide.

Benefits of Effective Teams

- Commitment

- Continuous Improvement

- Improved Communication

- Empowerment

- Quality



Unit 1: Criteria for Effective Teamwork



This course will provide an overview of what it takes to be an effective team. We will cover the following 9 criteria for effective teamwork:

- 1. Build and maintain management support.**
- 2. Assign team roles.**
- 3. Establish ground rules.**
- 4. Establish a communication process.**
- 5. Establish guidelines for team decision making.**
- 6. Use project management techniques.**
- 7. Establish a climate of trust and inclusion.**
- 8. Set guidelines to deal with unproductive team behaviors.**
- 9. Have fun and celebrate milestones.**

Criteria for Effective Teamwork

1. Build and maintain management support.

- Team lead should gain commitment and direction from management to establish common goals, commitments, team composition and expertise, supervisory controls, budget control, decision space, schedules, and expected outcomes.
- Management support to build the team (skills, training, etc.)

2. Assign team roles.

(See Appendix A)

- Establish team responsibilities, roles, commitment, and accountability.
- Develop team mission and vision statements (consistent with the RMP vision statement).

Mission: a concise statement establishing direction for, and boundaries of, the team

Vision: a mental image of the future, the ability to perceive something not actually visible, describes the end result, for the team it is a goal - what it is working toward becoming or accomplishing.

- Build technical and team-skill competencies of team members (including the team leader).
- Practice shared leadership.
- Empower the team.
- Cross-training (building understanding of various resource areas).

Accountability Within the Team

- Clarifies within the team:
 - Who does what
 - How members work together
 - Commitments for results

- Answer these Questions:
 - Who is responsible for what
 - How conflicts are resolved
 - Behaviors encouraged or discouraged
 - How team decisions are supported

Accountability Beyond the Team

- Clarifies beyond the team:
 - Commitments to the public for results
 - Where to get resources
 - How to get stakeholders involved
- Answer these Questions:
 - Who initiates key tasks
 - Who needs to be informed/consulted
 - Input/resources needed
 - How to get needed support
 - How to ensure success

Criteria for Effective Teamwork

3. Establish ground rules. (See Appendix B for examples)

- Set rules for good business practices.
- Establish procedural and logistical norms.

- BEFORE MEETING:
 - Limits: time, policy, authority
 - Goals: yours, management
 - Define: where, when, what, how, etc.
- DURING MEETING:
 - On time, stick to agenda, all participate
 - Maintain order, clarify statements, respect each other
 - Assign tasks
- AFTER MEETING:
 - Follow-up
 - Check results



Brainstorming: an intentionally uninhibited group technique for generating a lot of ideas.

Brainstorming Rules:

1. Quantity is desired, NOT quality.
2. Wild ideas are encouraged.
3. No criticism or judgments are allowed.
4. All ideas are recorded.

Criteria for Effective Teamwork

4. Establish a communication process.

- Set schedule for meetings.
- Plan for meeting management .
- Use of facilitators.
- Guidelines for informal communications.
- Information and planning from the team are shared with other teams.
- Adhere to deadlines.
 - Speaking clearly and being concise.
 - Listening actively and avoiding interruptions.
 - Sharing information.



Criteria for Effective Teamwork

5. Establish guidelines for team decision making.

- Problem solving to reach consensus.
- Define “consensus.”



Consensus is **NOT**:

A unanimous or majority _____.

A situation when _____ is totally satisfied.



Consensus **IS**:

A proposal _____ enough that all members can support it.

Consensus Requires:

- _____
- Active _____ of _____ group members.
- _____ skills.
- Creative _____ and _____.

Criteria for Effective Teamwork

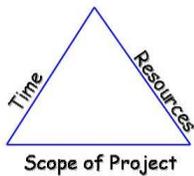
6. Use project management techniques.

Good project management assists the interpersonal aspects of the team by:

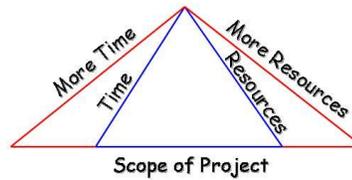
- Establishing scope
- Clarifying roles
- Identifying tasks, and the task relationship
- Identifying and mitigating risks
- Allocating resources
- Identifying and controlling change

In order to: complete project on time and within budget.

Project Management



Project Management



Establish Trust & Inclusion

- Openness
 - Sharing ideas, questions and concerns
 - Not holding back information
- Credibility
 - Demonstrating your competence
 - Doing what you say you will do
 - Owning up to lapses in accountability
- Respect
 - Acknowledging the skills and expertise of your team
 - Responding to the legitimate concerns of your team members
- Accountability
 - Promises/Commitments/Agreements can be relied upon
 - Task-oriented and team behavior contracts
 - Focus on external behavior and tangible results



Criteria for Effective Teamwork

8. Set guidelines to deal with unproductive team behaviors.

Ground Rules can be the first step for:

- Managing conflict
- Dealing with negativity
- Dealing with sabotage
- Dealing with lapses of commitment and accountability
- Dealing with personal values in conflict with BLM/team/mission/vision/RMP
- Advocacy vs. representation
- Dealing with hidden agendas and defensive competition
- Indicators of potential trouble are:
 - Some team members with too much influence
 - Some team members contribute only at times, or on certain subjects or topics

Conflict:

Conflict is the result of any opposition or antagonistic interaction.

- Can be functional/healthy or can be dysfunctional/unhealthy
- Normal and natural
- Occurs for many reasons

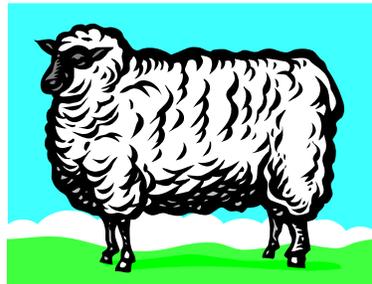
Another contributor to conflict can be non-verbal communication.

Conflict Resolution Blocks



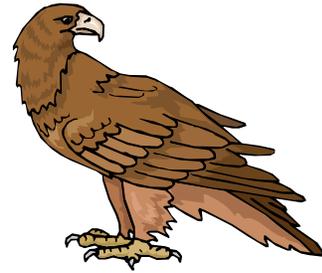
Aggressive in Conflict

- Uses an attack mode
 - Loaded with past annoyances
 - Hurtful
 - Results in MORE CONFLICT
-
-



Passive in Conflict

- Gives in even when doesn't want to
 - Usually gets back (retaliates) later
 - Can become victims
-
-



Assertive in Conflict

- Only style that resolves conflict
- Able to find mutually agreeable solutions
- Embraces win/win resolutions

Assertiveness: A natural style that is direct, honest, and _____, while interacting with others.

See Appendix C for Conflict Resolution Tips.

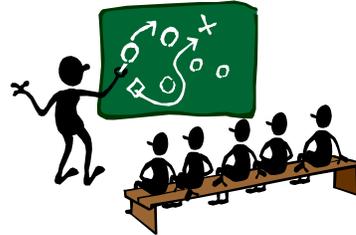
Criteria for Effective Teamwork

9. Have fun and celebrate milestones.

- Recognize Achievement.
- Have fun.



Unit 2: Three Stages of Team Development



Stage 1: Orientation

Question to resolve: **Why are we here?**

Characteristics:

- Polite
- Reserved
- Uptight

Work Issues:

- Goals
- Objectives
- Priorities

Personal Issues:

- Energy/Influence
- WIIFM
- Curiosity

Strategies

- Break the ice
- Active participation
- Solicit input and humor

Stage 2: Power and Tasking (or Influence and Work Performed):



Characteristics:

- Norms established
- Control/power
- Cliques develop
- Poor decisions
- Hidden Agendas

Work Issues:

- Roles
- Responsibilities

Personal Issues:

- Control
- Leadership
- Influence

Strategies:

- Listening
- Dealing with differences
- Sensitivity to feelings



Stage 3: Team Production/Feedback (Greatest Potential and Highest Level of Productivity)

Characteristics:

- Cohesion
- Work as a single unit
- Productivity increases
- Hi level of cooperation

Work Issues:

- Have been resolved

Personal Issues:

- Have been resolved

Strategies:

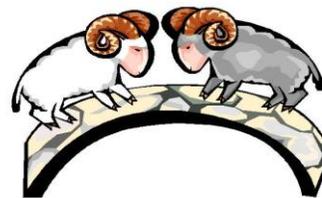
- Keep on track
- Don't over control
- Distribute tasks
- Praise and recognition

Unit 3 Team Pitfalls



Hidden Agendas

Results from personal feelings toward:



Defensive Competition:

Can result between:



Sabotage:

Rears its ugly head in many ways:

Success in a Nutshell



1. _____ and _____ group problems or challenges when possible.

2. Think of each hurdle as a _____ challenge.

3. Act quickly. Behaviors that go on for a long time become _____.

Unit 5 Tools and Resources

Here are other training courses you may want to consider. Most of the courses can be brought to your local office for delivery to your team. Others are offered throughout the year at various locations throughout BLM.

Working in Teams (1252-06): Field Delivery

Learn how to form an effective team and continue to develop the trust and synergism needed for efficient teamwork. This 3-½ day course provides instruments for learning about each other and tools for effective meetings, brainstorming, and problem solving.

- +Develop mission statements.
- +Write team ground rules and operating procedures.
- +Use problem solving processes.
- +Practice team building skills.

Target Audience: BLM employees and managers at all professional levels. Course is delivered at request of WO/SO/FO/Center and is brought to your location.

Cost: \$3500 – for the requesting office. The cost of renting a training room also to be paid by the requesting office.

NTC Contact: Barbara Hollway, 602-906-5542

Building a High Performance Team (1252-07): Field Delivery

This 2-½ day advanced workshop is designed for management level teams and employee teams that already practice the essential basics of teamwork and are looking to move toward increasing the competencies necessary to execute their purpose and goals through collaborative efforts. Emphasis is placed on clarifying values, resolving differences, influencing accountability and building trust as well as formulating strategies for future direction.

Target Audience: Employee teams and management teams in BLM.

Cost: \$2500 for the requesting office. The cost of renting a training room also to be paid by the requesting office.

Prerequisites: Completion of NTC's Course 1252-06 Working in Teams or equivalent.

Contact: Barbara Hollway (602) 906-5542

Facilitator Skills (1400-10): Field Delivery

A 2-day workshop to practice leading, facilitating, recording, and participating in meetings.

- Preparation tasks (i.e., notices, agendas, room arrangements, supplies).
- Agenda items (i.e., purpose, introductions or activities, functions).
- Four key functions for successful meetings (i.e., leader, member, recorder, facilitator).
- Effective recording of group memory.
- Facilitating attitudes and skills that assist groups.
- Observing and handling group dynamics, including "groupthink."
- Group processes: brainstorming, discussion, problem solving, and reaching consensus decisions.

Target Audience: Employees who currently facilitate meetings or those who plan to facilitate meetings. Your office can request that a class be brought to your location. All nominations must come through your local training officer.

Cost: \$2000 – for requesting office. The cost of renting a training room also to be paid by the requesting office.

NTC Contact: June Clay, 602-906-5544

Community Based Partnerships (1730-21): Field Delivery

Our future depends on strong relationships with the stewards of the land and their communities. This 3-day course will teach you how to recognize, build and sustain successful community-based partnerships that ensure a healthy environment and community.

- * Recognize opportunities for partnerships.
- * Formulate a shared vision for citizens and government working together.
- * Develop an effective partnering process.
- * Discover how to cultivate, motivate and sustain partnering relationships.
- * Participate in the partnering process by:
 - Understanding community structure and dynamics.
 - Determining who is affected by an issue and how to include them.
 - Understanding behavior relative to partnering.
 - Building capacity at the community level.

Target Audience: Persons in field offices from all agencies, nongovernment organizations and private citizens with interest in potential partnerships and in positions to support partnerships.

Tuition: Individual \$450. Offices can arrange for local delivery with site sponsor process.

NTC Contact: Charles Pregler, 602-906-5504

Planning Concepts (1610-06): Field Delivery

This 2-day course provides a solid kickoff for new plan starts. This is an excellent forum to engage team members and collaborators in a meaningful dialogue during the pre-planning phase. Takes planning questions from area issues and develops a strategy of whom to involve and what the opportunities are. Includes:

- What are top-level concepts of collaborative planning.
- How to address issues, trends, and concerns.
- What plan decisions are needed to address opportunities.

Target audience: Planning team members, managers, collaborators, other agency, etc.

NTC Contact: Terry Loyer, 602-906-5553

Planning Nuts & Bolts (1610-09): Field Delivery

This award winning 3½ day class provides planning and EIS basics includes:

- Overarching themes of collaboration, data management, adaptive management, and administrative record.
- Best practices for preparation plan, analysis of the management situation, scoping, issue identification, goals and objectives, management alternatives, draft and final plan/EIS, record of decision, and monitoring.

Target audience: RMP team members, partners (local, state, other federal agencies; tribes; resource advisory councils), state program leads, managers, and contractors. (Note: this course is offered at no tuition cost to the target audience. The fee is \$500 for contractors who are not working on the targeted plan.) This course is intended for offices that are in the early phases of their planning process.

NTC Contact: Cathy Humphrey, 602-906-5536.

Project Management for Planners (1610-07): Regional Delivery

This 4½ day class on project management fundamentals addresses how to:

Estimate scope, schedules, costs, and resources needed

- Identify and mitigate risks.
- Build work breakdown structures.
- Organize human and fiscal resources to accomplish plan.
- Uses actual RMP process as case study for week.

Target audience: Team leaders, principle team staff, project managers, and others responsible for producing quality land use plans, EISs, and related projects.

NTC Contact: Terry Loyer, 602-906-5553

NEPA Analysis (EA Focus) (1620-13): Field Delivery

This is a 3-day class emphasizing tools to prepare defensible, streamlined environmental assessments (EAs) consistent with the BLM NEPA Handbook. In addition to providing an overview of NEPA and CEQ, this highly interactive course introduces a multitude of tools to write legally defensible EAs. It includes the following:

- Using proper documentation,
- Conducting adequate analysis,
- Streamlining the process,
- Assembling the administrative record, and
- Involving the public.

Target Audience: BLM employees who write or review environmental assessments. It is most effective when the majority of EA writers in an office attend the class together.

NTC Contact: Cathy Humphrey, 602-906-5536

Alternative Dispute Resolution and Collaborative Action Courses: Field, Regional, and Computer-based Delivery

The planning and NEPA staff at the NTC is working with national dispute resolution manager to develop a suite of courses in alternative dispute resolution and collaborative action (ADR/CA). The courses will include introductory computer-based course, an advanced ADR course, a symposium for field offices with ADR pilot projects, and a ½-day manager's course. These courses will introduce principles and tools to increase the chances of successfully preventing or reducing conflict specific to a field office or project. The major topics will include the following:

- Conducting and evaluating the results of a conflict assessment, and
- Designing a process to resolve a conflict or potential conflict.

Target Audience: BLM field managers, appropriate BLM staff, and stakeholders involved in the dispute.

Contact: Paul Politzer, WO-200, 202-452-0349; or Cathy Humphrey, NTC, 602-906-5536.

Appendix A – Example Team Mission and Vision Statements

LMDT 1 Grants Pass Resource Area Soaring Eagles

Mission

To design and implement ecologically sound and socially respectful land management projects with a productive IDT perspective in a timely, fun way.

Vision

LMDT 1 flourishes in an environment of perpetual change and is highly regarded for its sustainable, ecologically sound and scientifically credible land management practices.

Bureau of Land Management-Medford District
Landscape Management Development Team 2

LMDT2 MISSION

To work together as an ID team with the public to create projects that sustain and manage biological and social resources in a productive fun manner that balances our team members' values and skills.

LMDT2 VISION

We have a dream that the landscape would be left better than before; that we have public partners that support our programs and our communities thrive from a sustained resource output while providing for an ecologically sound and resilient landscape

Salmon Field Office Mission

"A team with a presence on the land for the husbandry of resources in partnership with and for the people."

Appendix B – Example Team Ground Rules

LMDT 1 – The Soaring Eagles Ground Rules

- 1) Smile and have fun.
- 2) Each project has a lead.
- 3) Ensure roles/responsibilities are clearly understood.
- 4) Each individual responsible to ensure closure on discussions/decisions. Decisions by consensus.
- 5) Have deadlines and clear timeframes.
- 6) Rotate team leadership (6 months).
- 7) Team members present on time. No back-ups.
- 8) Follow the agenda.
- 9) Be prepared with completed assignments.
- 10) Don't interrupt.
- 11) No distractions (cell phones, side conversations, outside work).
- 12) Designate note taker before hand.

Appendix B – Example Team Ground Rules

Bureau of Land Management-Medford District
Landscape Management Development Team 2

GROUND RULES

Follow agenda.

Submit input on time.

Round table decisions (thumbs up or down).

Set time limits (start, end, topic time limits).

Have facilitator.

Establish roles & make assignments.

Set interim goals / review accomplishments.

Accountability.

Show respect.

Stay on topic.

Appendix B – Example Team Ground Rules

BLM Salmon Field Office

Ground Rules for Meetings:

1. Seek first to understand.
2. Have respect and courtesy for one another.
3. Remember the golden rule – treat others how you would like to be treated.
4. Take the time necessary to resolve disagreements.
5. Share all relevant information.
6. Be there, both physically and mentally.
7. Validate everyone's role and ideas.
8. Be flexible.
9. Have fun!! Use humor!!
10. All questions are valid – there are no dumb questions.
11. Listen to who is speaking.
12. No side conversations.
13. Sit in one large circle – no back row.
14. Have constructive input.
15. No intentional insults.
16. No swearing or offensive gestures.
17. Minimize rabbit trails.
18. Take breaks together – anyone can call for a break.
19. Don't say things behind someone's back if you can't say it to them.
20. Be on time to start.
21. Try to be concise.
22. Avoid being distracting to others.
23. Be prepared before you come.

Appendix C – Conflict Resolution Tips

- **Move away from aggressive or passive behavior and become assertive.**
- **Use facilitators.**
- **Listen actively and avoid interruptions.**
- **Communicate “I” messages.**
- **Maintain eye contact.**
- **Speak clearly with a firm tone.**
- **Emphasize points.**
- **Visualize ideal outcome while speaking.**
- **Consider all viewpoints.**
- **Make sure others hear other viewpoints.**
- **Work for consensus.**
- **Create win/win resolution.**