Distributed expertise staffing matrix

A protocol and tool for staffing team-based models

This protocol helps educators make strategic decisions around how to best leverage the distributed expertise of team members. It can also help to identify other educators who may need to join the team and in what capacities.

Time required:
One hour for a team of 4–8 educators

Materials required:
A quiet space and timer

Getting organized ⏰ 10 minutes

1. Identify roles

Identify a facilitator who will move the team through the protocol and a recorder who will take notes.

2. Create your team's matrix

The recorder should create a copy of the distributed expertise staffing matrix (linked at right) and share the link with the team.

Create your own copy

3. Preview the rest of this document and your copy of the GoogleSheet

Team members should preview the full protocol outlined in this document. Then, from their own devices, they should explore the spreadsheet created and shared by the recorder (the spreadsheet contains both the example distributed expertise staffing matrices and the blank template).

4. Get ready

All team members should navigate to the "Template" tab of the spreadsheet (or the recorder might screenshare to project the document). This is where you will complete the distributed expertise matrix for your team.

Defining categories, skills and knowledge ⏰ 20 minutes

💻 Before moving forward make sure to follow step 2.

5. Define your categories

Consider the suggested categories listed in column A. As a team, discuss:
- Given what you know about your students' needs, your curricula and your specific context, would you like to modify the suggested categories (e.g., add to them, change them, delete one or more)?
- What changes would you like to make, if any?

The recorder should make agreed-upon changes to column A in the GoogleSheet.

6. Brainstorm specific knowledge and skills needed

Turn your attention to column B. As a team, move category by category (e.g., first content, then pedagogy and so on) and discuss:
- Given what you know about your students' needs, your curricula and your specific context, what specific knowledge and skills must your team members have?

The recorder should add specific knowledge and skills to column B in the GoogleSheet.

> **Tip**
> You can always modify these later. The four pre-populated categories are intended to help you think about broad aspects of the educator role.
>
> **Tip**
> Keep this high-level. These are the most important knowledge and skills that your team needs to have. You might start by looking at the knowledge and skills listed in the example tab of the spreadsheet.

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Rating your expertise 🕐 5 minutes

7. Rate your expertise

The recorder should add all team members' names and roles across row 1 (column C and onward). Team members should then rate their expertise relative to each of the specific knowledge and skills appearing in column B. Each team member, on their own device, should enter their ratings in their own columns.

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1:Little/no expertise   2: Moderate expertise   3:Proficient   4:Deep expertise
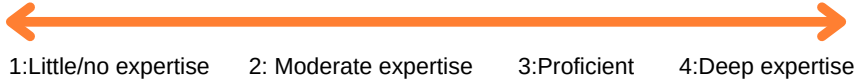
> **Tip**
> The idea behind distributed expertise is that we don't all have to be great at all aspects of the job. Providing the most accurate ratings of our expertise requires vulnerability, but it also helps us to recognize that we are stronger together.

Noticing 🕐 5 minutes

8. Notice strengths and gaps in team's expertise

As a team, discuss:
- In which areas of knowledge and skill (column B) does the team have strengths? To be a strength
- for your team, at least one team member should have rated themselves a 3 (proficient) or 4 (deep expertise) relative to that skill.
- In which areas of knowledge and skill does the team have gaps? To be a gap for your team, no team members will have rated themselves a 3 (proficient) or 4 (deep expertise) relative to that skill.

The recorder should complete the "Strength or gap in core team's expertise" column based on the team's discussion.

Planning to distribute expertise and fill gaps 🕐 15 minutes

9. Plan to distribute expertise

For each of the knowledge and skills listed as strengths for your team, discuss: Who can commit to leading the team relative to this knowledge or skill?

The recorder should note names in the "Lead(s)" column.

> **Tip**
> Make decisions based on your context. A lead might be responsible for a given knowledge or skill, or they might take responsibility for planning while others help with implementation. Each knowledge/skill might have one lead or it might have multiple.

10. Check for balance and discuss

- To the extent possible, has the team balanced responsibilities across members?
- Should leads shift in order to improve balance? This might mean that you have a lead with a lower self-rating than others on the team but overall, the work will be more sustainable.

The recorder should make any agreed-upon changes to the "Lead(s)" column.

11. Plan to fill gaps

For each of the knowledge and skills listed as gaps for your team, identify clear next steps. Some possible next steps might include: working with specific educators who work across teams (e.g., special educators, paraeducators); upskilling members of the existing team; bringing in community educators in paid or volunteer capacities; and intentionally hiring new members of the team with particular knowledge and skill, if the opportunity presents itself. The recorder should either note next steps in the appropriate row, or in whatever location works best for the team, based on their existing systems for communication.

Reflecting 🕐 5 minutes

12. Reflect together and discuss

- How might this activity have equipped your team to work more effectively together to better serve your students?
- As team members develop professionally, and as the team grows over time, strengths and gaps will change. When might it make sense for your team to engage in this protocol again?