Team Functional Roles

The roles are described below. On a small team, individual members should double up on some roles; on a larger team, multiple people can be assigned to the Participant role. The Process Analyst should regularly provide feedback to the team on their processes, and ensures the team debriefs in an intentional manner.

Role	Responsibilities
Initiator	❐ Guide the team in setting appropriate objectives and goals ❐ Lead the team in deciding approach and execution strategies ❐ Ensure all members participate and are treated with respect ❐ Oversee information gathering ❐ Ensure that goals take precedence over problems/conflicts ❐ Keep the team on task and on time to meet deadlines ❐ Lead a team debrief at the end of each meeting
Recorder	❐ Clarify ideas to eliminate vagueness and imprecision ❐ Summarize ideas and synthesize team discussion ❐ Clearly document group activities/decisions ❐ Assists initiator in ensuring that meeting remains on task
Timekeeper	❐ Keeps track of time remaining for a particular activity ❐ Assists initiator in ensuring that meeting remains on task ❐ Assists initiator in re-aligning agenda and priorities when there is not sufficient time to complete tasks
Energizer / Encourager	❐ Bring people in who have not contributed to the discussion ❐ Suggest ways to increase sharing of ideas, participation of all ❐ Maintain a positive attitude and ensure that team members are engaged ❐ Energize the team when motivation is low; keep spirits up ❐ Bring out the best in each person by being an encourager ❐ Use humour, change of strategy, or surprise to achieve a positive team environment ❐ If some members are joining the meeting remotely (e.g. via phone or videoconference), ensure all members can hear and be heard
Advocate	❐ Advocates for perspectives that are underrepresented or unheard ❐ Ensure that multiple possibilities are explored ❐ Suggest alternative ideas or opinions (play 'the devil's advocate') ❐ Help the team evaluate the practicality of plans and expectations
Participant	❐ Observes team process and assists any role that requires support ❐ Move between roles as needed ❐ Assist a member in performing an assigned role, as negotiated ❐ Assess where additional team roles are needed and take on that role

Process Analyst	❐ Observe and review team process (e.g. use this table as a checklist)
	❐ Provide feedback on team process issues, including:
	  ❐ Approaches to decision making
	  ❐ Approaches to conflict
	  ❐ Functions of the other team roles
	  ❐ Providing feedback to team members
	❐ Ensure the team debrief covers questions such as:
	  ❐ *What*: What did you observe regarding performance of each assigned role?
	  ❐ *So What*: What was the impact of these actions have on team process? How did gaps in performance impact function? What needs to change?
	  ❐ *Now What*: How will you adapt for next time?

What do I bring to my team today?

Each team member is responsible to bring three things to their team every day:

Personal Contributions	**Professional Contributions**	**Team Functional Role**
such as life experience, talents, and knowledge. This is what you walk in the door with.	such as your scope of practice, clinical knowledge, and practicum experience.	such as the behaviours you use to support team members, move the work forward, and build team cohesion.

Why and how do we assign functional roles?

When a team is meeting or working together, each member takes on a team functional role in addition to working on the task at hand and representing their profession. These roles support and improve how the team works together. In the "real world" these roles are rarely formally assigned, but high-functioning teams do demonstrate all these roles in some way. Practicing them now will ensure your team functions well over time, and help hone your skills so that you can call on them in the future.

Each week, each team member takes on a functional role, and the roles rotate each week. You may wish to use a chart like this to track role assignments.

Date	Initiator	Recorder	Time-keeper	Energizer	Advocate	Process Analyst	Participant	Participant