



Safety & Health Improvement Program

Team Effectiveness Process (TEP)



Enhancing Team Effectiveness, Safety, and Quality of Work-Life



Welcome to the Team Effectiveness Process™ (TEP)

The Team Effectiveness Process (TEP) was created for the Safety, Health and Improvement Program (SHIP) toolkit **as a facilitation guide for structured group discussions** focused on working together to increase team effectiveness, commitment to safety, and quality of work-life.

Focus groups and team discussions can be very effective in reducing workload pressures, stress, and work-life conflicts for employees while also increasing team performance. This facilitation guide was developed by WFD Consulting in collaboration with the Oregon Healthy Workforce Center.

TEP includes important strategies that managers and supervisors can use to effectively address some of the negative impacts of heavy workload while increasing effectiveness and well-being of employees. TEP involves structured group discussions focused on working together to increase team effectiveness, commitment to safety and quality of work-life can be very effective in reducing workload pressures, stress and work-life conflicts for employees and for increasing team performance.

The TEP Facilitation Guide is designed to:

- Identify and discuss causes of work inefficiencies, stress, and work-life conflict.
- Think through root causes and develop solutions that are within the team's control.
- Agree on and implement team work practices to improve teamwork, morale, communication and effectiveness in day-to-day work.



Visit YourWorkpath.com/SHIP for more information on the full toolkit and additional Total Worker Health® resources, tools, and toolkits.



Safety & Health Improvement Program

2020 © Copyright OHSU. All Rights Reserved

Why is Team Effectiveness Important?

As a manager/supervisor, you play a critical role in creating a supportive, safe work environment and leading a highly effective team that delivers results for the organization.

In studies across many organizations, these common themes have been shown to reduce employee engagement, resilience, and performance:

- **Time wasters.** Employees around the world consistently report spending about 20 percent of their time, essentially one day per week, on work that is redundant, is not a priority for the business, and that feels like a waste of time.
- **Information overload.** This can include too much email and internal communication.
- **Ineffective business processes and systems.** This may include bureaucratic processes that slow down decision-making and action.
- **Last minute and urgent requests from clients, customers, and coworkers.** These requests may all seem urgent and contribute to the confusion and stress of conflicting priorities, distracting employees from focusing on what is really important for the business.
- **Lack of adequate planning to avoid crises and emergencies.** Not taking the time (individually and with others involved) to plan a project or work process often leads to inefficiencies that impact performance and results.
- **Too many unproductive meetings.** Spending too much time in meetings that are inefficiently run and irrelevant hinders us from focusing on priorities and contributes to work overload.



Organizational Success Factors

In order for TEP to be effective in improving individual, team and business performance, the following success factors must be considered when implementing the process on a functional or organizational level.

- **The commitment of senior leadership** to the success of TEP and to addressing critical systemic issues and organizational barriers that are identified
- **The accountability of senior leadership** for tracking issues, trends, actions, best practices and business results and addressing organizational issues that are out of control of individual work groups
- **Communication and feedback** across the organization about the issues and best practices identified by teams participating in TEP
- **The collaboration of HR management and organizational leadership** to ensure success



Overview: SHIP Champion



The role of the Champion in TEP is to provide guidance and support managers and supervisors within teams and work groups throughout the process. Here are some areas the Champion could support during the TEP process:

- **Assess interest, support and accountability of organizational leaders** for implementing TEP widely. Agree to provide them with key issues, actions, results and best practices that come out of the process.
- **Identify managers/supervisors** interested in utilizing TEP materials and tools.
- **Promote and train team and line managers/supervisors** using this guide. Print, distribute, and provide guidance and training on how each supervisor, manager or team lead will help facilitate and run TEP sessions. Brief managers/supervisors on the purpose and benefits of using TEP with their team/work group.
- **Conduct meetings or prep calls with managers/supervisors** to ensure that they understand the purpose of TEP; the TEP Facilitation Guide and tools; the roles and expectations of HR and managers/supervisors; and to establish desired outcomes for the team. This can be done through monthly or bi-monthly meetings of the employee teams for TEP with supervisor input and agreement.
- **Check in on team meetings to answer questions, and follow-up on TEP** with each team and their manager, supervisor or team lead 30 days after first TEP meeting, and once per month, for the next 6 months.
- **Remind manager/supervisor to conduct follow-up meetings** and discussions with the team by utilizing the TEP Follow-Up Process Discussion Guide.
- **Loop back to organizational leadership** once TEP sessions have been completed. Share and report employee experience, lessons learned, common themes and issues, potential solutions, action plans and best practices.
- **Distribute incentives to participants** (if offered) and collect feedback through surveys and focus groups (if applicable)

CHAMPION



- **Lead the TEP process with leadership.** Ensuring buy-in and commitment of senior leadership is critical to the success of TEP and to address systemic issues and organizational barriers.
- **Work with supervisors and managers to set up TEP with their teams.** Determine which TEP option works best and the time commitments required. Ensure teams know the process before beginning.



Safety & Health Improvement Program

2020 © Copyright OHSU. All Rights Reserved

Overview for Managers and Supervisors

The role of the manager/supervisor is to review the TEP facilitation materials (found in the following pages) and facilitate up to three TEP meetings with your team. During these meetings, you will work with your employees to identify inefficient work practices and build new action plans to improve the team's effectiveness. Specifically, you will review and discuss the biggest time wasters, inefficiencies, and causes of work-life conflict for the team using the TEP delivery options, tools, and supplemental resources.

The concept of TEP Operating Principles, a roadmap to team success:

- Operating Principles are agreements and ground rules between team members regarding how they will work together to enhance team effectiveness, morale, communication, safety and work-life support.
- They should be broad behavioral statements that will serve as a reminder of what the team is striving for and provide guidance on how to reach their desired work environment.
- The TEP Operating Principles Template identifies potential categories to consider: Trust and Respect; Support for Personal Goals and Life Priorities; Communication and Collaboration; Safety to Your Employees.

After the TEP Discussions: Follow-Up

Conduct follow-up TEP discussions monthly or bi-monthly basis with your team as part of team/workgroup meetings to reinforce TEP Operating Principles, discuss progress on the action plan, and address any new issues or inefficiencies. The goal is to embed effective ways of working into the team's day-to-day work practices. Refer to the TEP Follow-Up Discussion Guide.

- Communicate TEP results, success stories and best practices to organizational leadership and other team managers/supervisors to encourage their future participation in TEP.

TEP Sessions: Three Ways to Deliver TEP

Option A – 3 hours

Recommended option to maximize time, effectiveness and ensure continuity. A 30-minute Kick-Off Meeting followed by one 60-minute TEP Session and a second 90-minute TEP Session.

TEP Kickoff Meeting - 30 mins

Session I - 60 mins

Session II, III - 90 mins (combine two sessions)

Total Time - 3 hours

Option B – 3 hours

Recommended option for teams that can't take more than one hour per session. A 30-minute Kick-Off Meeting followed by two 60-minute TEP Sessions and a final 30-minute TEP Session.

TEP Kickoff Meeting - 30 mins

Session I - 60 mins

Session II - 60 mins

Session III - 30 mins

Total Time - 3 hours

Option C – 2.5 hours

Recommended option for teams that have less time available and want to conduct one longer session or between two meetings. A 30-minute Kick-Off Meeting followed by a 120-minute/2-hours TEP Session.

TEP Kickoff Meeting - 30 mins

Session I, II, III - 120 mins (combine all sessions into 2 hours)

Total Time - 2.5 hours

TEP Tools Overview: Refer to the tools during your TEP Session A, B, C

SESSION I

Use Tool #1: TEP Operating Principles and Action Plan Template

- Use this tool to help your team generate the operating principles for your TEP team discussions and to record top priority issues/time wasters and solutions/action items developed by the team as part of the TEP process

SESSION II

Use Tool #2: Develop Solutions: Examine Your Team's Workload and Causes of Inefficiencies and Develop Solutions with Your Team

- Use this tool for Ideas on discussions and solutions for TEP team discussions

SESSION III

Use Tool #3: Guide Employees in Maximizing High-Value Work

- Use this tool to start a discussion to help employees maximize high-value work and minimize time wasters

TEP Follow-up Materials

Follow-up Guide: Check-ins are an essential part of the Safety & Health Improvement Program (SHIP)

- Supportive Supervisor Behaviors: Quick Reference Guide to continue to check-in on your supportive supervisory behaviors
- Continue to conduct TEP follow-up monthly discussion guide to use with team/workgroups



Safety & Health Improvement Program

2020 © Copyright OHSU. All Rights Reserved

PRIOR TO TEP SESSIONS

Schedule time for the TEP Sessions, no more than 1 week apart, depending on the TEP implementation option that works best for your work teams.

- **Option A** – A 30-minute Kick-Off Meeting, followed by one 60-minute TEP Session and second 90-minute TEP Session
- **Option B** – A 30-minute Kick-Off Meeting followed by two 1-hour TEP Sessions and a final 30-minute session
- **Option C** – A 30-minute Kick-Off Meeting followed by one 2-hour TEP session

Arrange for an appropriate meeting room that is conducive to open, confidential, safe discussion with a large group as well as small group breakouts.

Confirm equipment needed:

- Two flipcharts, markers, and masking tape or pins
- LCD projector and laptop



Invite your team members to attend the 30 minute TEP Kick-Off Meeting via email or team meeting. Describe the purpose of TEP, the process (TEP Kick-Off meeting, TEP Assessment, TEP sessions) and provide the date, time and location of the meeting.

- You may choose to conduct the TEP Kick-Off Meeting as part of a regularly scheduled staff/team meeting.

Conduct TEP Kick-Off Meeting with your team and agree upon the schedule for completing the TEP sessions.



TEP KICK-OFF SESSION (Options A, B, C) - 30 MINUTES

Welcome team members to the meeting. Review the purpose and desired outcomes of the Team Effectiveness Process (TEP) and provide an overview and schedule of TEP sessions. **[TEP Briefing Slides #1 – What is TEP?]**

- Identify and discuss causes of work inefficiencies, stress and work-life conflict.
- Think through root causes and develop practical solutions that are within the team's control.
- Agree on and implement team work practices to improve teamwork, morale, communication and effectiveness in day-to-day work.
- Foster a work environment of safety, wellbeing, collaboration and support for work-life integration.

Describe the SHIP Components and the purpose of TEP as a process designed for managers/supervisors to use to conduct structured discussions with their team/workgroup **[TEP Briefing Slides #2 – SHIP Components]**

Explain that a work environment that promotes employee health, safety, work-life integration and team effectiveness results in positive outcomes for individuals, teams and the organization. Reducing low-value, inefficient work practices and increasing team effectiveness, are key factors in reducing stress and work-life conflicts for employees and for increasing individual and team performance. **[TEP Briefing Slides #3 – TEP Overview]**

- **Explain** that TEP has been successfully piloted in industries with different types of jobs. It has been piloted and implemented at the City of Portland, Oregon Bureau of Transportation and Portland Water Bureau.
- **Describe** in your own words why you think it is important for your team to engage in this process.

Ask team members to actively participate in the discussion, honestly share their ideas about how they can work more effectively together to enhance the quality of day-to-day work and life. Their active involvement and input is critical to success!

Provide an overview of each step and the schedule for your team in the TEP process. **[TEP Briefing Slides #4 - TEP Sessions Agenda]**

- **TEP Kick Off Session**, which we are having today to discuss the purpose and overview of TEP and establish our team's desired outcomes and "vision of success".



TEP KICK-OFF SESSION (Options A, B, C) - 30 MINS CONTINUED

Participate in TEP Sessions. Describe the TEP options (A, B or C) that you have selected for your team [\[TEP Briefing Slides #4 - TEP Sessions Agenda\]](#)

In the TEP session/s we will:

- Establish Team Effectiveness Operating Principles.
- Identify the biggest time wasters, inefficiencies and causes of work-life conflicts for the team, focusing on things we can influence or control.
- Explore the root causes for the key issues and develop potential solutions the team has some control over.
- Establish an action plan and “quick wins”.
- Agree on a follow-up plan to discuss and evaluate progress.

Discuss the team’s “vision of success” – characteristics of their desired work environment and what they hope to achieve through TEP. [\[TEP Briefing Slides #5 - Vision of Success\]](#)

- Reiterate the overall purpose of TEP and desired outcomes – increased work efficiencies, teamwork, collaboration, commitment to safety and quality of work-life, our desired state.

Facilitate a discussion with team about the characteristics of their desired work environment.

- If you could create an ideal team work environment what would it be like, feel like?
- If this TEP process is successful, how would things be better?
- If this process works well for us and we came back together in a few months, how would we be working together as a team?
- For example: Better communication and coordination between team members; Respecting team members and treating each other as we want to be treated; More focus on safety practices; Support and understanding from team members and manager for meeting personal responsibilities as well as business requirements.

Record characteristics of desired team work environment generated by participants on a flipchart. (Save these flipcharts to post and refer to in subsequent meetings).

Summarize the discussion and how it relates to the sessions that follow.

- To achieve success through this process and reach our vision of success, we need to take a look at our current work environment, build on our strengths and identify areas for improvement – especially those things we can influence or control.
- In the TEP sessions we determine what actions we can take as a team to enhance effectiveness and quality of work and life for each of us.

Confirm the dates, times and location for the follow-up TEP Sessions.

Thank team members for their participation and close the meeting.



TEP SESSION 1 - 60 MINUTES

Use this TEP Session I guide for TEP Options A, B, and as the first half of C.

Review the purpose of TEP and the team's vision of success – characteristics of a desired work environment. (5 minutes)

- **Reiterate** the purpose and desired outcomes of TEP as described in the Kick-Off Session: increased work efficiencies, teamwork, collaboration, commitment to safety and quality of work-life.
- **Review** the characteristics of the team's desired work environment that they identified, referring to what was recorded on a flipchart during the Kick-Off Meeting. (Post flipcharts for reference)

List Major Time Wasters on a Flipchart (20 minutes)

On a flipchart, list team practices that are strengths or areas for improvement that will help foster an environment of good morale, communication, teamwork, safety and work-life effectiveness.

- Briefly review and acknowledge the practices the team is already using that are strengths and best practices to continue and build upon.
- Ask the team if there are additional practices that the team may be doing to foster an environment of safety, well-being, teamwork and work-life effectiveness.
- Briefly review the practices that are areas for improvement. These are issues the team will want to address when establishing TEP Operating Principles.

Review and discuss the biggest time wasters, inefficiencies and causes of work-life conflict for the team.



Safety & Health Improvement Program

2020 © Copyright OHSU. All Rights Reserved

TEP SESSION 1 - 60 MINUTES CONTINUED

Quickly gain consensus from the team on the top two to four issues – biggest time wasters, inefficiencies and causes of work-life conflict that the team has some control over or can influence. [TEP Briefing Slides #6 - Biggest Time Wasters for our Team]

Note: The number of issues that the team works on will depend on the amount of time you have for TEP and the number of employees in your team. If you have fewer than 8, select two issues and plan to problem solve in one large group. If you have more than 15 people, plan to select four issues and divide into 4 small groups for problem solving. Leave extra time for the small groups to report out. If you have less time, select fewer issues and plan to problem solve in one large group.

- The group may decide to combine or eliminate issues while agreeing upon the ones they will work on in this meeting.
- The priority issues selected should be things the team can control or influence, and that solutions can be developed and implemented fairly quickly and have an impact.
- The discussion should be brief – clarifying issues/getting examples. Don't move to a detailed discussion of an issue at this point – this will be addressed in the next session/section on root cause analysis.

Ask individual team members to vote by a show of hands on the two issues that they think the group should work on, i.e., "If you had to pick two issues for us to work on today, which issues would you choose?"

Record the top two to four issues that have emerged on a flipchart. These are the priority issues for action in the next TEP session/section.



TEP SESSION 1 - 60 MINUTES

Tool 1: Establish TEP Operating Principles

Safety, Work-Life, and Team Effectiveness Operating Principles

Introduce the concept of TEP Operating Principles. The TEP Operating Principles are agreements and ground rules between team members regarding how they will work together to achieve their desired work environment, including enhancing teamwork, communication, and commitment to safety and work-life effectiveness. They should be broad behavioral statements that will serve as a reminder of what the team is striving for and a roadmap for success. The operating principles should be revisited by the team throughout the year. [\[TEP Briefing Slides #7 - Establish TEP Operating Principles\]](#)

NOTE: If time is short, provide instructions for establishing TEP Operating Principles for the team and give as homework: Ask each team member to write down a potential operating principle in each category using the TEP Operating Principles Template and bring to the next TEP Session.

Establish TEP Operating Principles.

- Refer to the flipchart list of Characteristics of the Desired Work Environment that the team identified at the beginning of this session to determine areas to address.
- On a new sheet on the flipchart, put up the 5 categories (see next page) to consider: Trust and Respect; Support for Personal Goals and Life Priorities; Communication and Collaboration; Safety.
- Discuss briefly and define the two to three categories the team should focus on to develop operating principles and ground rules for improving group teamwork, morale, communication, safety and support for work-life effectiveness
- Suggest making statements/principles that begin with “We will ...”

TEP SESSION 1 - 60 MINUTES

Tool 1: Establish TEP Operating Principles Continued

Use this tool to develop team agreements and ground rules between team members regarding how they will work together to increase team effectiveness. (30 minutes)

- Choose 2-3 categories from the 5 categories listed in the table below that will most help the team improve group teamwork, morale, communication, safety, and support for work-life effectiveness.
- Create statements/principles that begin with “We will” ...

Operating principles might include commitments such as the following:

- We will listen to and respect each other’s ideas and concerns.
- We will each take responsibility to ensure safety procedures are followed at all times.
- We will support each other in meeting personal goals and priorities by covering work and backing each other up when necessary.

Trust and Respect	
Support for Personal Goals and Life Priorities	
Communication and Collaboration	
Safety	
Other	

TEP SESSION 1 - 60 MINUTES CONTINUED

Tool 1: Establish TEP Operating Principles Continued

Examples:

- ♦ **Category: Trust and Respect** - *We will listen to and respect each other's ideas and concerns without interruption or judgment*
 - ♦ **Category: Communication and Collaboration** - *We will clearly communicate project timelines and deliverables to the team at the beginning of a project.*
 - ♦ **Category: Safety** - *We will each take responsibility to ensure safety procedures are followed at all times and be willing to call out infractions if they occur.*
 - ♦ **Category: Support for Personal Goals and Life Priorities** - *We will support each other in meeting personal goals and priorities by stepping up to help cover work and backing each other up when necessary.*
-

Next, lead a large group discussion or divide into smaller groups assigning each group a category to develop some preliminary Operating Principles around.

For a small group discussion:

- Divide team into two to three small groups and assign each group one topic to discuss; begin developing potential operating principles. Ask each group to record ideas on flipchart. After 10-15 minutes, ask each group to report out their ideas to the large group.
- Have groups report out on their ideas and facilitate large group discussion asking other participants to comment on the proposed Operating Principles encourage them to add their ideas.

For large group discussion:

- Lead large group discussion about ideas for Operating Principles in selected categories and capture on a flipchart.
- Explain that the issues addressed by the TEP Operating Principles may overlap with the action planning items that will be identified in the last part of the meeting.
- A subgroup will be assigned to refine these operating principles as part of the action plan, and the team will build on these in subsequent meetings.



TEP SESSION 1 - 60 MINUTES CONTINUED

Tool 1: Establish TEP Operating Principles Continued

Team Effectiveness Process™ Action Plan Template

Use this template at the end of TEP Session 1 to record the top priority issues/time wasters and solutions/action items developed by the team as part of the process.

This template is also provided in the **SHIP Follow-up Guide** so you can document the progress that has been made on the action items your group identified.

	TOP ISSUES/TIME WASTERS	SOLUTIONS/ACTIONS
1		
2		
3		
4		
5		

Close the session and confirm the time and location of the next meeting. The next TEP session should be conducted within a week to maintain momentum. (5 minutes)

TEP SESSION II - 60 to 90 MINUTES

Use this TEP Session II guide for Options **A – 90 minutes**, **B – 60 minutes**, or the second part of **C – 60 minutes**.

Review the purpose of TEP, the team's vision of success and what was accomplished in previous session. (10 minutes)

- **Reiterate** the purpose and desired outcomes of TEP as described in the Kick-Off Session: increased work efficiencies, teamwork, collaboration, commitment to safety and quality of work-life.
- **Review** the characteristics of the team's desired work environment that they identified, referring to what was recorded on a flipchart during the Kick-Off Meeting. (post the flipcharts for reference)
- **Refer** to the team TEP Operating Principles that were generated in the last meeting (post the flip charts for reference). Explain that you will address these as part of the action planning process at the end of this session.
- **Review the top two to four issues on your Action Plan Template** that the team identified as the biggest time wasters or inefficiencies that the team can influence or control. (Write them on a flip chart for reference)



TEP SESSION II - 60 to 90 MINUTES

Determine root causes for and potential solutions to the biggest time wasters and inefficiencies for the team. (40 minutes) [TEP Briefing Slides # 9– Determining Root Causes for Time Wasters]

Divide the team into two to four small groups and assign each group one issue to work on. They will quickly brainstorm root causes, record these on a flipchart, and report out to larger group, inviting additions to the list.

Note: If the group is small (under 6 people) and/or time is short, you may develop root causes and potential solutions for each issue as a large group discussion. If the group is larger than 15, consider dividing into 4 groups so that everyone has a chance to contribute. With more small groups, you may need to build in additional time for the groups to report out.

- **Explain** that effective problem-solving requires that we first spend some time thinking about the underlying causes of the problem in order to develop good, viable solutions. Often the time wasters and inefficiencies are symptoms of underlying issues that need to be addressed.
- **Ask** the following questions to stimulate thinking:

Why does this happen? What causes the problem? Why is it a problem? What are some examples?
- **Provide** some examples of root causes taken from other teams who have gone through this process, to stimulate ideas.

ISSUES	ROOT CAUSES
Poor communication practices	<p>Lack of regular meetings or discussions as a team to plan work priorities and responsibilities</p> <p>Information passes down from management through email - not everyone has access to email during the day</p>

TEP SESSION II - 60 to 90 MINUTES CONTINUED

Provide each group with a flipchart and ask them to write their assigned issue on the top of the page.

Ask the small groups to discuss their ideas about root causes and record them on the flipcharts.

- **Encourage groups to stay focused on root causes** and avoid moving on to solutions – they will have the opportunity to develop solutions shortly. After about 10 minutes, ask each group to share the root causes they have identified. Invite other team members to add to the list.
- **Lead discussion of root causes.** Do not try to evaluate or discuss each idea. There does not need to be full agreement on the root causes, only enough discussion that the group can understand the issue more thoroughly. Remember these key facilitation tips:
 - * Ask clarifying questions
 - * Respect everyone's ideas
 - * Refrain from making comments that would minimize a team member's input

Develop potential solutions to assigned issue based on root causes. (20 minutes)

- **Divide the team back into their small groups** and ask team members to quickly consider the root causes identified for their assigned issue on the flip charts and quickly discuss and identify some potential solutions. **[TEP Briefing Slides # 9– Determine the Most Practical Solutions]**
- **Ask team members to record potential solutions** on the flip charts as they are identified.
- **Provide the team with examples of potential solutions.** Refer to the examples in the “Issues, Root Causes and Solutions” chart below.

ISSUES	ROOT CAUSES	SOLUTIONS
Poor communication practices, breakdowns in communication	Lack of regular meetings or discussions as a team to plan work priorities and responsibilities Information passes down from management through email - not everyone has access to email during the day	Meet briefly at beginning of each day to discuss work priorities and clarify team responsibilities Make sure team members are encouraged to give input Management needs to reach out personally to communicate important information



TEP SESSION II - 60 to 90 MINUTES CONTINUED

- **Check in with groups** periodically to make sure they are making progress and provide time checks to ensure maximum use of the allotted time.
- **Ask one person from each group** to report out on their group's ideas for possible solution and ask if there are other additional recommendations from the rest of the team.

Determine the most viable solutions to develop actions around. (10 minutes)

- **Place solution flipcharts** side by side on the wall.
- **Quickly review** the recommended solutions that have been identified, combining or clustering similar issues. **[TEP Briefing Slides # 9– Determine the Most Practical Solutions]**
 - * **Indicate the ideas/solutions** that would be appropriate to address as part of the TEP Operating Principles by noting “OP”.
 - * **Indicate the ideas/solutions** that can be dealt with easily and quickly as a Quick Win – “QW”
- **Select the top three (could be two to four)** recommended solutions for the team to address and take action on.
- Ask the team to vote on their top three preferred solutions by a show of hands. Remind them that the solutions should be actions that can be implemented quickly and have a big impact.
- Indicate the number of votes next to each recommended solution.
- Count the votes and determine the top three (could be two to four) solutions to take action on.

Note: If conducting a 90-minute session (**Option A**) or a two-hour session (**Option C**), take a 5-minute **BREAK** here to allow the facilitator time to write the top solutions identified on a new flip chart page to use for developing the action plan.

If conducting a final 30-minute session (**Option B**). Close this session and agree on a time to come back together for TEP Session III to develop an Action Plan within a week.



Tool 2: Identify Causes of Inefficiencies and Develop Solutions with Your Team

Having guided conversations and planning discussions as a team can be very effective in helping to reduce workload pressures and stress and in enhancing work-life integration. This is a real opportunity to focus on reducing time-wasters that are within your workgroup's control.

Managers and supervisors who invest time in having these types of discussions with their employees find that it increases engagement and empowerment, morale and overall team effectiveness, and reduces wasted time. Refer to Team Effectiveness Tools for further information on how to conduct these discussions.

Use this tool to refer to the following topics you might discuss at different times as part of these guided conversations and planning discussions as well as part of informal regular team meetings:

- **Identify the characteristics of team members' desired work environment.** This is an opportunity for the team to create their vision of success. What would a work environment that enables better work-life integration and team effectiveness look like? For example, less time spent in meetings; ability to take vacations and paid time off; ability to go home at night and on weekends without worrying about work; feeling appreciated, valued and supported; having the ability to say "no" without fearing retribution. Utilize the TEP Operating Principles Template.
- **Establish work priorities and focus on the critical few.** When priorities are unclear, people waste a lot of time spinning their wheels working and reworking things that are not of high value. As a manager/supervisor it is up to you to clarify work priorities for your team, be available to help employees manage multiple priorities and recalibrate as needed.
- **Identify key causes of workload, busy work, or time wasters.** Ask team members to think about some of the inefficient work practices or work processes that the team has control over or can impact. For example: too many meetings, lack of planning, unclear roles and responsibilities, too many requests for status reports, etc.



TEP SESSION II - 60 to 90 MINS CONTINUED

Tool 2: Identify Causes of Inefficiencies and Develop Solutions with Your Team

- **Brainstorm possible solutions and develop an action plan to address them.** Identify simple actions your team can take quickly and easily to increase effectiveness. These actions might include eliminating some meetings and developing meeting guidelines to ensure effectiveness; streamlining paperwork; establishing email protocol; redesigning work processes; and improving communication between departments.
- **Develop a plan for handling unexpected last minute requests and emergencies.** Plan for the unexpected so that you are not caught off guard. Agree upon how to work together to cover last minute requests that might require the effort of many or all team members.
- **Discuss what work-life integration means to team members.** There will likely be a wide variety of life situations and individual priorities within the team, and having an opportunity to share those things with each other brings the team closer together.
- **Encourage a sense of ownership and control.** Even though there are many business and organizational realities that will not change, help people focus on things they can control and change, and encourage them to take ownership of those things.
- **Discuss how to build consideration of personal priorities and responsibilities into team and project planning.** When planning a project, ask team members to identify days they are not available due to personal or other commitments. Take into consideration flexible work options and make sure team members are aware of each other's schedules and availability.
- **Agree about how to avoid interruptions of personal time.** Discuss and agree upon how everyone can be reached, and agree to respect people's time off. For example, some teams agree that it is not necessary to respond to an email after a certain time in the evening or on the weekend unless it is extremely urgent.
- **Remember to offer flexible solutions in an equitable way.** Avoid the perception that you have favorites or that only some reasons are acceptable to offer flexibility.



TEP SESSION III - 30 MINUTES

Use this TEP Session III guide for the last 30 minutes of **Option A** and **Option C** and the last session of **Option B**. Establish an Action Plan that includes addressing the top priority issues and recommended solutions. (25 minutes)

- **Develop an action plan** for addressing each of the three (could be two to four) top issues/ recommended solutions as well as the TEP Operating Principles. [TEP Briefing Slides #10 – Establishing an Action Plan]
 - * Draw an action plan on a flipchart using the following template

Solution	Activities/Tasks	Timeline	Responsibility

- * Review the solutions that were voted to be priorities.
- * Determine activities, responsibility and timeline. If time allows, consider assigning responsibility and timelines for “quick wins” (things that could be implemented quickly and have an impact) that may not be in the top solutions. For solutions that need more thought and discussion, assign someone to take responsibility for exploring them further and agree on a timeline.

Refer back to the team’s Team Effectiveness Operating Principles and any ideas/solutions to major time wasters that were labeled “OP”. Are the Operating Principles complete? If not, assign responsibility for refining and finalizing.

Summarize action plan and agree upon a follow up process and next check in meeting. (5 minutes)

- * **Agree on a process** to monitor progress and results, including assessing progress on the action plan, providing opportunities to address any new issues or inefficiencies, and discussing TEP Operating Principles on a regular basis as part of team/staff meetings.
- * **Thank the team** for their contributions to this process and confirm your commitment to sharing success stories and best practices with leadership and other team leaders/ supervisors.



TEP SESSION III - 30 MINS CONTINUED

Tool 3: Guide Employees in Maximizing High-Value Work and Minimizing/Eliminating Time Wasters

Use these questions to identify opportunities for streamlining a process.

- Can we streamline the process?
- Can we change the sequence of the process?
- How do we actually complete the process?
- Is it possible to do it better?
- Can we use a different method or process?
- Is there better material, equipment or additional information that we could use to improve the process?
- Can we improve the task by changing who completes it?
- Do we need to complete the process according to specific rules?
- Is there training available in all steps of the process?
- Are some employees better than others at the process?
- What skills and knowledge are required?
- Are there other employees that currently do the same process that could share information with you on it?

Use these questions to help you identify critical tasks.

- Why do we do this task? Is it necessary?
- Can we accomplish the same result without this task?



AFTER THE TEP SESSIONS

Conduct follow-up TEP discussions monthly or on a regular basis with your team as part of team/workgroup meetings to reinforce TEP Operating Principles, discuss progress on the action plan and address any new issues or inefficiencies. The goal is to embed and sustain effective ways of working into the team's day-to-day work practices. Refer to the **TEP Follow-Up Discussion Guide** for instructions to facilitate follow-up sessions.

Communicate TEP results, success stories, and best practices to organizational leadership and other team managers/supervisors and encourage their future participation in TEP



Safety & Health Improvement Program

2020 © Copyright OHSU. All Rights Reserved