

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. Additionally, it can help to identify other educators who may need to join the team and in what capacities.

Time required: 1 hour for a team of four to eight educators

Materials required: A quiet space, timer and computers

▶ 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 GoogleSheet and share the link with the team. [Click here](#) to create your own copy.
- 3. Preview the protocol and GoogleSheet.** Team members should preview the full protocol. Then, from their own devices, they should explore the spreadsheet created and shared by the recorder (within the spreadsheet, explore 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 and skills and knowledge needed (20 minutes)

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.

▶ Rating your expertise (5 min)

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.



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 the 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 min)

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. 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. 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?