

Tips and Tools for PEPFAR Teams

Assuring a Smooth Entry: Assimilating New PEPFAR Team Members

PEPFAR country teams welcome new interim and permanent staff on a constant basis. The influx of incoming team members can be a pivotal point for the team. A thoughtful and smooth entry can contribute to the teams' productivity and bring in new ideas, while a rocky entry can ripple across the team in unanticipated and harmful ways. Successful and smooth entries depend on both the team and new member showing openness and respect, as well as a genuine interest in learning about the experiences of the other.

Drawing on the experiences of PEPFAR teams in the field, this article highlights ways teams and individuals have successfully welcomed and integrated new members and remained productive during the transition. It can also aid new team members in preparing their entry strategy.

Making a Smooth Entry : Practical Tips

Focus on getting oriented to the program and team.

When joining a new team, the natural and possibly easier thing to do is to read all the program documents as a way to become more familiar with the program and activities. The more challenging part of entering a new situation is to remain open to and learn about this new experience without automatically applying your previous lessons and successful practices to the new situation. Teams can quickly grow frustrated with new team members who too frequently preface their statements by saying "in my last assignment we did..." While there may well be some relevant lessons to share with the team, it is initially more helpful to take time to get to know new colleagues and way they've been working together. The best strategy is to spend time asking ques-

tions and engaging team members and others outside the USG team to understand the nuances and dimensions of the HIV epidemic and the country's response.

It may seem obvious to some, but both incoming staff and established team members must not be afraid to ask questions of each other in an effort to establish a common understanding of basic opportunities and challenges facing the team. Thoughtful questions help to increase understanding on both sides, and incoming team members can gain valuable insights while demonstrating their own interest and fostering inter-team connections.

Here are some questions to keep in mind as you prepare for your own, or your new team member's successful entry:

- Who are the key people?
- What is the contribution of each partner and stakeholder organization? Who are the champions among them?
- What are the technical and organizational performance challenges?
- Where is coordination in the response working and not working?
- What strategies are in place to achieve sustainable programs and services?

Orientation to the team members is equally important to increasing your understanding of the program. Often the local staff rotate less frequently than expatriate team members, and they consequentially may be more likely to be the ones welcoming new team members. A simple, but often overlooked, first step in the initial entry is for new individuals to learn the names and roles

of all staff members on the team. In fact, a key lesson shared by local staff in one PEPFAR country was that “the first thing a new arrival should do is to take the time to learn the names and roles of local as well as international team members.” In most countries, greeting one by name is a show of respect and communicates that you see them as important and having status. This initial step, this team reflected, makes it easier for local staff to be open in sharing cultural norms and ways to get work done appropriately.

Another successful practice for incoming team members is to schedule one-on-one “meet and greet” sessions with their new colleagues, which will further enable established staff to share important cultural mores and team practices.

Distance adds to the challenge of relationship building and should be factored into planning for a new entry. If a team is not co-located, make a special effort when first joining a team to get out and visit team members in their office, which will communicate a high degree of interest and commitment to getting to know the team members. Often teams that are scattered rely too heavily on email communication, which often spurs miscommunication and interpersonal (and agency) conflicts over perceived tone or slights. In the early stages of assimilating into a new team, try to have more face-to-face conversations or phone calls rather than just email communication. Emails are much better when relationships have already been formed and there is a higher degree of familiarity and trust among the team.

Share and reinforce team practices and norms.

Another level of getting to know the team involves learning about how it is structured and understanding the protocols and norms for working together. Teams have found that discussing and agreeing upon team expectations with a new team member is critical to a smooth entry and their continued productivity. Some PEPFAR teams have taken proactive measures to share the norms they’ve developed and help incoming teams members understand and respect them.

Sample Practices

Here is a sample of practices teams have developed to prepare for welcoming new members:

Communication Agreement

In one country, an interim PEPFAR coordinator prepared for the new coordinator by writing up the team-agreed email protocols and broader communication agreements to share with her incoming colleague. The leadership team in another country developed a guidance document on cross management principles in their PEPFAR program. Local staff in a third country emphasized the importance of understanding and honoring the team norms.

Advice and Feedback Process

Another PEPFAR team, planning for several new interim and permanent team members, agreed on a step-by-step process for offering advice and feedback to the new members. This allowed the established team to productively channel their fears that a new manager would give, but not listen to advice; integrate the input of incoming managers, and share established processes and norms.

Orientation Plan

One PEPFAR team prepared an orientation plan for the incoming Coordinator entitled, *The First 100 Days*, and in it packaged several steps into a team transition workshop – getting to know the team, reviewing portfolio priorities and timeline, sharing expectations for the coordinator role, and reaffirming team norms, protocols and agreements.

As one group of local staff members points out, the frequent rotation of international team members can cause norms to erode quickly – particularly if an expatriate with power and authority is unwilling to try and understand one or more of the team’s established standards. It is therefore important for incoming team members to dem-

onstrate a willingness to honor and practice the team norms before suggesting any new alternatives or changes.

Given the important of shared team norms, another team agreed to make progress checks of the team norms a main agenda item during the first team meeting of every month, at least during the months in which teams navigate through their staffing transitions. By making team norms front and center each month, team members – both new and long-timers alike – will be more conscious about managing their own behaviors, and hopefully more comfortable giving advice and receiving feedback as well.

Example from one Country Team's Norms

Good and positive group dynamics

- Openness. Speaking freely.
- Supportiveness
 - Respect one another by asking for a team member's input.
 - Understand concerns and needs of others.
 - Before reacting negatively, seek clarity. Give benefit of the doubt.
 - Open to giving and receiving feedback
- Positive personal styles
 - Take time to get to know one another
 - Less defensiveness in discussions
 - Create opportunities for networking and interaction (e.g., field trips)

Share Feedback.

Even with good intentions, some team members' transition onto a team run into problems and well meaning new team members may be unaware that they are off to a rocky start. The following examples highlight this situation:

- An American entering her fourth month in a new PEPFAR country had no idea the local staff was shunning her. Her supervisor knew,

but wasn't saying anything, and local staff talked about her behind her back. The only thing she observed was that team members responded to her requests with a lack of energy and follow-through.

- In a different PEPFAR country, the coordinator had a habit of hollering out his office door to request tasks or to ask his staff to step in. The team found their new manager's behavior demeaning. Yet they kept quiet, except with one another.

Country teams have a collective role and responsibility to help bring about the smooth entry of a new team member. There is a growing body of literature on building emotional intelligence in teams: at the core is the concept that individuals with less awareness about their behavior and its impact on others can gain this awareness, like a gift, from their teammates. Giving feedback is something that is easy to agree to and sometimes hard to do, especially in a multi-cultural work situation. Acknowledging this difficulty, one PEPFAR team developed a process for giving feedback whether solicited or not to new team members. The first step involved sharing the goal for a smooth entry and the norm for giving unsolicited feedback and advice. The team was ready to explain how they worked together and the agreements they had made. They also agreed that managers, as part of their mentoring of the new team member, would have confidential one-on-ones with team members to find out how a new person's transition was going. If anyone felt uncomfortable delivering feedback, the team member had permission to strategize with her/his supervisor, and they together would decide on a course of action.

Without some helpful counsel, new team members may never fully understand the impact of their behaviors on team members or the team as a whole. Yet with feedback, openness and trust – again, fostered by team norms -- these members

can become successful team contributors. In fact, the combination of feedback and team norms can be a powerful tool in enabling the entire PEPFAR country team to manage collectively the smooth entry of a new team member.

Final Thoughts

Incoming personnel and existing country team members have a collective responsibility to bring about the smooth entry of individual team members. By articulating and respecting team norms, and creating time and space for open and honest dialogue about how well the team is working together, teams can build a foundation for smooth entries. New personnel can become quickly ori-

ented to a country's program, and new teammates can help their incoming colleagues understand group expectations and contribute toward achieving established work plans.

Facilitate discussions within your own country team about smooth and rocky entry characteristics and behaviors, and encourage team members to give new team members feedback – positive feedback when seeing smooth transition behaviors, and negative feedback when seeing rocky transition behaviors. By doing so, you will become an active participant in increasing your impact and improving the power of your team.

Recommended Reading

Harvard Business Review, *Building the Emotional Intelligence of Groups*. March 2001.

Smooth Entry Score Card

If you are the new person joining a PEPFAR team, the tool below may help you gauge how effectively you demonstrate the behaviors and practices that have been shown to contribute to a smooth entry. Use the following scale and indicate how frequently you see yourself doing the following when you enter a new team or office:

Characteristics and Behaviors	1 = Never 2 = Not Often 3 = Some-times 4 = Often 5 = Always
1. I quickly feel comfortable describing the main aspects of my country's PEPFAR program, and know the primary roles and responsibilities of my new colleagues.	1 2 3 4 5
2. Within days I can greet most team members by name – local and international.	1 2 3 4 5
3. I have a defined entry strategy to clarify work and team expectations, and have discussed this strategy with my supervisor and/or new team members.	1 2 3 4 5
4. I am keen to listen and learn by asking questions.	1 2 3 4 5
5. I solicit advice and feedback about cultural and team norms from local and international staff members.	1 2 3 4 5
6. I make a point to observe and learn how things get done in the team and how to be appropriate; for example, I know how agency heads and staff tend to communicate and what kinds of decisions are made by what sub-groups within my new team.	1 2 3 4 5
7. I meet one-on-one with team members early in my on-boarding process to get to know them as individuals and understand their roles and contributions.	1 2 3 4 5
8. I strive to understand needs and interests of the U.S. agencies, and the culture and principles of their organizations. For example, I am on my way to knowing the basic budgeting principles and agency goals of my colleagues' agencies.	1 2 3 4 5
9. I create opportunities to network and interact across the team (e.g., joint field trips).	1 2 3 4 5
10. I appreciate and explicitly acknowledge support from others.	1 2 3 4 5
Total Score <input style="width: 50px; height: 20px;" type="text"/>	

Assess Your Smooth Entry

What your total score indicates:

10-25 points – You have experience with the downward rocky slope, and should consider becoming more intentional in your entry strategy. Open up and ask teammates for help before it is too late: smooth entry skills are something that can be learned, and could make a significant improvement in your impact.

26-39 points – You're teetering at the rim of the rocky slope, yes? Get started right next time: ask for feedback sooner so you can hit 'reset' before you are in danger.

40-50 points – Keep on sailing! You have excellent entry skills. Of course, you should always look for ways to become more effective.