USING ON-FARM RESOURCE TEAMS

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Today's Session

- Why a team and what does it "look" like?
- The basics of team management
 - Common goals
 - Good facilitator and team members
 - Use of data and continual improvement
- Getting started with your team
 - Stages of development
 - First meetings, making progress
 - Ending the team
- Questions and Wrap Up.

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Why use a Team?

- Team can help to. . .
 - Improve dairy profitability
 - Improve communication and work together
 - Correct a specific problem low milk production, poor reproduction, low cash flow, others.
 - Plan for a significant change herd expansion, management succession, etc.
 - Make a good business better.



Deciding to use a team.

- Why is the Team Needed?
 - Profit Team Long term business focus
 - Target Team Short term issue focus
 - Succession Planning team Transition dairy

- ALL team members take an index card.
- Think about WHY this team is needed.

No "I" in Team

- Team members work together.
- Team members work with information.
- Team members work with trust and honesty.

- Good teams take time to mature.
- Changing team members, delays the process.
- Teams are essential management tools.

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Selecting Team Members

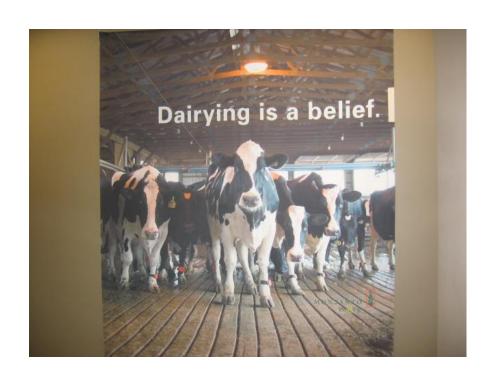
- Has an interest in being on a team
- Willing to listen and learn
- Willing to put "own" interests second to team
- Committed to attending meetings
- Usually, some area of technical expertise

Good Teams Have

- 4-10 core team members, typically, some larger
- Regular, scheduled meetings
 - 1 to 1.5 hours in length --- NO LONGER!!
- Written, shared agenda
- Structured format for operation
- Focused, productive discussion
- Systems for monitoring progress/performance

Good Teams Can

Accomplish much more together than separately.



Basics of Team Management Setting Goals

Setting Team Goals

- All teams need to have a shared vision or common purpose.
- Write down and gain agreement on 2-4 shorter term (first two months) and 2-4 longer term(6 months to 3 years) goals.
- Don't set too many goals
 - It is overwhelming.
- Set "stretch" goals that challenge a bit.

SMART and **DRIVE** Goals

- **S**pecific
- Measurable
- Attainable
- Result oriented
- Time bounded

 Attain herd pregnancy rate of "X" % by "Y" date.

- Directional
- Reasonable
- Inspirational
- **V**isible
- **E**ventual

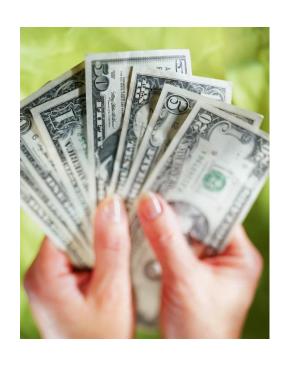
Improve reproduction in herd

Basics of Team Management Good Facilitation

Teams are a major investment for any organization. Facilitation is needed to ensure the best use of that investment.







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Choosing a Good Facilitator

- Someone who can guide the team
 - Both the <u>People</u> and the <u>Process</u>
- Someone who can be organized
- Someone who is a good communicator
- Someone who is able to change "hats"
 - Technical specialist vs. facilitator
 - Asks tough questions, summarize data, manage time
- Remember: ALL team members are responsible for outcomes of the team.

A Facilitator is...

- One who contributes structure and process to interactions so groups are able to function effectively and make high-quality decisions.
- A helper and enabler whose goal is to support others as they achieve exceptional performance.

From: Bens, I. (1999). Facilitation at a Glance.

Who Should Facilitate?

- Someone who is a . . .
 - Good communicator
 - Supporter of teams
 - Good listener
 - Good organizer



Who Should Facilitate?

- Someone who . . .
 - Can help to establish ground rules
 - Includes everyone in process
 - Understands problem solving process



Facilitator Duties: During the Meeting

- Focus the team on increased:
 Productivity, profitability, and satisfaction
- Oversee Profit Team process
 Data analyses, SWOT analyses, goal setting, action planning, and monitoring
- Ask probing questions
- Raise issues
- Foster trusting atmosphere
- Involve everyone in the discussion



Facilitator Duties: During the Meeting

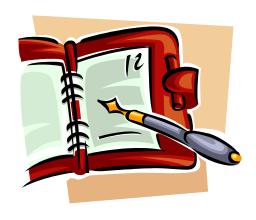
- Summarize discussion
- Help others to listen
- Implement ground rules
- Monitor agenda and progress
- Assign responsibility for action items
- Celebrate successes

Facilitator Duties: Outside the Meeting

- Formalize ground rules
- Set agenda with the owner
- Design a system of tracking critical data
- Design a system of communication
 - Minutes, notes, phone calls, action plans,
 progress reports with the team and others

Facilitator Duties: Outside the Meeting (cont'd)

- Write action plans which: determine tasks, spread workload, set deadlines
- Learn more about the team process
- Suggest methods to improve team outcomes



Being a Facilitator

Is about leading a problem solving process that uses people's time more efficiently.. And arrives at better solutions



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Summary

- Facilitators play key role in Teams.
 - Facilitator assists producer in guiding the team.
 - Does not need to have an interest in the dairy
 - Additional time and effort is required.
 - Facilitator tools are available on the website.

Summary, con't

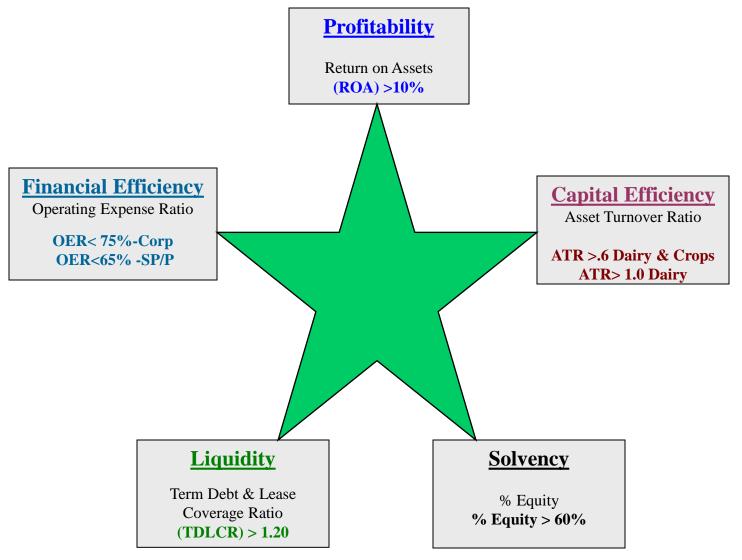
- Facilitation is critical to effective group process
- Facilitators need to learn the core practices and expand their toolboxes
- Good facilitators help team succeed, BUT the final outcome of the team is everyone's responsibility.

Questions?



Basics of Team Management Using data, monitoring progress

Key financial benchmarks



Source: Hilty and Tozer, 2010.

Profitability Factors Profitability - ROA Operations Efficiency Capital Efficiency Operating Expense Ratio **Asset Turnover Ratio** (OER) (ATR) Return to Unpaid Family Labor & Owner Labor and Management

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Monitoring Data for the Team

Key data for goals

Trends for the operation

Monthly monitor

DHIA, financial data

Key industry benchmarks

Using the "right" information

- What factors are critical to success?
 - Milk Volume
 - Milk per cow per day
 - DIM
 - Repro Performance
 - Udder Health SCC
 - Cow numbers
 - Cull Rate
 - Replacement performance
 - Repro Performance

Monitoring information

- Milk Production Daily
- Feeding data Daily??
 - DMI, FE, IOFC
- SCC / Milk Quality Indicators Dairy tests
- PG rate 21 days
- Cull Rate monthly / annually
- Cash Flow
- Break Even cost of production

Monitoring Tool



Monthly Monitor

 Available on website or through Dairy Extension office at:

1-888-373-7232

III. Targets for Teams

Monitoring
the right
information
helps detect
and prevent
bottlenecks







Production Systems Are Pipelines

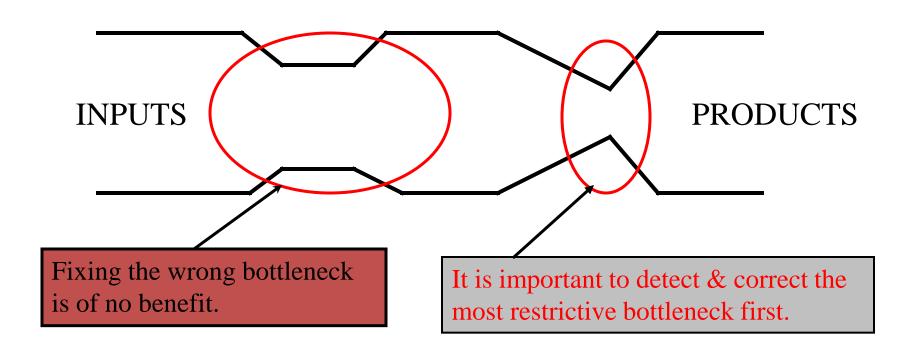
INPUTS PRODUCTS

Source: B. Hilty



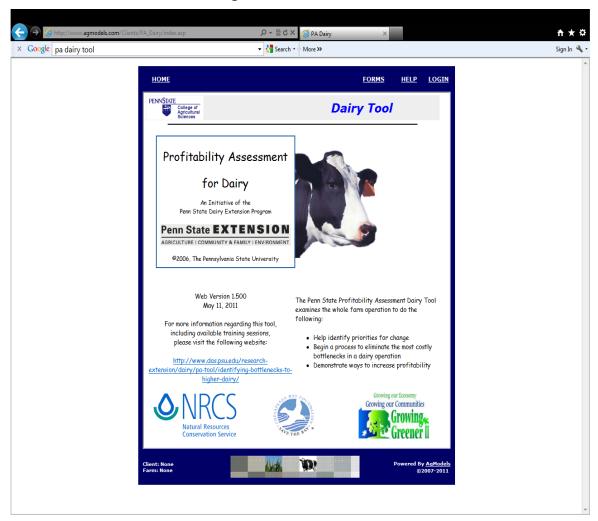


A restriction in the product pipeline



Source: B. Hilty

PA Dairy Tool from Penn State



Contact the Dairy
Extension
Office toll free at:

1-888-373-7232





 "There are no problems we cannot solve together, and very few that we can solve by ourselves."
 --Lyndon Baines Johnson

Getting Started with your Team

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Build your framework

- Choose core team and facilitator
 - May need temporary team members
 - May need additional outside expertise
- Establish expectations
 - Both within and outside the team
- Establish ground rules
- Set GOALS
- Set meeting dates/times

Analyze the Dairy Operation

- Gather Information
 - Profit Team Data
 - Production information DHIA (1 yr), on farm records
 - Financial information balance sheet, income statement
 - SWOT Strengths, Weaknesses, Opportunities, Threats
 - Target Team Data
 - Current and historic data for issue at hand
 - Financial, facility, other limitations
 - Succession Planning Team
 - Production and Financial data
 - Projections, expectations, future needs
 - Various experts (on team or available)

Organize the first team meeting

- On-farm
 - Walk through and review data
 - Analyze information, determine what else is needed.
 - Set goals, ground rules, timelines.
 - Be clear about expectations!

First On-farm Team Meeting

- 1. Allow at least 90 minutes
- 2. Walk through farm operation at beginning
- 3. Evaluate data, trends, share thoughts
- 4. Identify strengths and areas for improvement
- 5. Ask producer to share expectations
- 6. Develop ground rules, communication, expectations, questions.
- Assign roles to team members.
- 8. Begin to develop goals and monitoring systems
- 9. Identify "key items" that need to be worked on by next meeting.
- 10. Set meeting dates for next 6-12 months.

Stages of Teams Development

- 1. <u>Forming</u> Anticipation, commitment, positive feelings
- 2. <u>Storming</u> Disagreement, uncertainty, negative feelings
- 3. <u>Norming</u> Some level of accomplishment,, positive feelings sometimes stop here.
- 4. <u>Performing</u> Positive challenge, learn, grow, achieve.
- 5. End When team is no longer needed.

Storm to Norm to Perform

Lack of progress ---WHY???

- ➤ Too much info overwhelming
 - > Refocus, prioritize, accomplish, celebrate.
- Dragging our feet (accountability)
 - ➤ Clarity and consequences.
- Think we know, but . . .
 - ➤ Use outside experts, review data, reset goals.
- > Dairy producer won't change.
 - Discuss. Direct. Disband team.

Keeping the Pace

- Continue to celebrate successes
- Seek new challenges to incorporate
- Move from more "tactical" issues to more "strategic" issues as appropriate
- Refine communication
 - Can meetings be shorter?
 - Can meetings be less frequent?

Ending the team

- Reasons to disband a team:
 - Purpose completed (no new purpose).
 - Team is not functioning (and can't be fixed).
 - Team members no longer committed.
 - Wrong time for dairy producer.
 - New team needs to be formed
 - Different issues
 - New members

Questions?

