

# Putting Together an Instructional Development Team

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Often in instructional development, we are faced with the decision to organize a production team based upon either a team approach or an individual approach. With increasing demands for the services of instructional development there exists more often than not a need to organize a team of specialists together to help solve instructional problems. In their attempt to solve instructional problems, however, they create their own problems usually associated with the organization and proper functioning of a team. This paper will discuss five factors usually associated with the concept of project management which when considered and properly prepared for will facilitate the creation and operation of an effective production team. We will examine the necessity of (1) analyzing available internal and external resources, (2) defining roles of specialization and generalization, (3) establishing communication networks, (4) determining rules of team operation, and (5) evaluating reward structures within the team.

1. *Analyze available internal and external resources.* Internal resources are those which are available within the team. You most likely will have those who are specialists in evaluation, instructional research, facilities design, instructional design, and so on. External facilities might include specialized production centers such as a motion picture department, instructional T.V., facilities planning, equipment services, and so on. It will be necessary initially to list these resources and describe the contribution each can make with respect to solving instructional problems. Much of this information will also have impact upon the other factors which are described in this paper.

2. *Define roles of production team members.* Included within this phase is

typically a description of particular tasks assigned to team personnel, their functions in relationship to each other, and procedures which will govern the use of facilities and personnel all controlled by the use of an integrative set of forms such that when completed will assist with the smooth operation of the team. The definition of each member's role should include their rights, responsibilities, internal and external powers, and their association with the formal and informal communications channels described in the next phase. For example, there typically exists a director of a development service, several project directors, and a variety of production specialists. You may want to delineate their job descriptions as follows:

a. *Director, Development Services.*

(1) Assists in the initiation of development projects in collaboration with his supervisor. He notifies his supervisor of any possible development projects and coordinates with that office in initial presentations with prospective clients. (2) Coordinates the assignment of project directors to specific development projects and is the final reviewer for all documents and products which are delivered to clients. (3) Reviews milestones for the completion of all projects by interviewing project directors periodically to determine the status of reports and/or products associated with each project. (4) Coordinates the project functions with prototype production. (5) Prepares a quarterly report on all development projects for submission to his superiors. (6) Coordinates a peer review process. (7) Mediates when conflicts occur with schedules, services, project director/client relations, and so on.

b. *Project Director.* (1) Plans development functions (including evaluation) for projects under their supervision. (2) Submits required reports and production to Director of Development Services for peer review. (3) Follows through with all action items indicated in the project plan. (4) Maintains quality control over prod-

ucts and processes developed within each project under their direction. (5) Meets periodically with the director of Development Services for a project review. (6) Generates first and final drafts of all required project documents. (7) Acts as peer reviewer upon request from the director of Development Services.†

c. *Production Specialist.* (1) Works with project directors in planning all prototype production for all development projects. (2) Coordinates the work efforts of freelancers, full-time personnel, graduate assistants, and undergraduate part-time employees. (3) Coordinates with typing pool. (4) Clears with the director of Development Services all personnel requests for freelancers, graduate assistants, and so on, as required for prototype production. (5) Coordinates with director of Development Services and the project director in charge of specific projects to insure completion date commitments to clients. (6) Coordinates with director of Development Services to notify him of any problems or production deadline slips as early as possible within the development process. (7) Coordinates required services from on-campus agencies such as photo graphics, audio, T.V., and the press. (8) Works with project directors in determining needs for message design.

Within the context of these job descriptions the functions and tasks to be accomplished by each will emerge.

3. *Establish communication networks.* Formal channels of communications are usually reflected within work flowcharts. For example, if we are considering the three positions outlined above, they may be described formally as shown in Figure 1. Formal channels and the interrelationships of each team member need to be clearly defined and established.

The development of informal networks requires positioning team members in work settings that allow them to work together more effectively. As you improve upon the informal channels you, as a coordinator of project teams, enhance the formal channels as well

and, therefore, build into the system a more effective working unit. We must remember to continually consider questions of motivation and satisfaction within the tasks themselves which are required of team members as well as the working environment created by those tasks and by managers who are in control of particular environmental situations.

4. *Determine a set of regulatory rules to govern the team.* Rules and regulations concerning the proper functioning of a production team usually require a set of policies and procedures which describe the formal communication networks with respect to job descriptions, the instructional development model to be followed when possible, reporting procedures, and necessary regulatory forms which will assist in carrying out all of the functions mentioned in this paper. A policy and procedures manual could be developed to include the following components:

- a. A statement of team mission describing audiences to be served and the types of consultation and development services which are performed.
- b. Personnel job descriptions outlining the formal channels of communications and responsibilities.
- c. Project reporting procedures which might include (1) an initiation

form, (2) a design document, and (3) a final report. Examples of these forms are included in Figures 2 and 3.

d. Recordkeeping responsibilities such as the Budget and Timeline form are shown in Figure 4.

e. Definition of project load for instructional developers. Here is a set of variables that affects content, subject matter expert relations, and other environmental factors could be given numerical weighting to use in the assignment of projects to project directors and other team members.

5. *Evaluating and maintaining the production team.* Once all of these efforts have been completed, concern needs to be given to continuous questions of motivation, satisfaction, and maximizing the potentials of both human and physical resources. As an instructional developer attempts to integrate these apparent independent units into a properly functioning team, problems are often encountered. Some team members become discontent because they are not given the exact role they prefer. Some are not completely satisfied with their status and the distribution of rewards, while others might complain about being outside the mainstream of policymaking and channels of communications which do not favor them as such. Haiman (1957) describes

this as a cycle of circumstances caused by the division of labor we have just described. These become symptoms a team leader must watch for as he evaluates his production team. This is Haiman's list:

- a. A division of labor leads to specialization.
- b. Some specialties are more important to a group than others and a higher value is therefore placed upon them.
- c. Rewards and prestige are granted in accordance with the value of the specialty and enhance any qualities of wealth and influence that are developed.
- d. Specialization also creates a need for coordination and the coordinator must be given power and authority, thus a hierarchy is created.
- e. Differences of rank erect barriers to communication and the more sharply defined these barriers become the greater is the interference with feelings of comradeship esprit de corps.

The implication for the development team leader is to (1) allow the team members to function within their preferred roles, (2) review periodically with the team members the importance of their contribution and (3) create a communication network which will allow

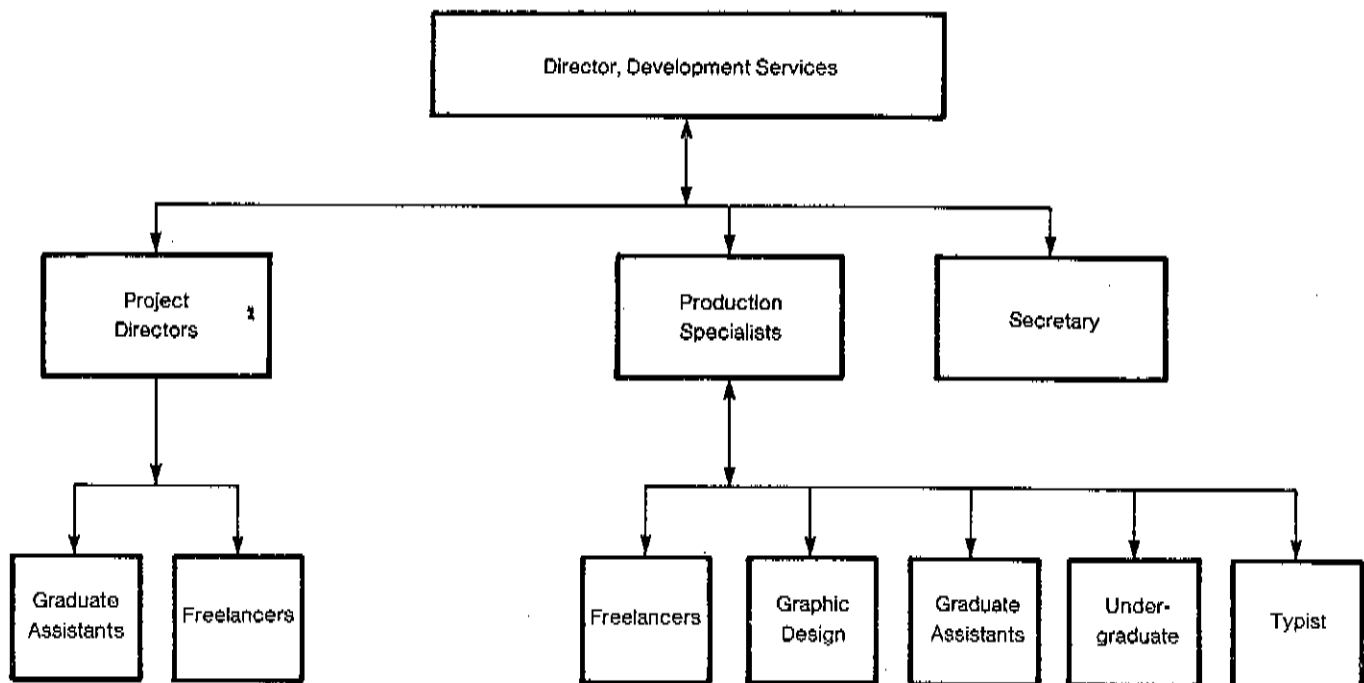


Figure 1. Relationship of team members.

PROJECT INITIATION

GENERAL COURSE OR ENVIRONMENTAL INFORMATION

College: \_\_\_\_\_ Department: \_\_\_\_\_

1. Proposed Project Title: \_\_\_\_\_
2. Person(s) who would be involved in developing the project and what will be their contributions.
3. What is the instructional need?
4. What evidence is there that this need exists?
5. Desired project initiation date: \_\_\_\_\_
6. Project implementation date: \_\_\_\_\_
7. Catalog description of the course (if applicable):
8. Usual teachers of this course (or who will use this product):
9. Schedule for offering course:
10. Anticipated enrollment:  
Fall \_\_\_\_\_ Winter \_\_\_\_\_ Spring \_\_\_\_\_ Summer \_\_\_\_\_  
Home Study (if applicable) \_\_\_\_\_
11. Number of sections each semester: \_\_\_\_\_
12. Average size of sections: \_\_\_\_\_
13. Course prerequisites:
14. Courses that usually follow this course:
15. Titles of texts, workbooks, and lab manuals currently used:
16. Unique facilities required:
17. Describe the audience who will be using the materials.

COMPLETED PROJECT DESCRIPTION

18. What instructional materials and methods are expected?
19. What is the anticipated extent, length, etc. of each of the above mediums?

ADDITIONAL INFORMATION

20. Can materials developed for this project be used in other courses taught at this University?
21. Will the material developed be usable outside BYU (other schools, industry, military, etc.)?
22. Describe the extent to which present content is available or how it may be obtained and how easily.

PROPOSED BUDGET

McKay Institute Staff: \_\_\_\_\_

Released time required of faculty: \_\_\_\_\_

Materials and Supplies: \_\_\_\_\_

Travel: \_\_\_\_\_

TOTAL \_\_\_\_\_

Figure 2. Sample Project initiation form.

## THE DESIGN DOCUMENT

### *Product Description*

A description of potential products indicating quantities, scope, and anything unique for use as feedback, clarification, etc.

### *Materials Search Information*

What has been done in other areas within the University, or any other school, publishing house, etc. in this content and design area? Project directors will meet with Information Science personnel within the Library and subject matter experts to make sure that resources such as TAPS, ERIC, Learning Directory, etc. have been accessed.

### *Facilities Analysis*

A description of rooms, LRC capabilities, labs, both as they exist and as they can be modified to meet the needs of the proposed project. Any implementation concerns should be voiced in this section.

### *Content Plan*

This includes scope, sequence, and level of difficulty concerns at least at the unit and lesson levels. Since content usually expands when we begin producing instruction, firm agreements need to be made at this point with the understanding that a future expansion from this outline means a required increase in appropriated funds.

### *System Analysis*

A simulated "walk-through" of all materials, equipment, space, and people as they interact within the proposed "system" of instruction. Clarification should be given to:

- Learner roles and responsibilities
- Teaching roles and responsibilities
- Message design considerations
- Evaluation plans for the student, products, and the system as a whole. (This is also to be discussed separately in the next section.)

### *Evaluation Plan*

- (1) Student Evaluation. Discuss how objectives will be tested, what types of questioning will be used, reporting procedures via Testing Services, etc.
- (2) Product Evaluation. Tell how the components of instruction such as lectures, syllabi, A/V presentations, etc. will be judged and evaluations reported.
- (3) System Evaluation. Explain formative and summative evaluation, the system for reporting such information, to whom it will be sent, and possible decisions which might be possible.

### *Prototype*

A rough sketch of all components of one unit of instruction mainly to:

- (1) Provide an example of all of the 5 items mentioned above.
- (2) Make future budget predictions for prototype production.

(Finished packaging estimates are not possible until prototype production has been revised after evaluation data has been reported.)

### *Proposed Budget*

A budget for prototype production as well as firm report of past expenditures..

### *Author Agreements and Client Contract*

Expectation of the department, the client, and anyone else participating in the project are agreed to in writing. Indications are clearly given which will make it possible for everyone involved to determine when the project has been completed and terms of the contracts have been satisfied.

Figure 3. Sample design document.

all team members to be properly informed concerning production matters. These three procedures will help alleviate some of Haiman's concerns.

Organizing according to the five major considerations given in this paper takes advantage of both the team approach and the individual approach to instructional development. The advantages from the team concept are that decisions become truly joint decisions between team members because a variety of sources for input are sought by decisionmakers. An advantage from the individual approach is that the project director becomes more responsible for producing documentation, outlining milestones, designing instruction budgets, and so on, yet, he is also given the responsibility to follow through and implement these plans. However, he is consulting other team members along the way and so is giving strength not only to these documents and plan, but also to feelings of team membership and importance by all team members. Working this way more alternatives can be generated, conflicts can be managed, synthesis as well as analysis can be emphasized, and decisions can be scrutinized and evaluated much more systematically and clearly.

**Reference**

Haiman, F. S. The specialization of roles and functions in a group. *The Quarterly Journal of Speech*, 1957, 43, 165-167.

\_\_\_\_\_ Revision

**PROJECT BUDGETING  
AND MAJOR TIMELINES**

Project \_\_\_\_\_ Date \_\_\_\_\_

Director \_\_\_\_\_ Planned Start Date \_\_\_\_\_

Project No. \_\_\_\_\_ Planned End Date \_\_\_\_\_

Account No. \_\_\_\_\_ Bill: Monthly

Billing Address \_\_\_\_\_ Phase Completion

\_\_\_\_\_ Project Completion

DESCRIPTION	Fiscal Yr						TOTAL BUDGET
	Start Date						
	End Date						
	ACTIVITY	INITIATION	DESIGN	WRITING	PRODUCTION	EVALUATION	
Personnel Costs							
Salaries							
Consultant							
Claims							
Other Personnel							
Travel & Trans.							
Postage & Shipping							
Rent, Comm., & Util.							
Facility Rent							
Equip. Rent							
Telephone & Telegraph							
Utilities							
Office Supplies							
In-House Prod. Supplies							
Production							
Printing							
Photography							
Graphics							
Audio							
Other							
<b>TOTAL DIRECT COSTS</b>							
<b>TOTAL INDIRECT COSTS</b>							
<b>TOTAL COSTS</b>							

Figure 4. Sample budget and timeline form.