

# build better teams: an assessment tool

a tool by **QUAKE  
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# introduction

This is a tool geared towards ensuring that folks who are working in this field are using their resources appropriately to avoid burnout. Employee care for those who provide services for Equity Ottawa partners can be difficult to navigate because they can involve precarious situations. It's important to make sure that people who are providing the service to the community are actually fulfilling their roles in a way that is sustainable to themselves, to your organization and community.

This job assessment tool is built for the purpose of ensuring that service delivery jobs are well built out. This means creating clarity for employees about what falls within their role, avoiding reading between the lines, and ensuring that employees and employers are working together towards the same goal. Job clarity creates less space for ambiguity and inequity to foster, because there is more accountability and transparency built into the service planning and delivery lifecycle from an organizational perspective.

The service planning and delivery cycle comprises the following phases:

Phase 1: Identify the problem

Phase 2: Needs articulated

Phase 3: Program + service + offering developed

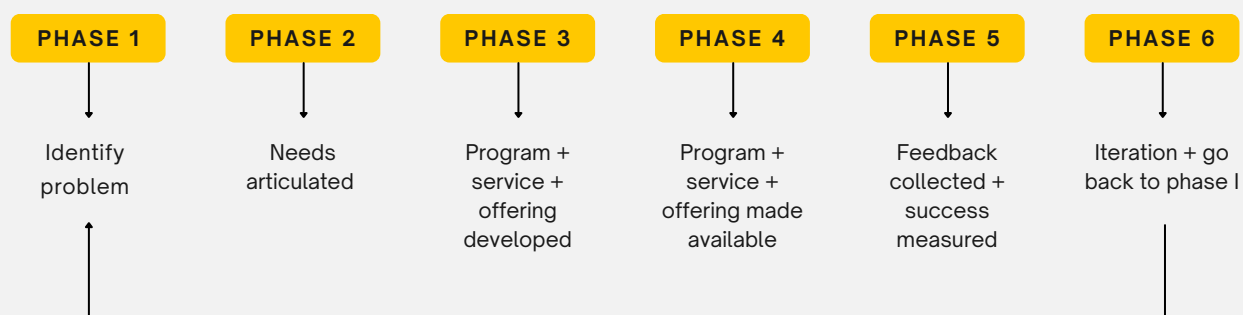
Phase 4: Program + service + offering made available

Phase 5: Feedback collected + success measured

Phase 6: Iteration + go back to Phase 1

This tool is geared towards **Phase 2: Needs articulated** and **Phase 3: Program + service + offering developed**.

## service planning and delivery lifecycle



# why is this important?

When you join a project, you should have a clearly defined role to ensure everyone is working towards a common goal in a cohesive way. From an equity point of view, frontline staff in social good organizations disproportionately often come from marginalized groups and also face issues such as lack of care and support and a lack of training or time. Oftentimes, these positions are also subjected to expectations of overtime work.

Blurry boundaries and insufficient thinking before a project starts can cause a project to be unsuccessful because it is foundationally insecure. Your team members are critical for ensuring successful and sustainable service planning and delivery and as such, it is important to lay the groundwork for equity internally to ensure it can be practiced externally.

# how to use this tool?

This tool is for project leaders or HR professionals to use to ensure they are cultivating an equitable environment for service delivery sustainability. It can also be used as a tool that is shared across teams to ensure there is transparency when it comes to project decisions.

The table is divided into three columns: category, considerations, and the equity lens:

**Cluster:** a group of considerations that are similar or that should be considered together

**Checklist:** the questions you should ask to ensure that you are considering equity as you make decisions

**Equity lens:** a brief explanation of why this cluster of questions is important for embedding equity

By answering these questions, you are building the foundations for sustainable and equitable service planning and delivery. This is no small feat – it is vital for each phase of the lifecycle and can make a world of difference to the quality of service planning and delivery.

Cluster	Checklist	Equity Lens
<p><b>Roles and Responsibilities</b></p> <p><i>Building a thorough understanding of roles and responsibilities within a team leads to clarity within the project.</i></p>	<p>As you are assessing roles and responsibilities required for the service planning and delivery, consider the following:</p> <ul style="list-style-type: none"> <li>• What resources do you require for this project to be a success?</li> <li>• How many people do you require? Are you considering possible absences?</li> <li>• Do you need people to be on-call?</li> <li>• Is this realistic given your budget?</li> <li>• If you are pulling people internally to do this work, do they have time based on their schedules currently?</li> <li>• Do the tasks fit under their current job descriptions?</li> </ul>	<p>Incongruence between the job description and actual job can disadvantage people if the expectations of the job require them to shift their schedules outside of work.</p> <p>Most likely to affect parents, guardians and other caretakers and people who work contract and/or part time.</p>

<b>Cluster</b>	<b>Checklist</b>	<b>Equity Lens</b>
<p><b>Communication</b></p> <p><i>Oftentimes, communication is very lightly considered, if even at all, when building project teams but many problems arise when there are barriers to communication.</i></p>	<p>As you are building out your team, discuss what communication will look like within the team. Consider the following:</p> <ul style="list-style-type: none"> <li>• How will you communicate tasks to the whole team?</li> <li>• How are you ensuring this is accessible? For example, is it through email only, are you considering when people will view their emails or if they have reliable internet access?</li> <li>• What questions do team members need answers to before implementing tasks?</li> <li>• How will you ensure that everyone is communicating at the right time and effectively? For instance, if there are folks on call, is it clear for all team members how to communicate effectively?</li> </ul>	<p>Unclear communication can lead to mishaps in planning and delivery.</p> <p>Most likely to affect women and gender minorities, racial minorities, immigrants, and folks who do not speak the dominant organizational language.</p>
<p><b>Training and skills</b></p> <p><i>Knowing what kind of training and skills are required for a role is critical for understanding what kind of resources you need to invest and if you need to have any contingency plans to ensure overlap in place. This also helps ensure that you are recruiting people for your project that actually DO have the skills – that there is less ad hoc work being done.</i></p>	<p>When building out your team, think about the skills required and if there is any training required. Considering the following:</p> <ul style="list-style-type: none"> <li>• What prior education or training are necessary to do the job? Are there lived experience equivalents?</li> <li>• Does anyone need training before starting?</li> <li>• Is there any cross-training that can be done? Does it fit into the schedule?</li> <li>• What are transferable skills?</li> <li>• What needs targeted training and/or upskilling? Is there time built in for this?</li> <li>• Do you need everyone to be trained for every skill required? For example, if two out of four people on the team are bilingual French/English, do you still require everyone to be bilingual French/English?</li> <li>• Is there overlap to ensure that if one person who has training is absent, there is another person who can take on the role to deliver the service or program?</li> </ul>	<p>Assuming people are trained for the role without ensuring this is the case can lead to overtime work and undue stress to keep up.</p> <p>Most likely to affect immigrants, women, racial minorities.</p>

Cluster	Checklist	Equity Lens
<p><b>Support and care</b></p> <p><i>This is really important to plan for, especially when services and programs deal with difficult topics.</i></p>	<p>As you plan this project, think about what kind of support and care team members may need. Consider the following:</p> <ul style="list-style-type: none"> <li>• What kind of care mechanisms for employees can be embedded into this project?</li> <li>• How will you check-in with employees to make sure they have the tools they need to succeed at this job sustainably?</li> <li>• What kind of stressors do you expect in each role?</li> <li>• What can help mitigate any kind of emotional distress or exhaustion? And what can help prevent these occurrences?</li> </ul>	<p>Lack of care can lead to burnout and a lack of trust in the organization.</p> <p>Most likely to affect frontline workers and members of marginalized groups.</p>

The table above presents some big questions! It's okay not to have all the answers right away, some of these questions require time and research and a lot of the answers might fall out of your control. For any questions that do not have yet answers, brainstorm ways in which they can be acquired – some might present quicker interventions than others. For instance, some questions may prompt you to be creative about how respond to them, while others may prompt you to intentional ask frontline staff members from other programs or services to identify any existing gaps or challenges.





# now what?

This tool is meant to be an iterative device – used in Phase 2, as you identify the needs articulated and in Phase 3, as you develop the service or program. It can also help make decisions at the end of the service planning and delivery lifecycle, in Phase 6, so that you can iterate on internal organization to better external offerings. Ultimately, the goal is to have each question answered to ensure an equitable and justice-centred approach to service planning and delivery which requires careful consideration and intentionality built into the foundation of the service lifecycle.

The checklist is a tool to help facilitate an understanding of what makes an equitable team during the entire service planning and delivery lifecycle, but also how to make sure it can be sustainable. Burnout, exhaustion, lack of training and support, and role ambiguity all have a negative impact on employees and leave room for inequity to grow. Unfortunately, they frequently also work together to increase their impacts on folks from marginalized groups. With this checklist, you should be able to find out where some of those gaps exist and how you might be able to be creative in filling them.