



Team Roles (Video Transcript)

Working collaboratively is an important competency in health sciences, and effective teamwork requires good team process. This focus on process means that when given a task or activity, it is important to concentrate on how a team arrives about a course of action, as opposed to a task's final outcome. Team roles are what help to develop and sustain this process. Accordingly, in this video, we will describe the various team roles as defined for interprofessional education at the University of Alberta, and how they contribute to the processes that support a team's task.

First we will look at the **Initiator**. He or she can almost be seen as a chairperson, essentially being the leader of the team. The Initiator achieves this task by: setting objectives and goals for meetings; deciding upon plans of action for both inside and outside meetings; and overseeing the overall process such as having all members of the team participate, maintaining a respectful environment, and keeping the team on-task and moving toward the team's goal.

Next, let's talk about the role and the behaviour of the **Recorder**. The Recorder has several jobs. They document the group discussion and keep track of decisions, and they help to clarify and summarize details and keep the meeting on track.

The **Timekeeper** supports the Initiator by keeping track of time for each agenda item and for the meeting overall. They also help the initiator to adjust the agenda and priorities when there isn't enough time to complete a certain task or agenda item. Their overall purpose is to make sure that all the tasks and agenda items are completed for that particular meeting, or that there is agreement on deferring items to another meeting.

Now, the role of **Energizer/Encourager** is not generally thought of, and in practice it's usually not officially assigned, but it is very important. The Energizer/Encourager is the one that pays attention to the process and senses the mood of how the meeting is going. Is there a lot of frustration, is there a lot of misunderstanding? They are the person that makes sure that everybody is included, everybody's ideas are heard. They might say: "We haven't heard your view, John. What are your thoughts?" or "Wow, the energy is really dropping, do we need a quick break?" They use humour, surprise, or other strategies to maintain a positive attitude and keep the spirits of the team up.

The **Advocate**, another crucial role that, in practice, is usually not officially assigned, is the person who helps the team to examine their plan or their thoughts from all angles. They try and make sure that, along with the encourager, everybody's perspective is heard. Not only the people that are at the meeting, but the people outside the meeting. In healthcare, two examples are to take the position of the patient if the patient were not included in the meeting, or to suggest that a member of another profession with different expertise be brought into the conversation. They ensure that the team doesn't come to a decision too quickly, and they remind the team to consider how practical their plans and expectations are.

Technically everyone is a **Participant**, but the official Participant has the option of supporting other team members in their roles. For example, if the Timekeeper is busy discussing an idea and missed the fact that you're done with the time allocated for that particular task, they might speak up instead. So the real job is to monitor and fill the vacant roles.

The role of the **Process Analyst** is to examine how the whole team is functioning. The Participant, if you recall, is looking at individual roles and at how they can assist an individual performing their role; whereas the

Process Analyst is looking at the overall process and provides advocacy for team process such as: Providing feedback to team members either during or after the meeting in order to move the team forward and make sure that they are operating the way they should be operating.

In summary, there are seven roles all with unique responsibilities:

- The Initiator leads and directs the team's progress.
- The Recorder keeps track of discussions and decisions.
- The Timekeeper keeps the team's activities on schedule.
- The Energizer and Encourager maintains a positive atmosphere and ensures all members have their voices heard.
- The Advocate ensures topics and decisions are considered from all different points of view.
- The Participant assists and fills all other roles as necessary.
- And the Process Analyst examines the team's processes and gives feedback to team members.

As you can see, team process skills are an important part of effective teamwork. These skills are rolled into sets of responsibilities or functions that define each team role. In interprofessional education, students take turns carrying out each team role. Sometimes, performing these roles may feel unnatural, forced, or awkward; but there are several reasons to perform team roles in this way. The first is to intentionally practice the functions associated with the team roles; the second is to provide clarity as to who is responsible for each team function, ensuring none of the functions gets missed; and the third is to provide all team members equal opportunity to practice and refine these skills.

In the real world these roles are rarely formalized this way. However, effective teams do perform all of these roles in various forms. By moving beyond your natural skill set and honing these team skills now, you will be able to step in and out of these roles as needed in team situations in your future practice. Ultimately, the role we all perform most frequently in the real world is the role of the participant, as it is the participant who steps in and performs any team function as needed in the moment.

This has been An Introduction to Team Roles. Thank you for watching.

Video: https://youtu.be/-POOs-c_0Z0

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