

The Global People Toolbook

Managing the Life Cycle of Intercultural
Partnerships



GlobalPeople

**The Global People Toolbook:
Managing the Life Cycle of Intercultural Partnerships**

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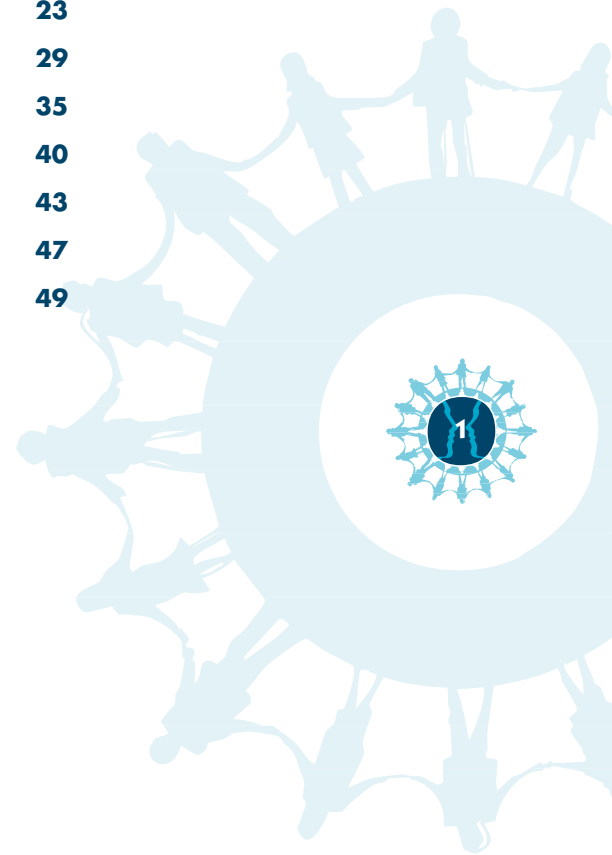
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Contents

	PAGE
1. About the toolbox:	2
● Overview of the Life Cycle Model	5
● The Five Life Cycle Stages	8
2. Stage 1: Preparation	11
3. Stage 2: Initiation	17
4. Stage 3: Experimentation	23
5. Stage 4: Consolidation	29
6. Stage 5: Transfer	35
7. The Competency Framework	40
8. The Learning Process in the Life Cycle Model	43
9. Using the Life Cycle Model in practice	47
10. Resource Section	49



Section 1: **About the toolbook**

Background

This Toolbook has been designed for those who are planning and running international projects and who feel a need for guidance. It has its origins in a major educational project, the eChina-UK Programme¹, that created new collaborations between UK and Chinese Higher Education Institutions around the development of e-learning materials. The rich intercultural learning that emerged from that programme prompted the development of a new and evidence-based set of resources for other individuals and institutions undertaking international collaborative projects. Although the main focus of the work is on *intercultural effectiveness* in international contexts, we believe that many of the resources have a more general value and are useful for those planning collaboration in any situation of diversity – national, regional, sectoral or institutional.

Why be interculturally effective?

It has long been recognised that the ability to operate effectively across cultures leads to positive outcomes and minimises the negative consequences of mishandling interaction. Intercultural effectiveness can help to reduce prejudice, build relationships of trust and generate creativity. It can also reduce the damage caused by low cohesion, high levels of miscommunication and personal stress. Much of the most influential research into working across cultures has been prompted by a concern to avoid the worst pitfalls of cultural ignorance. This has been especially true of fields such as international business management, where cultural misunderstanding can prove financially costly. The business management literature is full of examples of relationships soured, deals lost and mergers undermined through a lack of cultural sensitivity².

Why intercultural effectiveness matters in the HE sector

Business and government are not the only international operators: Higher Education Institutions (HEIs) are entering a new phase of rapid and competitive internationalisation. The market for higher education is now truly global: potential students can make choices about study destinations from an enormous range of institutions in any of the five continents. The audience for research is also global, with a proliferation of domestic and international journals, a multitude of international conferences in every discipline and widely-disseminated international indices ranking universities in terms of their publication

¹ For more information, see <http://www.echinauk.org/>

² As Rugman, Collinson and Hodgetts (2006) comment on a case study of international business :
“All this proves is that going global is hard work. Not all of these problems could have been foreseen, but a real lack of awareness of cultural differences did lead to many of the organization difficulties and people problems with a real impact on the bottom line.” (p. 129)



and teaching performance. In particular, the recent growth of the major Asian economies has re-shaped the profile of many UK universities both in the composition of their student bodies and also in the number, nature and importance of their overseas partnerships.

Higher Education, just like business, will need to develop and improve competency in the complex matter of achieving intercultural effectiveness: it is hard to imagine current internationalisation strategies being realised and maintained successfully without the development of skills in intercultural management. Moreover, the importance of intercultural effectiveness for HEIs lies not only in the creation and management of effective international partnerships: HEIs are also responsible for the welfare of their own foreign students. So, developing a higher level of sophistication in handling intercultural encounters is also a valuable internal strategy. The resources in this Toolkit and on the Global People website (<http://www.globalpeople.org.uk/>) have been developed to provide guidance and support for institutions facing both of these challenges.

Underpinning research and source of examples and cases

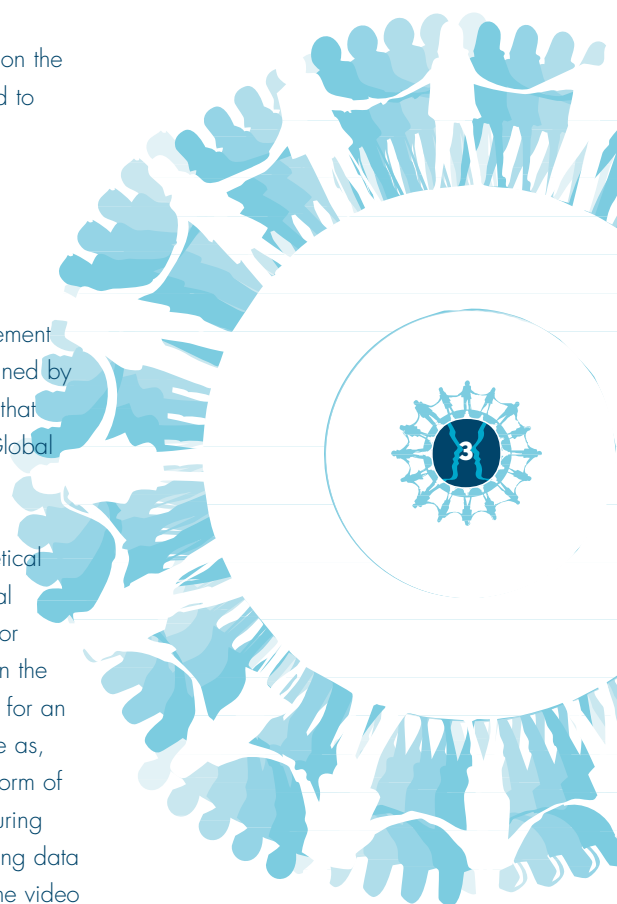
The material in this Toolkit is intended for practical use in the planning, management and evaluation of intercultural partnerships. Its organisation and layout are determined by that purpose and we have not, therefore, included full referencing to the research that supports this work. However, all of the supporting material can be found on the Global People website.

The background research for the current material was very broad in scope: theoretical and empirical work was drawn from a number of disciplines including international business management, organisational behaviour, applied linguistics and cross-sector partnerships. A full review of this literature is available in the Landscaping Study on the Global People website. This background research provided an intellectual context for an in-depth analysis of data from the eChina-UK Programme. This was a rich resource as, over four years of collaboration, the participating partners generated data in the form of presentations, papers, internal reports, interviews and audio/video recordings. During Phase 3 (year five) of the Programme the project team not only reviewed the existing data but carried out further interviews with project participants and analysed in detail the video recordings of project meetings, focusing particularly on communication.

The case study examples presented in this Toolkit are all drawn from the analysis of the eChina-UK Programme and represent accurate accounts of events, conversations and behaviour during the collaborations in that programme. Identification of individuals, or attribution of quotations, has been avoided and the emphasis throughout is on the use of the evidence to illustrate important lessons about intercultural effectiveness.

Audience

The primary target audience for this Toolkit is academics, project managers and other staff responsible for planning, managing or reviewing international partnerships and collaborations. Their contexts may be various: they may be involved in a one-off academic research collaboration or an ongoing institutional partnership; there may be a small



number of participants from just two different countries or a complex alliance of different partners. The focus here is on presenting and illustrating generic competencies and activities that should facilitate good project management and partnership skills in any situation of cultural diversity.

Purpose

Our purpose in writing this Toolbook is to provide this audience with a clear, step-by-step guide to managing the intercultural aspects of an international collaboration or partnership. It takes a life cycle approach and explains what needs to be handled at each stage of a collaboration. Our aim is to provide a practitioner-oriented document that will help its users to apply the information on the Global People website more effectively to the practicalities of management.

Benefit

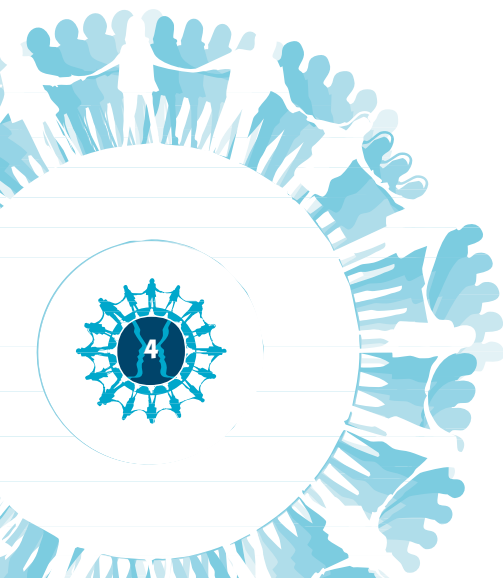
We hope that readers will derive the following benefits from using this Toolbook:

- greater understanding of the need for cultural awareness and effectiveness at key stages of the life cycle of an international project;
- awareness of the specific competencies that can be developed and actions that can be taken to support that awareness and effectiveness;
- awareness of the importance of active intercultural learning during an international partnership;
- an ability to use the Project Life Cycle Model, with accompanying tips, in the planning and management of specific projects or partnerships.

Added value

The Global People Toolbook differs from other guides to project planning or managing diversity in that it:

- is underpinned by a full set of intercultural competencies
- is grounded in recent international research
- provides generic insights which can be applied across many cultures
- is a dynamic model with learning at its core.



Section 2: Overview of the Life Cycle Model

Range of research and range of applications

The Project Life Cycle Model provides guidance on the whole life cycle of an intercultural project, from the preparatory (planning) stage through to completion and dissemination activities. It draws on existing models of project life cycles, on the recorded and researched experience of the eChina-UK Programme and on an extensive review of literature in intercultural communication and related fields. As developers of the model, we remain active in updating and developing its content and use.

Definition

The model presented is a five-stage model with a set of activities and intercultural competencies broadly associated with each stage. All models are necessarily a simplification and approximation of reality. Nevertheless, the Global People Life Cycle Model is firmly grounded in both research and in the practical experiences and observations of project teams from a number of different fields who have operated in situations of cultural diversity. Figure 1 shows the key stages of the model, and how intercultural competencies are core to the unfolding of the project. The movement from the Preparation stage to the Transfer stage (and so on) is represented here as a spiral in which growing competence in intercultural interaction, supported by reflective learning, facilitates effective progress in the international collaboration. In any real-life context this spiral might itself contain a number of smaller spirals where changes to the project, to the personnel or to the external circumstances may necessitate more preparation, a fresh initiation or further experimentation. In practice, the process will never be smoothly linear and the crucial notion to keep in mind is that, whatever the circumstances, attention to self-awareness and the building of individual and team competencies will contribute to greater intercultural effectiveness.

Main constituent elements

The model consists of four main elements:

- i. A five-stage schema of an intercultural collaboration. The stages are
 - Preparation
 - Initiation
 - Experimentation
 - Consolidation
 - Transfer

These are summarised in Section 3 of the Toolkit and are presented in detail in subsequent sections dedicated to each stage.

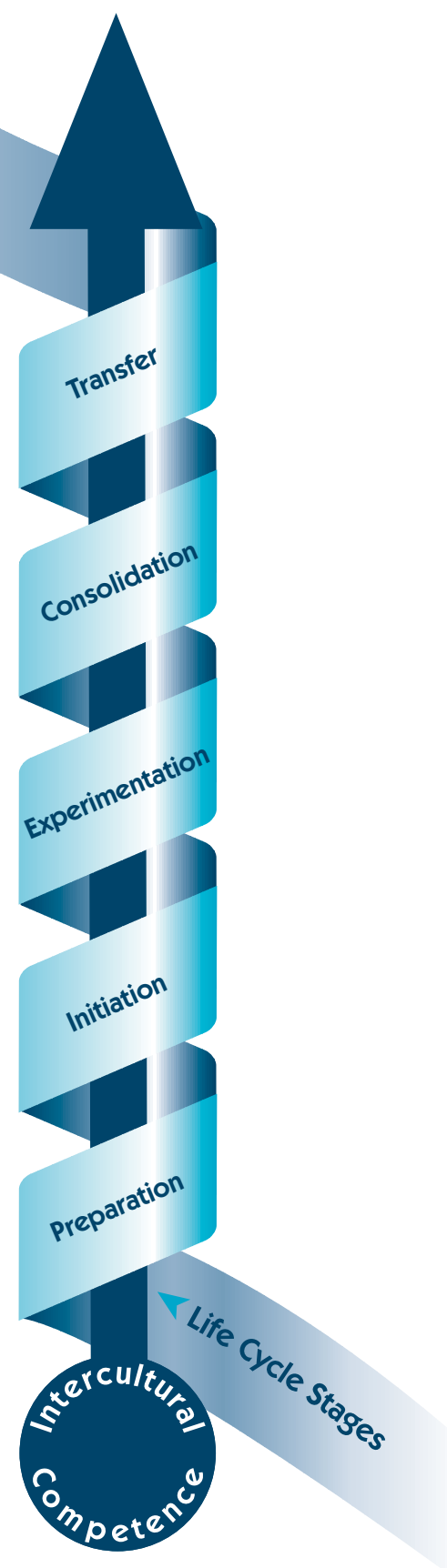


Figure 1: Diagrammatic representation of the Global People Life Cycle Model

- ii. Core activities that might be undertaken at each stage of the project to enhance intercultural effectiveness.

Although some activities are undoubtedly generic to all and any projects, we have sought to emphasise those that are of particular importance to intercultural projects and partnerships. The aim is to provide a sense of project priorities while keeping the amount of guidance manageable. All of the activities included are derived from existing project models based on recent research or from the research experience of the eChina-UK Programme itself. For each stage there are five recommended core activities. These are presented and explained in the sections covering the individual stages.

- iii. A set of *intercultural competencies* that will underpin successful achievement of these activities.

These are adapted from an established and thoroughly researched source, the World Work International Profiler Competency Set. The aim of the World Work competency set is to help professionals transfer their skills into unfamiliar cultural contexts; it focuses on the context of individual transition. In the Global People project, we have further developed this set of competencies in order to identify those that are especially relevant to international project work, including the stages of the life cycle and the key activities at each stage. Some competencies appear at more than one stage where this genuinely reflects their importance.

It is important to bear in mind that contextual factors – such as individual roles, the nature of relationships already established, and the specific organisational conditions encouraging or discouraging deeper levels of intercultural working – will influence the specific competencies needed at any one time. So a wider or different range of competencies than suggested in the version presented here may sometimes be needed, depending on the context. _

It is not realistic to expect all participants in every international project to have the resources and motivation to develop all the competencies needed to be interculturally effective at a sophisticated level – nor would that normally be necessary. Nevertheless, the value of identifying competencies is manifold. It can help determine who might be selected for a project team (e.g. selecting for established knowledge, expertise or sensitivity); it can prompt a team, or its individual members, to engage in personal development during the project; it can heighten awareness for all participants of where cultural communication may become a problem; and it can provide a focus for discussion – within and between teams – of how interaction might be improved. These are explained and illustrated in the sections covering the individual stages, and are presented conceptually in Section 9.

- iv. A *learning process* model that acknowledges the importance of building active learning into the collaborative experience.

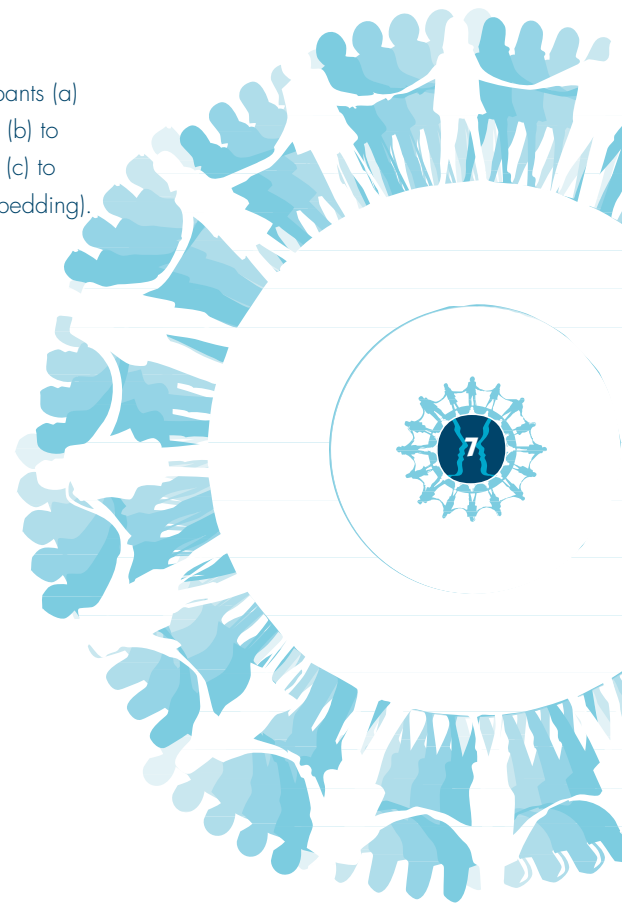


One of the weaknesses of many conventional life cycle models is the low priority given to active learning throughout the process.

The original research carried out for Phase 3 of the eChina-UK Programme demonstrated that conscious reflection on experience helped participants both to improve the way in which they worked together and to view the collaboration as a valuable personal learning experience. Ideally, project partners should plan their project schedule so that there are dedicated times for review of progress, reflection on intercultural challenges (or triumphs!) and revision of working practices. This should be in addition to any formal final evaluation that may be required.

An active approach to intercultural learning such as this will help participants (a) to prepare effectively by acquiring background knowledge (Acquisition), (b) to improve performance through reflection on experience (Awareness), and (c) to share their learning with the host institution and their wider networks (Embedding).

The Learning Process Model is presented in detail in Section 10.



Section 3: **The Five Life Cycle Stages**

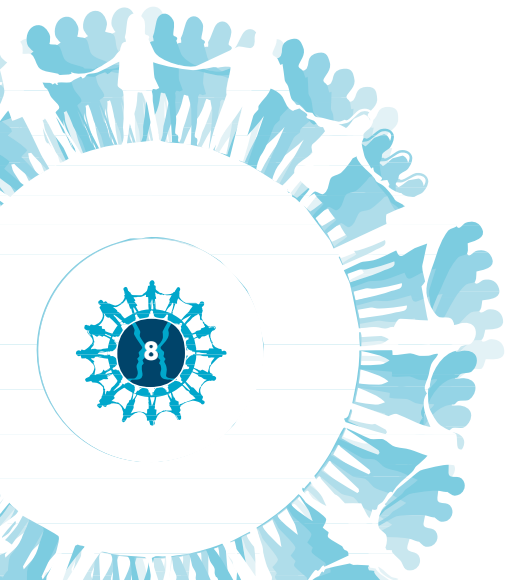
The names chosen for the stages reflect the particular concerns of an intercultural project. For example, the use of the word 'Experimentation' for Stage 3 deliberately emphasises the fact that the early stages of working together across cultures will involve a good deal of trial and error, of potential misunderstanding and of learning by doing. Similarly, we chose to use the title 'Transfer' for the fifth stage in order to avoid the sense that the completion of a single project is necessarily the end of a relationship or a broader collaboration: not only are the outputs from the project "transferred" (i.e. shared, disseminated, fed into new work) but also the intercultural learning and the networks of relationships can be transferred into new collaborations.

Stage 1 – Preparation

The first stage in our model emphasises the need for thoughtful preparation during that period when a project has been agreed but not yet begun, or has been proposed but not yet formalised. This is a common experience, especially in larger, international projects where basic decisions about funding, project objectives and partners may have been taken at the level of the funding organisation or lead partner but the main participants have not yet had an opportunity to meet or to agree a detailed plan of action. It is during this phase that all participants need to seek knowledge about their partners, about the possible cultural obstacles to working together and about the attitudes and competencies that might help them to overcome these obstacles.

Stage 2 – Initiation

We distinguish preparation from initiation in order to emphasise the shift in activities when the project is properly under way and the project partners have begun to work together on the planned actions. This stage is often still characterised by tentative contact and exploratory discussion but the emphasis will be more on the partners learning from (and about) each other. Thus, the main activities are different from the preparation phase and slightly different competencies become the priorities here. In particular, the participants need to cultivate an attitude of openness and be prepared to test out the knowledge they have acquired about their partners. All parties need to be willing to question their own assumptions and, on the basis of experience, re-think some of the professional beliefs, attitudes and behaviour they may have taken for granted.



Stage 3 – Experimentation

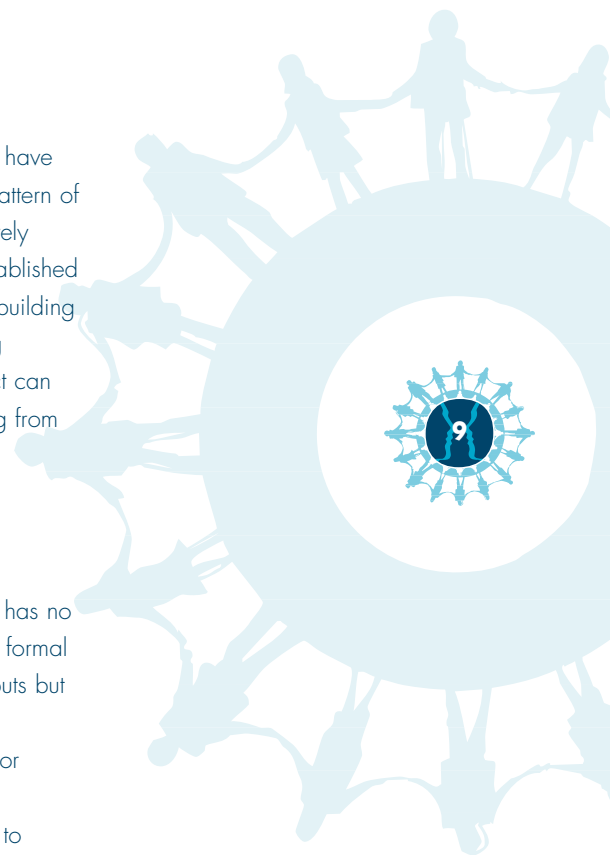
As the project begins to become established, a great deal of experimentation will still be taking place, both in the pursuit of solutions to practical problems and in the management of ongoing relationships between the participants. Understanding and managing differences of culture, language and objectives often remains a complex task and it is important for all participants that they maintain a sense of adventure and a willingness to experiment in order to achieve optimum solutions. Ground rules agreed in the Initiation stage may need to be re-negotiated; channels of communication adjusted; and time dedicated to reviewing progress and problems.

Stage 4 – Consolidation

This represents that phase of the project – the longest phase in a settled and successful collaboration – where partners are working together effectively and have achievements that can be acknowledged and celebrated. By this stage, the pattern of meetings, communications and collaborative work should have become relatively settled. Sufficient joint work will have been completed for partners to have established a degree of trust in each other's capacity and reliability. Investment of time in building social contact should have resulted in warmer personal relationships, including friendship among the participants. Positive outcomes emerging from the project can be communicated to the partner institutions and the process of sharing learning from the project will have begun.

Stage 5 – Transfer

It is rare – and rarely desirable – that a collaborative project simply ends and has no further outputs, influences or developments. Long before the project reaches its formal end-point, the participants need to have thought through not just the likely outputs but the channels of dissemination and the networks through which results can be communicated to others. A successful partnership may have prompted plans for further collaboration or for a longer-term association between institutions: transparency, imagination and determination will underpin participants' efforts to bridge cultural gaps and build sustainable relationships.





Section 4: Stage One: Preparation

Main activities in this stage

- *Develop a vision – conceptualise the project and articulate objectives*

Intercultural partnerships are particularly prone to mistaken assumptions and misaligned priorities in goals and objectives, and to suffer the consequences associated with these. The more each partner articulates for themselves the scope they envisage for the project and the objectives they have for it, the less likely it is that misunderstandings will arise when they begin discussion.

- *Research the context – cultural, institutional and professional*

When planning for international projects participants can often overestimate what they have in common with their international partners. Taking time up-front to research not only the national cultural values but also the organisational and professional contexts that their partners may bring to the project can help overcome false assumptions and avoid potential misunderstandings.

- *Audit intercultural skills and experience – including language skills*

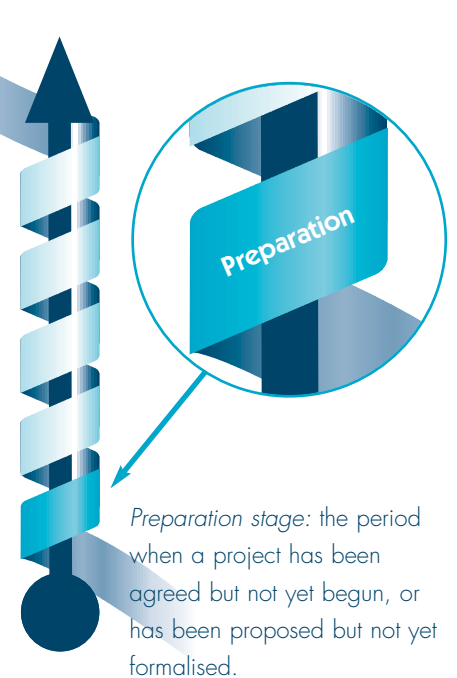
People are often selected to participate on international projects purely due to their technical and professional skills. Too little attention is then given to understanding where gaps may lie in terms of relevant international experience and language skills required to build trust with new partners.

- *Break the ice – make contact and initiate relationship-building*

One of the key initial challenges faced by an international project team with high levels of cultural diversity is a lack of internal cohesion, as people tend to find it difficult to feel a sense of 'we' with their international partners. Effective project leaders and sponsors tend to be proactive about relationship-building. They break down initial barriers by picking up the phone with new partners and organising face-to-face events.

- *Review channels of communication – including choice of language*

International projects involving culturally diverse teams have special challenges in holding together and sustaining effective communication at a distance. Special planning is required up-front by stakeholders and project managers in selecting and optimising different modes of communication (email, teleconference, face-to-face, online space etc.) to help manage this challenge.



Case Study 1: The Preparation Phase

The Higher Education Funding Council for England (HEFCE) and the Chinese Ministry of Education (MoE) established a new initiative in 2002 known as the Sino-UK e-Learning Programme (eChina-UK). A Joint Steering Committee (JSC) meeting was held in Beijing in October 2002, and members of that Committee decided how the British and Chinese universities selected for the Programme would be paired up. Each pair of universities was required to develop a detailed proposal which would need to be approved by the JSC before funding could be confirmed. This proposal was due to be submitted by March 2003. HEFCE appointed a full-time Programme Manager to manage the Programme from the UK side; the MoE established a secretariat in one of the Chinese partner universities to handle administrative matters. There was thus an underlying difference in the management arrangements which both sides were aware of but found difficult to handle.

The JSC meeting in October 2002 recommended that the next step would be for the Chinese partner universities to go to the UK to visit their British partners, and the UK Programme Manager attempted to arrange this. However, she got no response from the MoE to her emails and letters, and when she emailed and phoned the Chinese partner universities, including the secretariat, she got non-committal responses about such a visit. It seemed as though there was some kind of problem, but she had no idea what it was. She phoned a senior Chinese academic whom she knew well, and who was closely involved in the Programme, but he was not able to shed any light on the situation.

After a few months, all the British staff had become very anxious about the delay and so they decided to visit China instead. This was a step into the unknown as the level of commitment from the Chinese side felt low for the British, and they didn't know how they would be received. However, when the UK project directors and the Programme Manager arrived in Beijing in March 2003, they were welcomed very warmly by their Chinese partners. They were treated to lavish banquets and were taken out on sightseeing visits. All the British staff were delighted about this and some of their doubts about the Chinese commitment were reduced, but they were also anxious to start planning their joint proposals. Two of the British partner universities then ran into a noticeable problem. While in Beijing they were asked to plan and negotiate with the managers of e-learning institutes within their partner university. The British project leaders, who were all academics, felt they needed to meet with their academic counterparts in order to start planning the details of their collaboration. However, their Chinese hosts explained that it was necessary first of all to establish a project plan because only then would they know which academic partners to invite to join them. While the British agreed, they felt nervous about the feasibility of such an approach.

In terms of communication, the meetings were extremely tiring for everybody. Although the UK Programme Manager could speak fairly fluent Chinese, no other members of the British projects could speak any Chinese. Many of the Chinese partners spoke excellent English, but others had much more difficulty. Even when everyone spoke fluent English, partners often found they were unsure whether they were using words with the same meanings, despite the use of apparently simple words such as 'lesson', 'unit', 'course', 'activity'. There was a sense on both sides that more thought should have been given to anticipating the language divide, and planning a more effective response. Progress in developing a joint proposal was very slow.

Eventually, all the projects successfully developed and submitted joint proposals which were approved by both the British and Chinese sides and brought this preparation phase to a close. There was a sense though that opportunities for building higher initial levels of trust had been lost. The language issue seemed particularly critical in forming strong initial impressions. One of the Chinese project-members later commented 'I think we should show consideration for each other in terms of language. China is now developing very fast; they should know some Chinese to communicate with us... We have learned a lot of English, it's their turn to learn some basic Chinese, as it is two-way communication. I find it weird they don't know a word of Chinese'.



Commentary

Three project activities critical to the preparation phase that are illustrated in this case study are:

- a) *Research the context* – there were some important and unexpected differences in assumptions between the British and Chinese as to how the project would be managed; these needed to be more fully understood in preparing for this project.
- b) *Break the ice* – despite initial reservations and misunderstandings, both sides played their part in pushing the relationship forward in very different ways.
- c) *Review channels of communication* – there was a sense from both sides that not enough thought had been given to bridging the language gap between them.

Look at the Resource Section for a full list of competencies relevant to this stage.

Here are some competencies that connect to the case study and support the activities:

- a) *Research the context: 'Information gathering' and 'new thinking'*

While some effort was made by the UK partners to search out and question local informants (an aspect of 'information gathering') about the reason for the silence from the Chinese, more work could have been done up-front to gather information about the cultural, organisational and professional context in which their partners were operating. It may have also helped to be more proactive in challenging their own assumptions (an aspect of 'new thinking') about how things may be organised differently in the partner culture. The lack of emphasis on these two qualities may have contributed to two challenges. Firstly, it emerged later that one reason for the silence from the Chinese MoE was personnel and policy changes at senior levels in the MoE. Lack of 'insider knowledge' about this resulted in considerable anxiety, which was exacerbated by a lack of clarity from the Chinese partner. Secondly, the planning role of e-learning institutes in China (who typically did not have academics on their staff) was not anticipated by the UK side, who assumed that planning would be done by British and Chinese academics prior to the formal launch of the project. The result was that key academic stakeholders on the Chinese side were not present in some key initial meetings. Fewer assumptions and more research might have reduced stress, anxiety and misunderstanding for those involved.

- b) *Break the ice: 'Welcoming strangers', 'spirit of adventure' and 'sensitivity to context'*

The fact that the UK team were willing to arrange an unsolicited trip to China showed a willingness to push themselves into an ambiguous and potentially uncomfortable situation as a means of learning (an aspect of 'spirit of adventure'). The warm and friendly response of the Chinese, from their side, clearly showed an interest in proactively breaking the ice with their new potential partners (an aspect of 'welcoming strangers'). The British side's willingness to overcome their initial reservations and agree to initial meetings without key academic stakeholders showed a sensitivity to local power and role relations (an aspect of 'sensitivity to context').



c) *Review channels of communication: 'Communication management' and 'language learning'*

Formal language learning for both sides might be inappropriate as a preparatory tool for working on this project, particularly if not everyone in this initial group of stakeholders would have an ongoing need for communication in the project after proposals were approved. However, as the final comment from the Chinese team member suggested, there would certainly have been a benefit for the UK side to invest in learning words and phrase in Chinese (an aspect of 'language learning') to show respect, and to repay the effort that was being made by their partners in working through English. Even more critical was the lack of attention given to how to manage the language gap existing between the sides. More reflection needed to have been given as to how to deal with communication problems (an aspect of 'communication management') and support the less fluent Chinese English-speakers in handling the information-exchange and discussion involved. This could include sending more background information to read in advance, and getting key documents translated.

Key tips

- 1) Look for people who can act as 'cultural bridges' in the sense that they have experience of working in both cultural contexts, and can make sense from one side to the other. But be careful to identify people who have sensitivity at an organisational and professional level as well as at a national cultural level.
- 2) Draw on a range of strategies to gather information about your partner's cultural context – not only books and documents but also conversations with native informants. Realise that it is difficult to predict what you need to know, so take every initial contact with your partners as an opportunity for exploring potential areas of cultural difference. Be ready to reveal an attitude of modesty about your knowledge of the cultural context in which your partner works while showing self-confidence in the technical skills you bring to the project.
- 3) Do not treat generalisations about other cultures as immutable facts, and avoid treating people according to stereotypical beliefs rather than individual personalities. Remember that research on national cultural values is not designed as a toolkit for dealing with individuals, and does not predict how people from other cultures will adapt when working with you.
- 4) Discuss and articulate your objectives clearly within your local team before you meet your international partners. The challenge of collaborating with culturally different partners is exacerbated if there is already a lack of clarity in the kind of project outcomes you are looking for, and how to communicate these to others.
- 5) Use the Team Resource Audit tool (see Tool 1 in the Resource Section) to reflect on possible gaps in non-technical skills that may be critical for building trust on an international project.

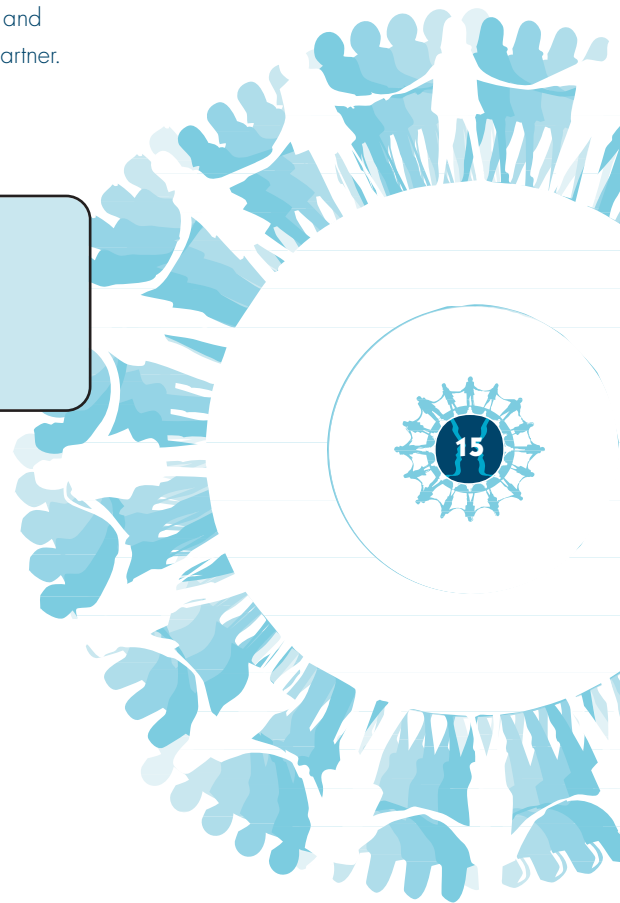


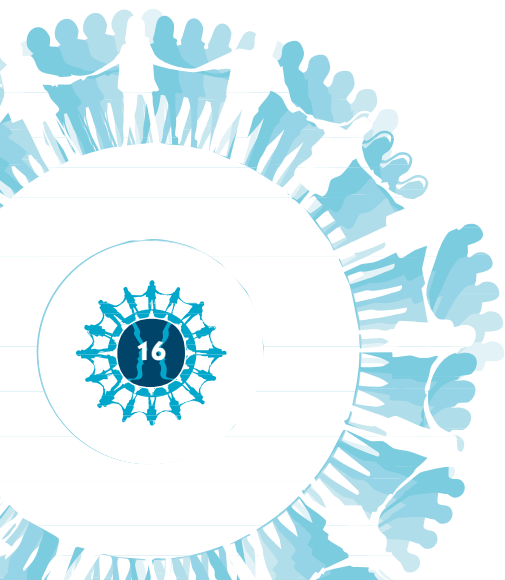
- 6) Breaking the ice does not, as in the eChina-UK Programme, necessarily involve a formal face-to-face meeting. Be ready to pick up the phone and introduce yourself to individual partners where a common language exists. This is an opportunity to build trust and relationship by expressing your enthusiasm about working with them on the project as well as learning more about the relevant experience they bring and goals they have.
- 7) Remember that even the most basic skills in another language will be of help in establishing a climate of mutual respect and is likely to be viewed positively by your international partners. When needing to rely on English in substantive discussions be ready to adjust your use of the language to avoid idioms and jargon, as well as slowing down without patronising your international partner.

A tool for self or team development:

- **Tool 1: Team Resource Audit**

See the Resource Section





Section 5: **Stage Two:** Initiation

Main activities in this stage

- *Explore objectives and establish common ground*

In international projects, especially those involving partnerships between different organisations, it can be difficult to establish a sense of common ground among project partners. This can only be achieved if differences are assumed, and if there is a joint willingness to elicit and explore carefully each other's objectives before establishing a common way forward.

- *Examine stakeholder interests – recognising cultural constraints that impact on priorities, buy-in and decision-making*

Often in international projects there are different cultural assumptions about the extent to which project members have autonomy in decision-making, and the processes by which stakeholders need to be consulted and/or kept informed. It is thus particularly useful to place a greater emphasis both formally and informally on understanding the needs of sponsors and stakeholders.

- *Review resources and define roles and responsibilities*

It is easy to jump to conclusions about the skills and experience of one's international partners and the technical and human resources they bring to the project. Valuable trust can be won by taking time to understand people's competence, and the experience they bring to the table before defining roles.

- *Build personal relationships – develop a people orientation rather than just a task orientation*

One of the challenges of international projects is how to gain extra commitment from the project members involved. A key element is to build meaningful personal relationships and to embed the task within this context. This can overcome initial low levels of trust, and sustain communication at a distance.

- *Agree ground rules for communicating – identifying preferred modes of working together inclusively*

One of the biggest challenges of working in culturally diverse teams is gaining a sense of commonality around sensitive process issues such as the role of emails, the choice of language, and appropriate etiquette in meetings. Creating ground rules, rather than allowing each cultural group to go their own way, provides an opportunity for creating a team culture that can help build longer-term commitment to the project.



Case Study 2 – The Initiation Phase

After the Chinese and British project partners of the eChina-UK Programme had submitted their joint proposals and had received approval to proceed, they needed to start implementing their proposals. One initial issue that impacted on the effectiveness of collaboration in some projects was different assumptions between the Chinese and UK side about the goals of the project. These were not fully recognised and discussed in the first meetings. The Chinese tended to see the programme as an opportunity to deliver products to trainee teachers, drawing on a team of academics acting as experts in learning methodology, and technical people who would deliver this to the needs of the market. The UK side, on the other hand, versed in Western principles of continuing education, tended to see the programme as an opportunity to research and respond to learner needs. They drew on a team of academics with individual interests in researching these needs, and did not at this stage draw on technical experts working in the field of instructional design. It was perhaps not surprising that the Chinese technical people tended to be less pro-active in interacting with UK partners in early meetings and, also hampered by low-level English language skills, tended to sit in the background. In fact, little or no time was spent discussing each person's area of expertise (i.e. people beyond the core team), and as a result, one project simply assumed for quite some time that a particular person was an academic developer, when in fact she was primarily an instructional designer.

The failure to explore differences in cultural perspectives led to problems further down the line. On one of the projects the UK academic team assumed that their Chinese counterparts gave the same priority as them to researching the needs of target learners before designing the materials. Thus they went ahead and devised a questionnaire for distribution to their target learners (Chinese secondary school teachers of English) who were difficult to make contact with as they were dispersed over China. The UK team also requested that some 'typical' Chinese secondary school lessons be video-recorded, so that they could gain a richer picture of the trainees' teaching context. They thought their partners had agreed to this, but seven months passed and they still had not received any information. After prompting their partner, they were very shocked to receive an email saying, "It makes almost no sense to implement such a survey since we develop such an online courseware for a so diverse population that it is not possible to find any samples which can stand for all in terms of their characteristics... They are more than some hundred thousand... I think what we should do is just to develop the learning materials based on what a professionally qualified school teacher for English in China should do – required by the educational authority – be capable to do." In reply the UK side commented, "It is a pity that the points you raise in the e-mail were not discussed with us in August, when we were getting feedback from you on the design of the needs analysis instruments." Clearly, if there had been a more effective process for exploring differences and similarities up-front, this kind of misunderstanding might have been avoided.

One additional challenge that project teams faced in working collaboratively was establishing how they would overcome the geographical distance between them. In their initial meetings everyone agreed that, despite advances in technology, regular face-to-face meetings would be essential for complex discussions and negotiation, and for relationship building. Two of the joint partnerships decided to use 'extended stay', whereby a member of the Chinese team came to Britain and worked with their British partners for either 6 or 12 months. This provided an excellent opportunity for extended, in-depth collaboration and relationship-building; however, later in the project the British realised that their contact with their Chinese partners was very narrow in scope, and was highly dependent on a single individual who could, in effect, act as a gatekeeper. The other joint partnership agreed on 'exchange visits', whereby small teams of people visited the other country for one or two weeks on a fairly regular basis. This arrangement entailed periods of very intensive work, which were very demanding (especially for the host partners, who simultaneously had to handle their ongoing responsibilities) but they were usually extremely productive. This was partly due to the willingness of team members to give their free time to build social relationships outside the strict boundaries of the project definition.



Commentary

Four project activities that are critical to the initiation phase and that are illustrated in this case study are:

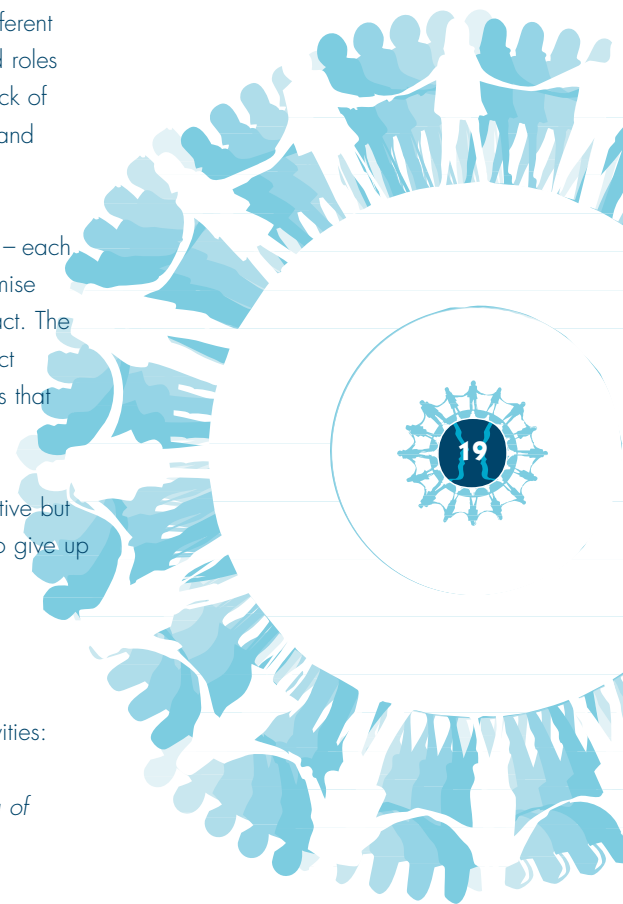
- a) *Explore objectives and establish common ground* – there was a lack of recognition about the differing goal priorities separating the two sides, with the result that the opportunity to value diverse perspectives and find real (rather than imagined) common ground was lost.
- b) *Review resources and define potential roles and responsibilities* – the different goal priorities of the two sides was reflected in the different skill sets and roles within the teams they brought to the first meeting. There was clearly a lack of recognition of this issue with the result that roles were not made explicit and mistaken assumptions were made about what individuals had to offer.
- c) *Agree channels of communication and effective communication patterns* – each project seemed to make explicit decisions about how to select and optimise modes of communication, with a strong focus given to face-to-face contact. The emphasis given by one project on sustaining ongoing face-to-face contact through the ‘gatekeeper’ role had disadvantages in terms of effectiveness that were perhaps not sufficiently anticipated.
- d) *Build personal relationships* – exchange visits proved particularly productive but their success depended on the willingness of individual team members to give up their free time to get to know each other outside the daily meetings.

Look at the Resource Section for a full list of competencies relevant to this stage.

Here are some competencies that connect to the case study and support the activities:

- a) *Explore objectives and establish common ground: ‘goal orientation’, ‘building of shared knowledge’ and ‘acceptance’.*

Within the broad remit of each project, there was a greater need for individual partners to show interest in each other’s goals and to seek to take them into account in establishing a clear and united way forward (an aspect of ‘goal orientation’). This may demand the skills of a project manager who would be sensitive to the fact that key areas of commonality and diversity were not being made explicit, and who would thus elicit or disclose the background information needed for mutual understanding and meaningful negotiation (an aspect of ‘building of shared knowledge’). This project manager, and the members of the team, would need to be positive about, and communicate respect for, the differences in objectives revealed (an aspect of ‘acceptance’). There is a sense in the case that a project manager giving energy to these key intercultural qualities was an important missing element in the early encounters between the two sides.



b) *Review resources and identify potential roles and responsibilities: 'new thinking'*

The assumption from the UK team that the quiet course designer was an academic reveals the importance of avoiding quick judgements based on first impressions (an aspect of 'new thinking' relating to openness and flexibility). Other comments from eChina-UK collaborators, not included in the case-study, reveal that one also needs to be flexible in applying cultural generalisations about national cultural values to individuals and groups working in specific contexts. For example, the much-cited group orientation of the Chinese was not seen by the UK partners to be typical of the learning style of the Chinese trainees in their classes. It was, however, seen as much more observable in all-Chinese work teams when the UK partners were not directly involved.

c) *Agree channels of communication: 'communication management'*

The need to plan the management of communication at a distance during the preparatory stage of a project has already been mentioned. Now, with the project underway and the teams face-to-face for the first time, there is an opportunity to create a team culture around communication by turning these plans into a negotiated reality. The challenge with the 'gatekeeper' role, however, reveals the complexity of finding the right approach to managing communication in an international remote team. It indicates that choosing and agreeing to the right modes of communication (one aspect of 'communication management') needs to be combined with ensuring that suitable communication networks of people are established (another aspect of 'communication management').

d) *Build personal relationships: 'rapport building' and 'interpersonal attentiveness'*

The case reveals the link between interpersonal relationships and effective collaboration. There is an important need at the beginning of projects for individuals who are warm and friendly, and who are willing to invest the extra time required in building personal relationships (both aspects of 'rapport building'). When working with Chinese partners, socialising and hospitality is a strong symbol of the status and importance attributed to partners and is thus an example of giving face (an aspect of 'interpersonal attentiveness').

Key tips

- 1) Assume difference in priorities until similarity is proven. Open up the discussion on past experience of other projects, current challenges and future aspirations in order to build mutual understanding. Draw on relationships established at the Preparation stage and informal discussions outside group meetings to help legitimise and frame the debate during the meetings themselves. Use the Partner Review checklist (see Tool 2 in the Resource Section) to reflect on key aspects that need to be understood about a partner.
- 2) Ensure that there is a healthy and culturally sensitive balance between focusing on task and relationship-building within a project. Remember that the British tend to prefer informal events where attendance is optional while other cultures (like



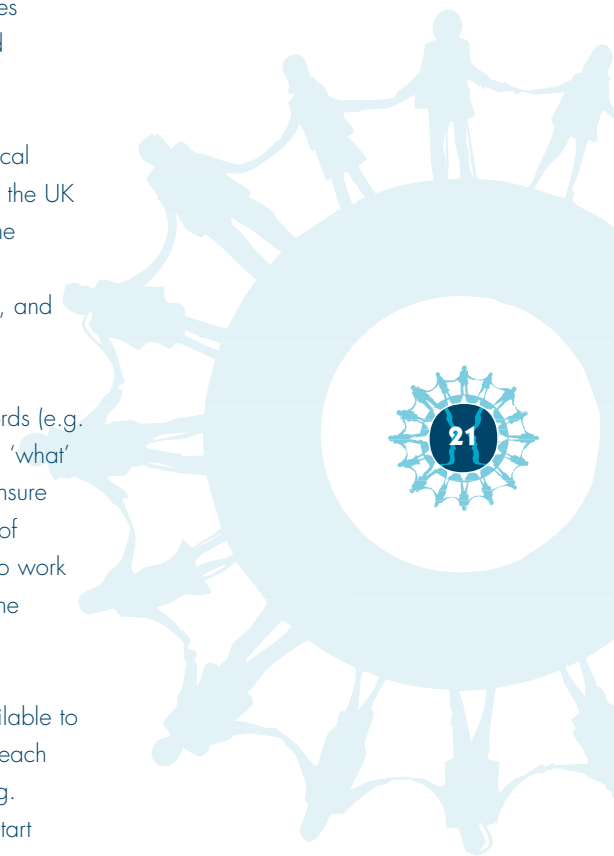
China) prefer more formal occasions where attendance is expected, and high levels of hospitality are shown. Reflect on which of the Tips for Building Rapport (see Tool 3 in the Resource Section) are useful for you.

- 3) Do some stakeholder analysis so there is clarity about the key networks that need to be involved when managing communication channels. Support this by open questions to understand the interest of each stakeholder in the project and the organisational culture factors that may explain this.
- 4) While searching for common ground, be ready to push forward strongly and consistently your own sense of what the most appropriate project outcomes should be. Note that too much adaptability can reduce your integrity and predictability in the eyes of others, and thus reduce trust.
- 5) Encourage each cultural party in the project to present a big picture of local institutions and political systems impacting on the project. With hindsight, the UK side would have benefited from a more detailed understanding of how the Chinese educational system worked, including practical insights into the organisation of schools. This would have aided comparisons with the UK, and anticipated areas of misunderstanding.
- 6) In areas where there seems to be common understanding around key words (e.g. 'lesson', 'unit', 'course' in eChina-UK) use open questions (beginning with 'what' and 'how') to explore underlying meaning and get concrete examples. Ensure that some existing products or artefacts (e.g. learning units in the context of eChina-UK) are modelled and reviewed. Then, when people are asked to work on something, there is already more common understanding as to what the outcome may look like.
- 7) Discuss and identify the different channels of communication that are available to the team. Ask the team to identify the advantages and disadvantages of each method and the types of communication for which each is best suited (e.g. 'planning activities', 'information updates'). Use the learning from this to start agreeing some protocols for ongoing communication.

Two tools for self or team development:

- **Tool 2: Partner Review**
- **Tool 3: Tips for Building Rapport**

See the Resource Section





Section 6: Stage Three: Experimentation

Main activities in this stage

- *Test out initial agreements and procedures – recognise wider stakeholder interests*

Having established a common direction in terms of goals, roles and behavioural ground rules, international project partners need to recognise that such plans will need to be tested out, modified and re-negotiated to take into account the cultural constraints and evolving priorities of their local working contexts. This will include consulting with local stakeholders and planning to report back to the project team on the implications as the project goes forward.

- *Actively encourage reflection – share cultural learning with the wider team*

There is a danger that without active group reflection, changing local priorities that affect the outcome of project activities are not made explicit, and this can undermine the success of the team. Regular reflection sessions can include formalising some of the learning about the different operating contexts and cultural preferences of the partners, and discussing how these cultural factors may need to be managed more effectively.

- *Revise collaborative systems and procedures, and ensure engagement*

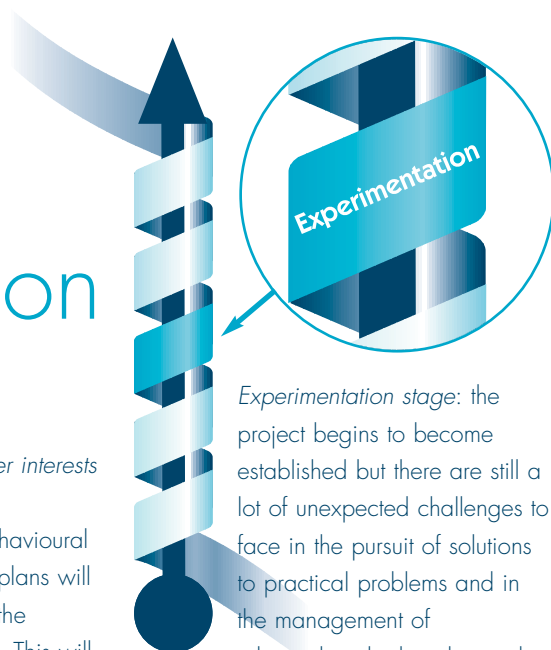
Existing systems and procedures negotiated up-front in an international project may no longer be 'fit for purpose' due to changing circumstances and emerging cultural constraints. There is a need to take risks in devising and trying out new solutions in international contexts, as there tends to be more difficulty in sharing concerns and putting issues on the table when working across cultures and at a distance.

- *Maintain effective ongoing communication and ensure engagement*

As unanticipated challenges arise, there is a danger that the level and quality of communication diminishes. Too much emphasis can be put on email, and not enough on securing or building the personal relationships already established.

- *Harness the networks – access wider respective networks and utilise additional resource*

Working in diverse and geographically spread working contexts can bring a wider range of networks to bear on achieving the project team's task than would be available when working side by side in the same organisation. Partners need to take the opportunity of being apart to reflect on how they can leverage their own individual networks in new ways for the benefit of the project.



Experimentation stage: the project begins to become established but there are still a lot of unexpected challenges to face in the pursuit of solutions to practical problems and in the management of relationships both within and outside the team.



Case Study 3 – The Experimentation Phase

In Phase 2 of the eChina-UK Programme, the lead Chinese partner in one of the projects proposed bringing six further Chinese universities into the project group. An e-learning course had been jointly developed during Phase 1 and the aim was to roll this out in Phase 2 to a selected group of institutions across China. A strong, long-term relationship had been established between the UK partner and the lead Chinese partner – they were both prestigious universities with a history of international collaboration and the eChina-UK project had been regarded by both sides as a high-value collaboration. Now the UK partner was faced with six new institutions with which it had no prior relationships and about which it had little knowledge. The UK team found itself heavily dependent on their main Chinese partner for information and access. However, the Chinese partner did not provide detailed information about the new universities and was slow in getting an endorsement from the senior management of these new universities with respect to their involvement. There was a sense from the UK side that the new partners had been selected by the stakeholders on ‘political’ grounds and less thought had been given to their ability to adapt to the practical demands of the project. Particularly at a technological level, they did not seem equipped for their sudden involvement in an international project demanding online access to e-learning materials.

This posed a challenge for the UK team as they were responsible for setting up the technological links required to distribute the materials through the new network. Initially, they tried to work through their existing lead partner to gather information and to set up technical links between the institutions. The understanding had been that electronic teaching material would sit centrally on the system of the lead Chinese partner but this proved difficult due to lack of technical support on the Chinese side. The chief educational technologist in the UK asked to visit each of the new institutions but this appeared to be difficult to arrange. All communication, on both sides, was being channelled through the lead Chinese university and the other universities did not appear to have appointed anyone with responsibility for the technology. The chief educational technologist, despite assurances from his partners, remained sceptical about the capacity of the lead partner’s server to distribute the materials. Faced with real problems and already four months into the project he chose to force the issue by doing a test-run of the e-learning system: this proved that the planned infrastructure wasn’t workable. The technologists in the UK needed to be imaginative in finding other ways of communicating and collaborating with their new partners.

The chief educational technologist in the UK took two steps to improve communication. Firstly, he enlisted the support of a Chinese academic colleague who had studied in the UK and was able to act as a mediator with the lead university. This helped to establish who to talk to and how to access the people who could really get things done. The project management staff in China simply hadn’t had the knowledge or influence to organise the technical side of the project. Having the help of a more senior academic figure meant it was easier to identify and access the key decision-makers. Secondly, he recruited a Chinese-speaking developer into his technical team so that more of the email communication could be handled in Chinese, with the hope that this would both accelerate the communication process and build relationships.

Improved communication led to improved technical knowledge and an opportunity to experiment further with solutions to the technical problems. A number of iterations of the main programme were tested and, with better feedback from all of the partners, a final decision was taken to create standalone versions of the e-learning programme for each of the partner universities. In retrospect, the UK team considered that two measures might have improved the collaboration: one or more technical staff from China could have visited the UK for initial training, and personal visits to all of the partner universities by the UK team would have facilitated knowledge and communication. Nevertheless, the UK team had proved that persistent experimentation had finally produced a technically and culturally appropriate solution.



Commentary

Four activities that are critical to the experimentation phase and that are illustrated in this case study are:

- a) *Test out initial agreements and procedures* – little thought had been given as to how the resources and experience brought by the new partners would impact on the practical working practices already established in the project. The chief educational technologist needed to be pro-active in doing a test-run that confirmed the importance of finding a new way of working together.
- b) *Revise collaborative systems and procedures* – a number of different iterations of the programme were tested out until feedback proved that the best solution was a stand-alone version of the e-learning programme for each of the universities.
- c) *Maintain effective ongoing communication and ensure engagement* – engagement in the process of test and re-test, leading to the final technical solution, was greatly aided by the cultural sensitivity of the chief technical officer in drawing on local Chinese resources in the UK to improve communication links. Opportunities were missed, however, by not making a personal visit to the new Chinese universities.
- d) *Harness the networks* – one of his best tactics here was bringing in the Chinese academic colleague who was able to act as a mediator with the lead partner, and get round the technical bottleneck they were facing.

Look at the Resource Section for a full list of competencies relevant to this stage.

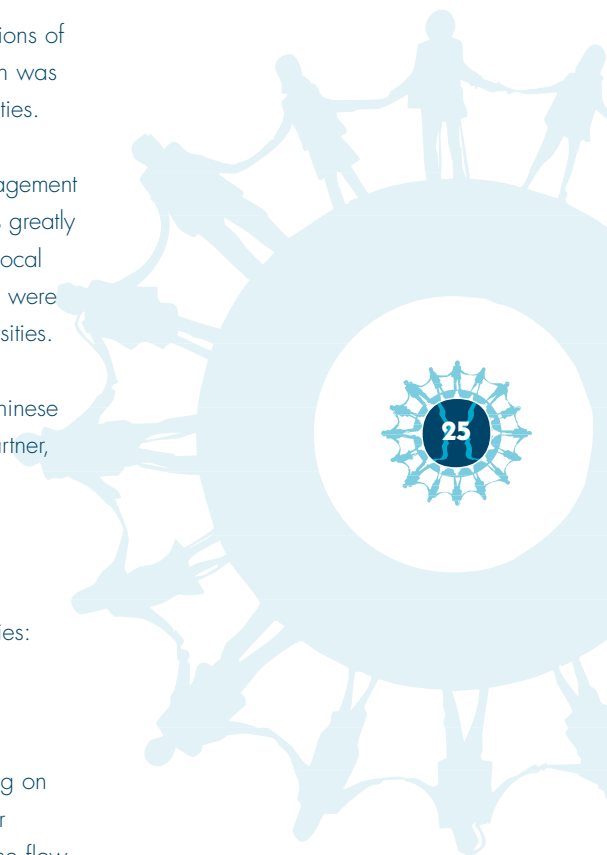
Here are some competencies that connect to the case study and support the activities:

- a) *Test out initial agreements and procedures: 'Inner Purpose' and 'Resilience'*

The chief educational technologist revealed a strong sense of conviction in acting on his beliefs so as to keep the project on track in difficult times (an aspect of 'inner purpose'). This willingness to follow your own inner beliefs rather than go with the flow can be critical for any project manager needing to get things done in a period of flux. His decision to act unilaterally in 'forcing the issue' by running the test obviously risked making a social gaffe and getting negative feedback from his international partners (an aspect of 'resilience'). This attitude, however, combined with a strong sense of self-belief can often be critical in moving things forward.

- b) *Revise collaborative systems and procedures: 'Synergistic solutions'*

In the case-study the ideal solution of working closely together with expert Chinese colleagues over a longer period of time to find the best solution to their technical problems was not feasible. However, drawing on a mixture of testing processes and improved communication links, the chief educational technologist found a way of ensuring that different perspectives were brought to the surface and used in problem-solving (an aspect of 'synergistic solutions').



c) *Maintain effective ongoing communication: 'Communication Management', 'Rapport building' and 'Attuning'*

In his attempt to find a solution to his technical challenges, the chief educational technologist was proactive in taking practical and culturally sensitive steps to deal with the communication problems he faced (an aspect of 'communication management'). His idea of handling more email communication in Chinese was particularly effective in terms of quickly overcoming blocks to communication that had their root in language issues. He thus demonstrated a willingness to attend to the choice of working language (another aspect of 'communication management') in a way that, as already described, was not always typical of other UK-based managers working on the eChina-UK projects. With hindsight, he realises that he could have improved communication equally well or better by paying a visit to his new network of partners. There, by showing warmth and friendliness, and making personal connections (both aspects of 'rapport building' already mentioned in the commentary on Case Study 2), he could have increased the sense of engagement and commitment from his Chinese partners, and thus encouraged more willingness to put their technical issues on the table. He could also have used the opportunity of being face-to-face to observe his partners, and through indirect signals of meaning (such as intonation, eye contact and body language) picked up an idea of how they were feeling about the project (an aspect of 'attuning').

d) *Harness the networks: 'interpersonal attentiveness'*

In addition to the focus on communication management, his action of bringing in the senior Chinese academic as a mediator shows an attention to the individual sensitivities of his Chinese partners (an aspect of 'interpersonal attentiveness'). They are more likely to express their concerns in their own language, without the fear of losing face.

Key tips

- 1) Arrange for a regular review from each side to be integrated into the update meetings. This should look at 'new opportunities' as well as 'unexpected challenges' that impact on the goals established in the early stages of the project.
- 2) Ensure that there are digital records of some of the key team discussions recommended at the initiation phase – stakeholder analysis, channels of communication, roles and responsibilities – that can be re-worked at a distance to take into consideration changing situations.
- 3) Give ongoing emphasis to asking each side to present background information on the institutional and organisational context they are working in, specifically where this is of relevance to new issues arising. For example, the chief educational technologist would have benefited from a presentation from the Chinese partners on the higher education system in China and the relationship between universities.
- 4) Extend the work done in the initiation phase on communication channels (see Key Tip 7 for the Initiation stage), while reflecting on the experience of communicating together in the first few months of the project. Use the

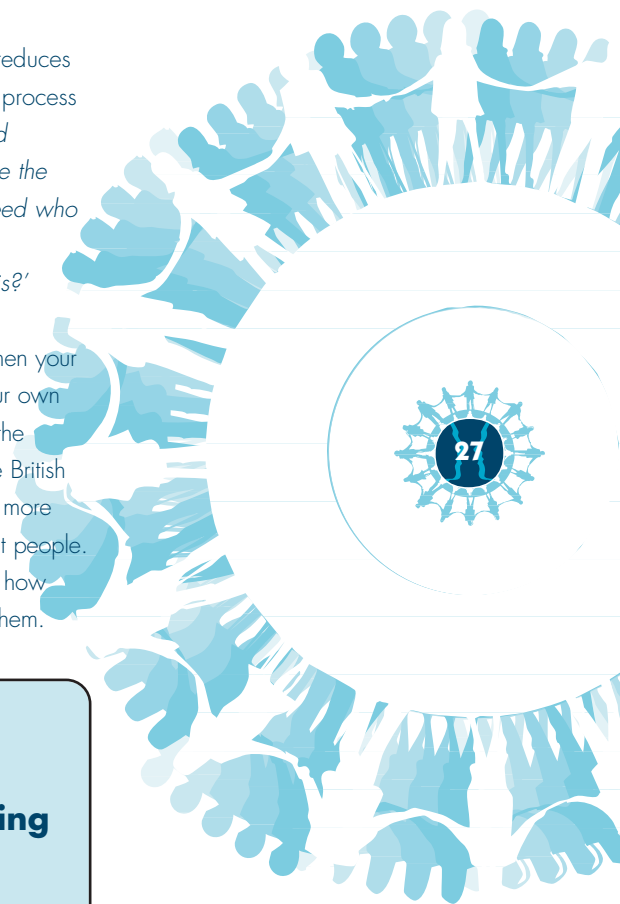
Communication Review tool (see Tool 4 in the Resource Section) which links the channels of communication (how we communicate) not only to types of communication (what we communicate about) but also to the timing ('how often' we communicate).

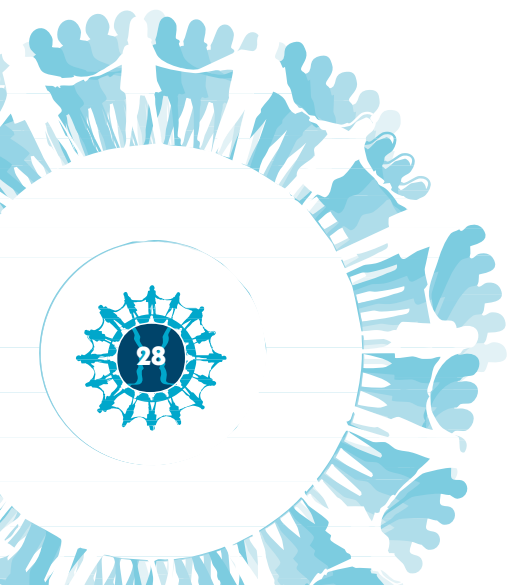
- 5) Pay particular attention to indirect signals (body language, silence or ambiguous phrases, lack of response to emails) that may indicate concerns which are not being put on the table. Where possible explore these on a one-on-one basis over the phone or face-to-face rather than in a group context. Find ways in which the concerns can be de-personalised and brought back to the team to discuss.
- 6) Model a style for re-establishing shared knowledge that builds trust and reduces uncertainty in the group. This may involve contributions from the chair or process leader that sound like this: *'In our first meeting we made some very good progress in planning how to communicate together. We agreed what are the best modes of communication, and what to talk about. We haven't agreed who are the networks of people who need to be included in each type of communication. Can I suggest we ask each side for their opinions on this?'*
- 7) Be seen to remain positive when things do not go according to plan or when your expectations concerning the behaviour of your partners are not fulfilled. Our own feelings of anger and irritation can be a result of our failure to understand the cultural priorities of others. Research tends to indicate, for example, that the British are more likely to stick to rules regardless of context, whereas Chinese are more likely to adapt the rule to changing circumstances or the needs of important people. This provides plenty of scope for irritation on both sides. Show empathy to how others may see the world differently, and do not assume you can change them.

Two tools for self or team development:

- **Tool 4: Communication Review**
- **Tool 5: Six Steps to Effective Team Learning**

See the Resource Section





Section 7: Stage Four Consolidation

Main activities in this stage

- *Consolidate procedures – harnessing improved mutual understanding*

As a project matures there is a tremendous opportunity to consolidate communication practice based on a more developed mutual understanding between the international partners involved. When relationships are established, and initial progress on tasks has been achieved, differences in cultural values and approach are no longer a potential deal-breaker but an opportunity for building mutual respect and harnessing creativity.

- *Feed creativity through exploring differences*

One of the advantages of highly diverse international project teams is the difference of perspectives and views brought by the different parties to the challenges and issues faced. Surfacing and exploring these different perspectives can be an important platform for creativity and improved problem-solving.

- *Communicate achievement, and celebrate success*

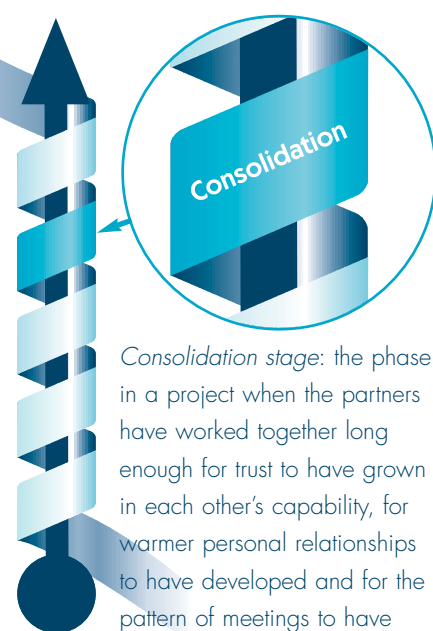
When separated by differences in geographical location, mother tongue and cultural values, it is both more critical and more challenging to sustain motivation through the full life cycle of the project. Feeling a sense of achievement and success is an important universal motivator but finding a culturally appropriate means of communicating and celebrating can be challenging.

- *Sustain context-rich communication – based on deepening personal relationships*

One of the great rewards of working on an international partnership can be the experience of building relationships with people from cultural and organisational settings that you are unfamiliar with. Such relationships, and the increasing productivity that they tend to bring, need to be nurtured with a willingness to engage partners regularly over the phone and face-to-face.

- *Broadcast success to reinforce wider networks*

It is not only in terms of the make-up of the team members that culturally diverse projects bring key advantages to problem-solving in global marketplaces; their networks are also vital. So, as the project moves towards its final stages, it is critical to communicate the success of the project to the members' networks, in order to increase interest and engagement in contributing to outcomes.



Consolidation stage: the phase in a project when the partners have worked together long enough for trust to have grown in each other's capability, for warmer personal relationships to have developed and for the pattern of meetings to have become settled.



Case Study 4 – The Consolidation Phase

In the eChina-UK project, opportunities for accepting differences and showing sensitivity to others' needs were sometimes exploited and at other times missed.

Several of the eChina-UK project teams were large, involving up to 35 people (including senior managers etc). So for these large projects, establishing effective communication networks was important, such as deciding who should be kept informed about what issues. It was not appropriate to waste people's time with issues that didn't concern them, yet it was important that they felt involved and updated on developments. It was also important to handle people's concerns about status and face, and this entailed paying attention to possible cultural differences in communication protocols, especially when interacting with senior Chinese managers and academics. For example, one Chinese project manager commented to the British: 'Sending mass emails is a good way. But when we send such emails, it will infringe Chinese principles. If I send such an email to a higher position, s/he will feel offended...because it shows no regard for status differences between people. Some superiors dislike equality, so the best way to communicate with them is to submit a report, whether in written or oral form'. This issue was never satisfactorily explored at the Initiation phase nor resolved at later stages when greater mutual understanding had been established. Another Chinese interviewee commented 'We should have embedded communication mechanisms in the project at different levels'.

After about 18 months of working together, the British and Chinese project partners decided to hold a cross-project workshop that would be attended by representatives of all the projects. Just as they were arranging this, the Programme stakeholders (the Higher Education Funding Council for England, HEFCE, and the Chinese Ministry of Education, the MoE) asked for a showcasing in China of what had been achieved so far. The members thus set about planning this collaborative event. The British members first drafted some preliminary ideas and sent them to the Chinese. This involved a very intensive three days, with one day focused on stakeholder speeches and two days on open-ended discussion sessions in smaller project teams. The Chinese members suggested a number of

significant modifications to this initial plan, which focused more on showing respect for status and expertise for stakeholders, and a need for more formal socialising. The modifications included

- More speeches from the stakeholders
- Elimination of the general discussion sessions and replacement with named speakers for all sessions on all three days
- Inclusion of half-a-day's sightseeing

The UK team were at first surprised by the formality of some of the proposed changes, but were willing to accept the need for an appropriate style of event within a Chinese context. Everyone realised that, despite working together for quite a while, they still needed to understand more about each other's preferences and protocols for organising events like this.

The workshop was held in Beijing, and arrangements were planned to the last detail. A large banner, announcing the event, was erected outside the building and the room itself was decorated magnificently with another banner and with flowers. Large, heavy boardroom-type tables were arranged in a U-shape and each member was provided with a specific seat and name-place. Speeches and presentations were given from a podium at the front, and the whole event was video-recorded. The British were again at first uncomfortable with the formality of the arrangements as they felt it would prevent them finding opportunities to raise certain issues that were concerning them. However the meals and tea breaks proved a good opportunity for informal interaction, and certain issues were discussed and resolved without needing to bring them into the formal meetings themselves. The British were thus happy to adjust their approach to communication and group interaction accordingly. Senior representatives from HEFCE commented very positively on the friendly atmosphere throughout the event, and could sense the genuine camaraderie that had developed among all the project members. Both the stakeholders and project members realised that this event, by bringing all sides together and investing in social as well as professional time together, had helped build a climate of trust that would move the projects on to a successful conclusion.

Commentary

Three project activities that are critical to the consolidation phase and that are illustrated in this case study are:

- a) *Consolidate procedures* – at the later stage of certain larger projects, the UK team members (despite greater mutual understanding) still had difficulties finding culturally appropriate ways of managing communication networks that took the needs of senior Chinese stakeholders into account.
- b) *Communicate achievement and celebrate success* – the Beijing event was specifically designed to bring all the projects together to showcase what had been achieved so far. The contribution of the two cultural parties to the planning of this event showed that they held very different concepts as to how to present and further develop their achievements.
- c) *Sustain context-rich communication* – The decision to bring people together face-to-face from across all three projects, and with some social events and sightseeing trips written into the programme, was clearly an opportunity to deepen communication networks and build the levels of personal trust necessary to sustain the project through the rest of its initial life cycle. HEFCE, a key stakeholder, sensed the camaraderie that the event had helped to promote and, along with the project members, saw a stronger climate of resulting trust that would help the projects meet their goals.

Look at the Resource Section for a full list of competencies relevant to this stage.

Here are some competencies that connect to the case study and support the activities:

- a) *Consolidate procedures*: ‘Communication management’, ‘interpersonal attentiveness’

The practice of sending mass emails, which displayed a lack of sensitivity to the cultural values of the stakeholders of one of the partners, certainly failed to promote effective communication between the two sides. It clearly showed a lack of sufficient attention to establishing culturally appropriate communication networks (an aspect of ‘communication management’). Here, delivering personalised reports to senior people would be a mark of respect in a society where signalling social status and showing respect for hierarchy is often more critical than in the UK. In terms of relationship-building, the use of one-size-fits-all in terms of communication clearly may have failed to meet the Chinese need to ‘give face’ to senior people (an aspect of ‘interpersonal attentiveness’) and thus reduced the potential for buy-in and commitment from the stakeholders concerned.

- b) *Communicate achievement and celebrate success*: ‘Acceptance’ and ‘stylistic flexibility’

Despite differences in ideas as to how to organise things, the cross-project workshop itself was a great success. The qualities exhibited before and during the workshop by the UK participants helped to prepare the way for the sense of camaraderie that followed. In agreeing to the revised Chinese agenda, despite discomfort with its seeming high level of formality, the UK side showed at the planning stage that they were willing to consolidate the relationship by positively accepting behaviour that was



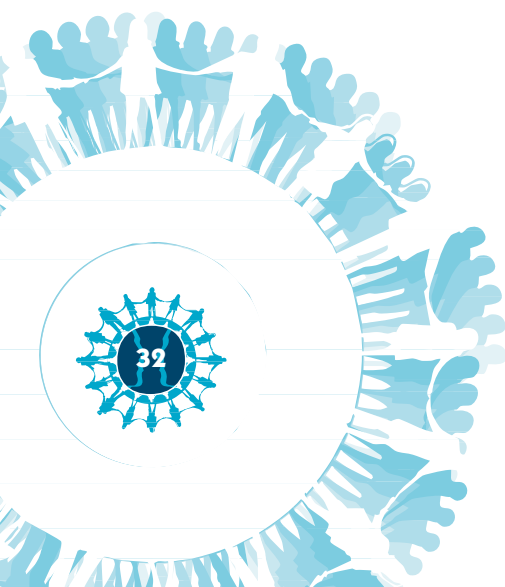
different from their own (an aspect of 'acceptance'). At the event itself, again despite initial reservations, they adapted to the formality of communication, and benefited from the socialising and other informal moments to discuss more openly some of the issues that concerned them. They showed a willingness to develop their normal repertoire of styles in order to adapt to, and profit from, being in a different cultural context and with a different audience (an aspect of 'stylistic flexibility').

c) *Sustain context-rich communication: 'Rapport building'*

In order to build deeper trust in consolidating the work of an international team, it is necessary to focus strategically on relationship-building. The decision made by stakeholders and the Chinese hosts in organising and arranging a large-group event with an important focus placed on sight-seeing and socialising showed a strong commitment to building connections on a personal as well as professional basis (an aspect of 'rapport building').

Key tips

- 1) Find synergies that get the best out of what each cultural party has to offer. This involves drawing on the maturity of the relationship in order to articulate and validate the different skills and areas of expertise that the different partners bring. Then, whether this involves the organisation of an event or the creation and distribution of a product, ensure that both approaches are integrated in finding the best solution to the challenge that is being faced. There is a sense that high degrees of 'accepting' others, though an important quality in building trust, can sometimes work against ensuring that your own needs are also met. Thus, in the case-study, the UK side went into the showcasing event without a clear idea of how their need for discussing certain open issues would be met by the process they had agreed with the Chinese.
- 2) In solving potential areas of conflict, be ready to telephone those you have personal relationships with in order to 'sound out' the challenge you are facing. Do not rely on resolving issues and brainstorming solutions in public forums such as emails and group meetings. Sounding out the issues beforehand allows more time for group reflection. It also shows sensitivity to the needs of those who are handicapped by language problems and sensitivity to face by cautiousness in airing concerns in public.
- 3) Where possible, avoid changing personnel on projects at the consolidation phase. This can reduce the capacity for building the deeper relationships needed to sustain momentum and enhance productivity at this critical stage of the project life cycle. Where a change in personnel is unavoidable, ensure that the outgoing team member helps in the hand-over process and that the new team member is carefully briefed about the people as well as the task. Make sure that when the new team member is introduced to the international partners, the benefit they bring to the team in terms of experience as well as technical skills is made explicit.
- 4) Find out ways that you can support the other cultural party to communicate the success of the project to their stakeholders.



- 5) Remember that in other cultures such as in China, people move to deeper levels of relationship by seeking out and giving personal favours. This is perhaps less common in the UK. Thus be ready to bring your Chinese partners small gifts or help them with small favours that reveal your sensitivity to their personal needs, likes and interests outside work.
- 6) Be proactive in actively participating in and appreciating the hospitality offered you by your international partners as this may be a key symbol of deepening relationships. Remember that you too will be expected to return similar levels of hospitality if the event happens in the UK.
- 7) Reaffirm and deliver on goals despite pressures to compromise. At later stages of a project as the relationships with international partners become stronger, and the opportunities provided by widening networks become more wide-ranging, it can be easy to lose sight of the goals you have agreed to deliver.

Two tools for ongoing self or team development:

- **Tool 2: Partner Review**
- **Tool 4: Communication Review**

See the Resource Section





Section 8: Stage Five: Transfer

Transfer stage: the final stage of the project where the participants agree on the likely outputs, the channels of dissemination and how the collaboration can be continued in the future.

Main activities in this stage

- *Define the project direction: terminating; re-convening; institutionalising*

In international projects where team members are dispersed across different geographical locations and organisational contexts, there is a danger of losing momentum at the transfer stage if there is no sense of a future in the relationships that have developed. Stakeholders need to work closely with project teams in defining a way forward that sustains energy and productivity.

- *Review the collaboration: establish how to close the project without closing the relationship*

One of the key achievements for any international project is to overcome barriers to integration and effective communication in delivering on their goals. When effective teams are reaching the end of their life cycle, it is critical to review the project in terms of the collaboration achieved, and find ways of sustaining the relationship and trust between team-members for other future purposes.

- *Reflect on the cultural learning and acknowledge the social capital created*

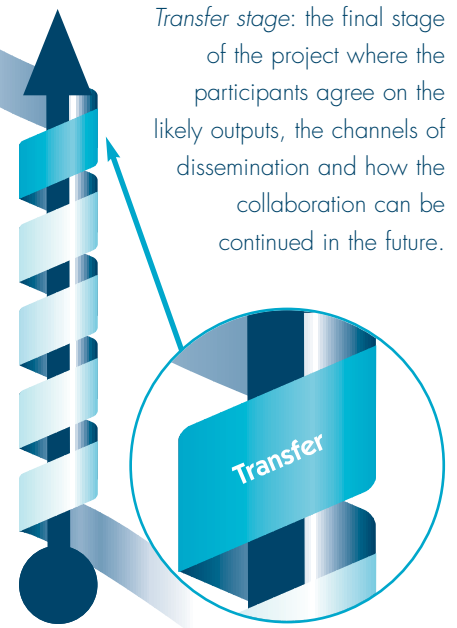
To secure higher levels of trust and productivity, international project teams also need to manage the impact of cultural diversity on team dynamics. When international project partners recognise, value and learn from the differences between them, the resulting resource can be as important to their organisations as the products they develop.

- *Identify diverse modes of transferring learning into the wider organisations*

Culturally diverse teams made up of team members from varied organisational backgrounds often have very different needs as to how the learning from the project is distributed back into their working contexts. When these are made explicit, new creative opportunities can emerge for all parties for extending their collaboration.

- *Celebrate and disseminate the formal outcomes*

If it is hard to find time and opportunity to celebrate project outcomes for teams working side-by-side in the same cultural context, it is even harder for international teams distributed in different geographical locations to do so. It is, however, important to find an appropriate way to thank people for the efforts made (often in the face of considerable challenges) before disseminating the formal outcomes to key stakeholders.



Case Study 5 – The Transfer Stage

When the eChina-UK Programme was first established by the Higher Education Funding Council for England (HEFCE) and the Chinese Ministry of Education (MoE), the Joint Steering Committee planned to run two phases of projects, with the potential for new partners to be brought in at the second phase. As Phase 1 moved to its conclusion they needed to define the role of the already-established project teams within the next phase of the programme. In reflecting on how time-consuming and relationship-intensive international projects of this kind are, they decided to allow the teams involved in Phase 1 projects to bid for further money to extend their collaborations and to draw out deeper learning in Phase 2. Three further projects were funded in Phase 2, and each brought in new partners in Britain and China – partly to incorporate new expertise, and partly for cascading and dissemination purposes.

At this transfer stage of the eChina-UK programme, all the partners in each of the projects had to sit down to consider their transfer strategy. They needed to reflect very carefully on what they should disseminate, to whom this would happen, and how they would achieve this. As far as the ‘what’ issue was concerned, there were a large number of possibilities; for example, sample e-learning courseware, downloadable technical tools, insights into the pedagogy of e-learning design, insights into the e-learning development process, collaboration processes in international projects, collaboration processes in e-learning projects, and so on. Here the dissemination strategy needed to take into consideration the culturally diverse context in which the UK and Chinese partners operated. One chief distinction that had emerged between the Chinese institutions and their UK counterparts was the much higher levels of autonomy enjoyed by the latter. For many of the Chinese institutions, involvement in eChina-UK was driven by their Ministry of Education’s strategy on e-learning and was not always linked to a particular research interest or expertise within the university itself. Consequently, transfer activities tended to be heavily focused on the use of the materials and courses developed within the programme which met the perceived need for e-learning provision in China. Thus, although many strong relationships had been developed between the UK and China, the focus of the final phase often had to be quite different. As one UK participant said of his Chinese colleagues: “They worked from products, we worked from ideas.”

One key aspect of diversity impacting on dissemination was the level of importance given to the eChina-UK project within the strategy of the partner universities. For two UK universities, the link with a prestigious Chinese university was of great strategic importance, and so the projects received a great deal of encouragement and internal showcasing. In one of these cases, project directors were appointed to senior-level committees and/or invited to share their experiences of international collaboration, and to showcase their outcomes to a wide range of senior staff. This involved some positive insights into the benefits that the Chinese partners brought to the project, and how they had reconciled their different approaches to working effectively together. The project team was also able to take the materials developed with their Chinese collaborators and pilot them with another of the university’s partners in Malaysia, thus testing the generic transferability of the material and using the project to extend academic collaborations.

In one of the eChina-UK projects, the UK and Chinese partners followed broadly common strategies concerning ‘what’ they would disseminate but with considerable local variations as to ‘how’. The dissemination emphasis remained strongly on the materials developed. On the Chinese side, the lead partner sought to replicate the use of the e-learning materials with other universities in China; in the UK, the team identified new uses for the materials locally. For both sides the project brought new creative opportunities that hadn’t been anticipated before: some of the UK participants used the materials in teaching UK-based students; others were influenced in their decision to develop the teaching of Chinese as part of their department’s language provision.

Commentary

Three project activities critical to the transfer phase that are illustrated in this case study are:

a) *Define the project direction: terminating; re-convening; institutionalising*

The stakeholders of eChina-UK were proactive in defining a collaborative role for the project teams at the transfer stage between the end of Phase 1 and the beginning of Phase 2. By allowing them to bid for money to extend their work at Phase 2, some of the responsibility for the future of their project – termination or re-convening – was placed in their hands. They would bring in new partners to provide new opportunities for disseminating and institutionalising their work in other contexts.

b) *Review the cultural learning and acknowledge the social capital created*

The strategy decided on by the stakeholders at the transfer phase was clearly linked to an acknowledgement of the 'social capital' created in the projects. The decision to provide the opportunity for each project to re-convene rather than terminate was clearly a recognition of how difficult it is to recreate through new partners the relationships and level of trust experienced by existing partners in the programme.

This acknowledgement of social capital was also revealed in the dissemination strategy of specific partners. Thus the internal showcasing event with senior academic stakeholders adopted by the UK partner on one of the projects seems to be a clear recognition of the importance of explaining the process involved in successful international collaboration.

c) *Identify diverse modes of transferring learning into the wider organisation(s)*

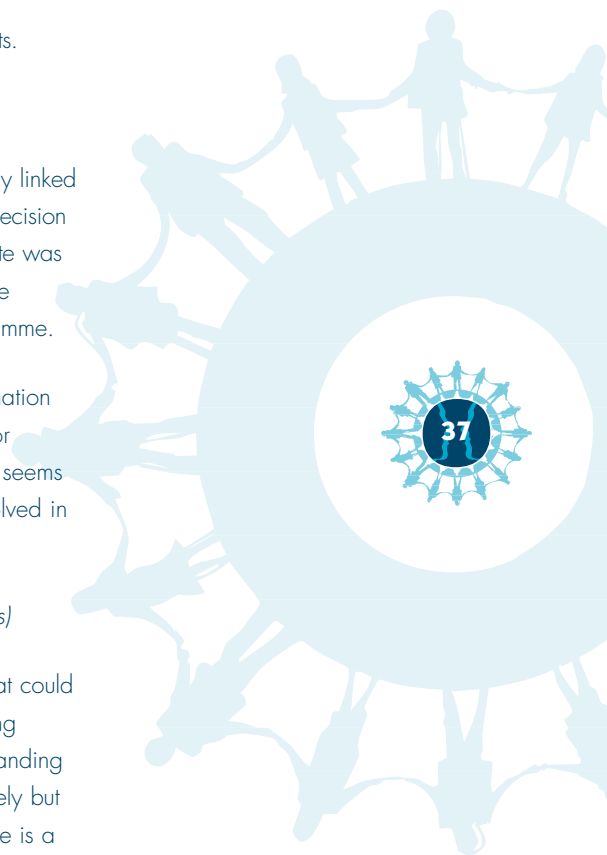
The case study offers a range of possibilities about the types of learning that could be disseminated from the eChina-UK programme, and suggests that differing cultural and organisational contexts may shape the choices made. Understanding and identifying these differences are critical for moving ahead collaboratively but with a sensitivity to the differences in focus that may result. Even where there is a common view of what needs disseminating, the final paragraph reveals the need for awareness about how the specific tactics for achieving this may be different.

Look at the Resource Section for a full list of competencies relevant to this stage.

Here are some competencies that connect to the case study and support the activities:

a) *Define the project direction: 'Rapport building'*

In deciding where to take the work done on the eChina-UK programme, stakeholders gave strong significance to the importance of the connections already built at a personal as well as a professional level in each project (an aspect of 'rapport building'). It seems that the attention given to building the warmth and friendliness of relationships within a project may not be so much a 'nice to have' but rather a 'need to have' element in gaining competitive advantage and securing long-term benefits for the project.



- b) *Review the cultural learning and acknowledge the social capital created: 'Acceptance' and 'synergistic solutions'*

The UK showcasing opportunities at one of the universities showed a willingness among project members, and a receptiveness among senior management, to reflect on people and process issues coming out of an international project. The attitude with which these cultural messages seem to have been communicated are important for revealing specific international competencies. The focus on the benefits brought by the Chinese to the project suggest both a positive acceptance of behaviour that is different, and a focus on looking for the best in others (key aspects of 'acceptance'). The focus on reconciling approaches rather than expecting the other cultural party to adapt to their way of doing things indicates that an effort had been made to find creative and integrative approaches to diversity (aspects of 'synergistic solutions').

- c) *Identify diverse modes of transferring learning into the wider organisation: 'Sensitivity to context' and 'spirit of adventure'*

The case study suggests that in sitting down to identify different modes of transferring learning, there needs to be an enhanced understanding of the different cultural and organisational contexts in which partners are operating. In terms of the relationships with key stakeholders both sides needed to be sensitive to differences between them in how organisational roles are perceived and the power relations associated with them (aspects of 'sensitivity to context'). In terms of finding new opportunities for transferring the learning, project teams from both sides were ready to move into unfamiliar situations, clearly at the risk of making mistakes (an aspect of 'spirit of adventure'). These situations involved extending partnership skills into new cultural contexts (the UK team with new partners in Malaysia) and offering new services in local markets (the China team beginning to use the materials with other universities).

Key tips

- 1) As a way of reflecting on cultural learning, ask each cultural group to present back to the team what they have appreciated about working with their international project partners and what in practical terms they would like to apply to their future working contexts.
- 2) As team members get to know their international partners better at an individual level, the focus on seeing others as pure representatives of a cultural group can often decrease. Take the opportunity at the end of the project life cycle to celebrate the contributions made by individuals. Ensure that this is an inclusive experience.
- 3) As part of the review of cultural learning, be ready to return to the ground rules that were agreed by the team earlier in their life cycle. Discuss how they may have supported the team in overcoming their communication and collaboration challenges. Be ready to discuss how any relevant tools or processes can be shared with other parts of the organisations involved in international partnerships.

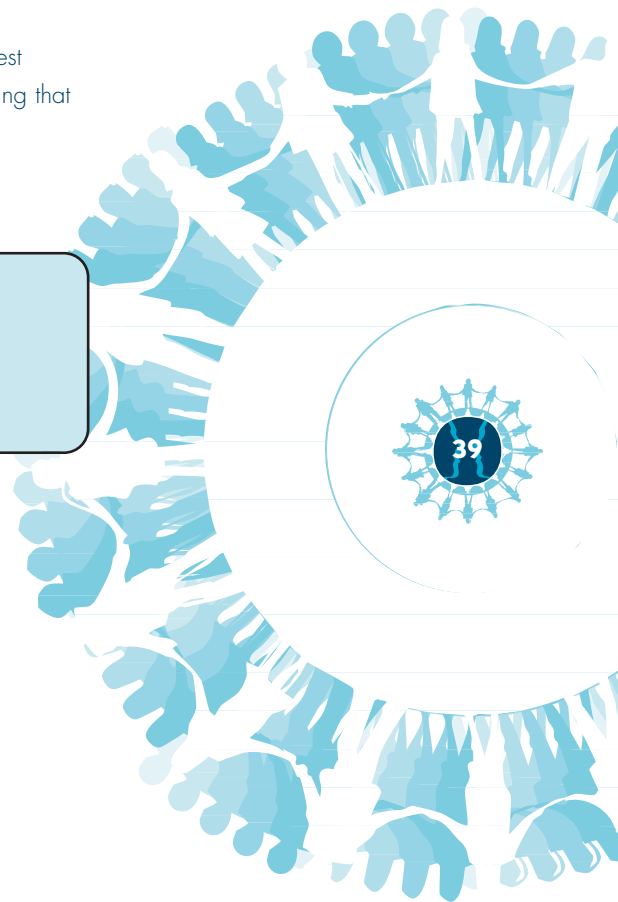


- 4) Ask each side to present or report on their dissemination strategy, and encourage ways that they can support each other in achieving this.
- 5) Look at the Mind Map tool (see Tool 6 in the Resource Section) to suggest some dissemination possibilities based on what happened in the eChina-UK Programme.
- 6) Invest personal time to make celebrations more meaningful. If at a distance, try to choose a channel of communication that provides a richer context of communication (e.g. video conference rather than teleconference).
- 7) Create a shared online space or website where the project outcomes, best practices and learning can be kept. Ensure that thought is given to ensuring that the text is available in the different native languages of the team.

A tool for self or team development:

- **Tool 6: Dissemination Mind Map**

See the Resource Section



Section 9:

The Competency Framework

In the previous sections, we have described and illustrated the competencies that link to the case studies and that support the activities, and we have referred readers to the Resource Section for a full list of competencies that are particularly important at each stage (subject to contextual constraints). In this section, we describe the competencies from a conceptual point of view, explaining the competency framework that we have developed on the basis of our research findings.

The competencies needed for effective intercultural interaction can be grouped into four interrelated clusters:

- Knowledge and Ideas
- Communication
- Relationships
- Personal qualities and Dispositions

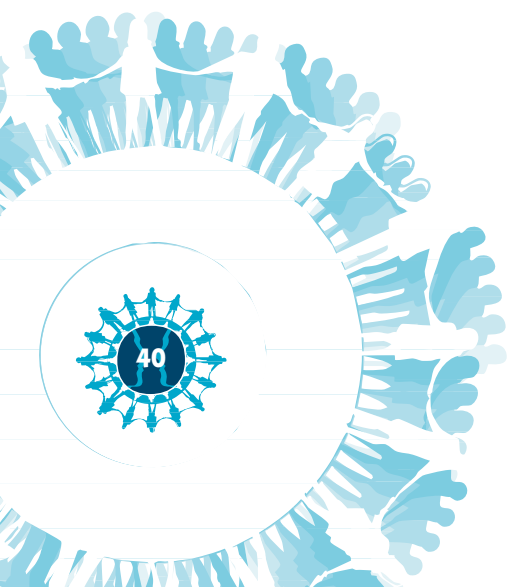
Knowledge and ideas

When working across cultures, there are special challenges to drawing the right conclusions about the behaviours, ideas and perspectives we see around us. We tend to see the world through our own cultural filters, particularly when working from our home culture and when we have little opportunity to immerse ourselves in other realities. When working with international partners, we can quickly misevaluate what we see, allowing negative stereotypes of others' behaviour to replace the need for positive, flexible thinking.

To achieve a greater ability to understand our international partners, we require a range of qualities. We need to be open to new ideas and ready to challenge our assumptions, and we need to avoid jumping to quick opinions about the behaviour we encounter (*new thinking*). In terms of our own behaviour, we need to be interested in how others' goals for the project may be different from our own, and thus seek to explore and take them into account (*goal orientation*). In specific national cultural contexts, we also need to be proactive in researching the national sectoral contexts, values and behaviours of the people we encounter (*information gathering*). In multicultural groups we need to share and surface the different perspectives people have about an issue in order to promote problem-solving and creativity (*synergistic solutions*).

Communication

One of the key resources we bring to building trust and mutual understanding with our international partners is the quality of our communication skills. We may have come to



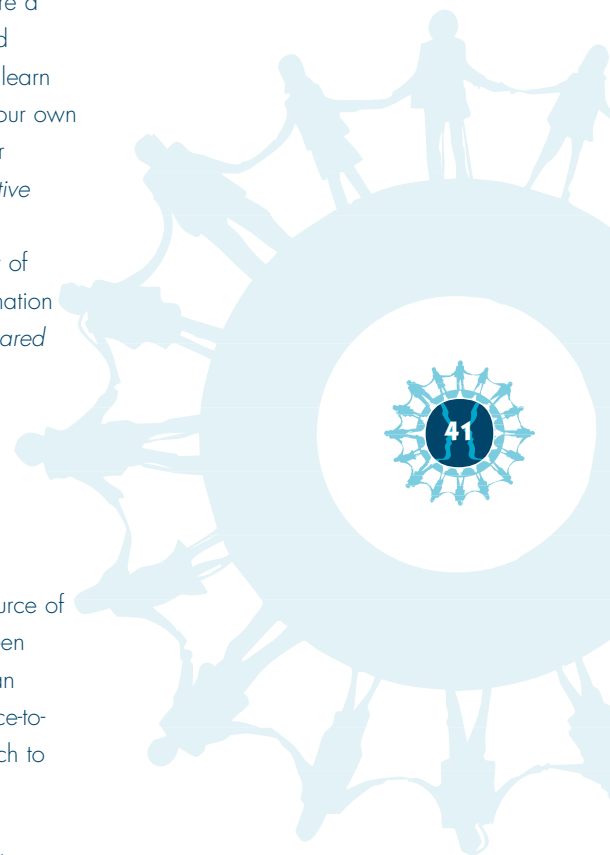
some useful initial conclusions about what they want and how they operate, but unless we can build on this through effective and appropriate communication strategies and skills, the potential for building shared meaning will be lost. Often international partnerships can be beset by misunderstandings based on problems in overcoming the language barrier as well as a failure to draw on the right mix of listening, speaking and perceptiveness skills in order to construct, explore and negotiate meaning. Often people underestimate the amount of background information that is required to be shared up-front to create a platform for mutual understanding, as well as the different styles needed for communicating effectively with their international partners.

To achieve greater ability to communicate with our international partners, we require a range of qualities. We need to be attentive to the choice of working language and communication protocols (*communication management*) as well as to be willing to learn and use the language of our international partner (*language learning*). In terms of our own communication skills we need to adapt our language to the proficiency level of our partner (*language adjustment*) as well as be more active and attentive listeners (*active listening*). We also need to become more skilled in observing indirect signals and interpreting them in the context of different cultural contexts (*attuning*). In the context of building and developing partnerships we need to disclose and elicit up-front information that is needed for mutual understanding and meaningful negotiation (*building of shared knowledge*). We also need to influence our partners appropriately and flexibly by drawing from a range of styles to get our message across (*stylistic flexibility*).

Relationships

When working internationally, trust can often be fragile and differences in cultural assumptions around key issues such as teamwork and hierarchy can often be a source of divisiveness rather than creativity. Research indicates that a lack of cohesion between people is one of the key factors that makes multicultural teams less effective. Thus an explicit focus on glueing people together becomes a need-to-have rather than a nice-to-have element, and a focus on task needs to be embedded in a pro-active approach to relationship-building.

To do this effectively we need to focus not only on the energy we put into relationship-building with specific partners, but also on the knowledge we have of the organisational and cultural context in which they operate and the attitudes we reveal in responding to the different behaviours they exhibit. We need to be pro-active in breaking the ice with new people (*welcoming strangers*) but then need to work hard to build and sustain the relationships we have created (*rapport building*). We also need to nurture relationships by being sensitive to the social as well as professional role that international partners have within groups, and avoid them losing face (*interpersonal attentiveness*). This entails understanding the hierarchical and power relationships they have in their own working context (*sensitivity to context*).



Personal qualities and dispositions

Working internationally also demands a range of personal qualities linked to emotional strength, sense of direction and adaptability. These qualities may be deeper-lying and slower to build, but they remain essential for pushing forward in unfamiliar settings while making others feel comfortable around us.

We need to have the motivation to seek out variety and change (*spirit of adventure*) while having a strong internal sense of where we are going (*inner purpose*). Emotionally we need to possess well-developed methods of dealing with stress (*coping*) as well as the ability to remain positive when things go wrong (*resilience*). We need to accept positively different behaviours that may go against our sense of what is normal and appropriate (*acceptance*). We also need to be conscious that our own behaviour, while normal for us, may be considered strange in another cultural context (*self-awareness*). We thus need to be willing to adapt our behaviour to suit other cultural contexts, and sustain trust with key partners.

For more detailed information about these competency clusters, including case study examples of each component competency, please see the Global People website:
<http://www.globalpeople.org.uk/>



Section 10: The Learning Process in the Life Cycle Model

Why learning is important in the project life cycle

At the core of the Life Cycle Model there is the process of active learning. This indicates that participants in an intercultural collaboration must pay attention to the process of learning throughout the project: it is not just a matter for reflection and evaluation after the project is complete. Indeed, to put it more positively, proper attention to learning will enhance the likelihood that participants will develop appropriate intercultural competencies, function effectively as a team, and work productively with partner organisations. It is also more likely that individual team members will find their experience of the collaboration both enjoyable and valuable on a personal and a professional level. In this section we explain what it means to pay conscious attention to learning and to embed it as a value and as an activity in an intercultural project.

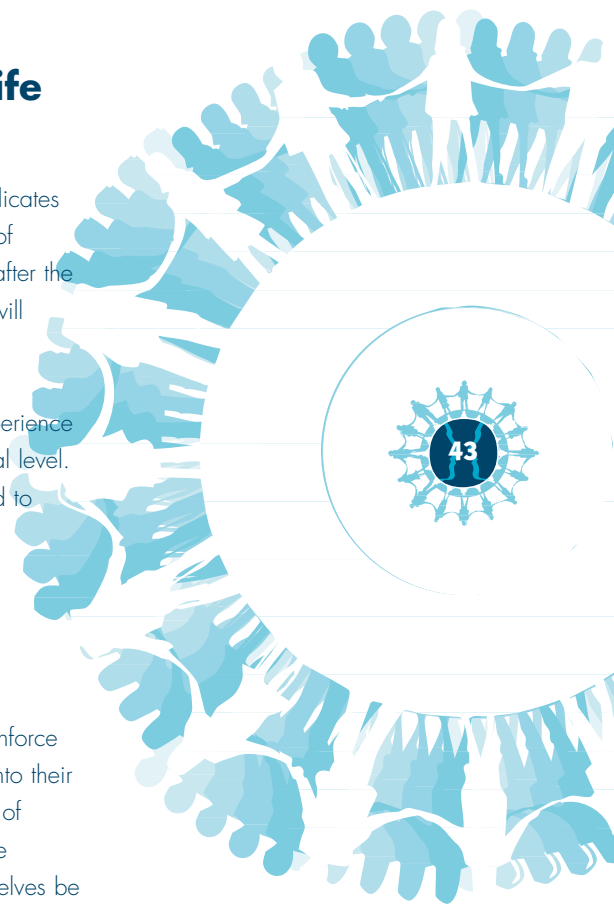
The role of learning in the intercultural partnership

Research into the process of learning has shown that the use of techniques that reinforce learners' abilities to reflect on their own experiences (and to factor that reflection into their future behaviour) will generate positive outcomes in terms of both the effectiveness of behaviour and the satisfaction, or engagement, of the learner. Of course, there are variations between individuals in their approach to learning (and these may themselves be culturally determined) but a positive attitude to supporting learning should improve the effectiveness of an intercultural collaboration. The approach that we recommend here centres on the conscious decision to build learning activities into the project life cycle in the same way that one would plan key meetings, deadlines for outputs or technology requirements. Many of the competencies that underpin the Life Cycle Model express this concern for openness, awareness, flexibility and an ability to respond sensitively to the complex experience of intercultural collaboration.

Acquisition – Awareness – Embedding

For the purposes of the Life Cycle Model, we have developed a simple formulation of the learning process that highlights three main stages: acquisition, awareness and embedding. The purpose of presenting the learning process in this way is threefold. It:

- i. emphasises the key stages that require conscious attention for effective learning;



- ii. provides a simple model to use in the planning and management of a project;
- iii. makes it easy to link the learning stages to the main life cycle stages and to the key intercultural competencies.

Acquisition. Initial cultural learning may be restricted to limited *knowledge acquisition*. It might consist, for example, of acquiring contextual information about the less familiar culture with which a team is working. This would be the basic background information gathered pre-project. Such information helps participants to understand something about potential collaborators but is unlikely to alter their basic perception of their own cultural 'make-up' or how intercultural collaboration works. Insights will also be constrained by the quality and nature of the information available to the learner. It will be an important activity during the Preparation stage of the project life cycle and this is reflected in the competencies highlighted for that stage in the category 'Knowledge and Ideas'.

However, although acquiring knowledge about cultural traits, values and systems is an important step in building effective intercultural performance, it is by no means sufficient to guarantee that performance. A process of self-examination and targeted learning is also required to develop the competencies that will make the individual more effective in a culturally diverse team. Chief among these is what we can term "awareness".

Awareness. This consists of two main elements: developing self-awareness and reflection on experience. Success in intercultural collaboration will be significantly influenced by the participants' ability to *develop self-awareness* both prior to and during the collaboration. This is highlighted in the selection of competencies within the Personal Qualities and Dispositions category. Self-awareness is supported by developing a habit of conscious *reflection on experience* and thereby learning actively from experience, which is regarded as integral to the learning process.

Using self-awareness to move beyond limited knowledge acquisition enables a more profound form of learning to take place. The participant uses both acquired knowledge and reflection on experience to question their own taken-for-granted beliefs and behaviours. The premises for their behaviour change as their assumptions are challenged, and they are able to become more interculturally effective by refining their understanding and ability to respond to the behaviour of others. The development of self-awareness and active reflection on experience may prompt learners to question and amend the assumptions on which their own behaviour is based.

Embedding. The first two modes of activity are situated primarily at the level of individual learning, but we are also concerned with *group and organisational learning* – the way in which project teams and their host institutions might share this individual learning and become more effective in managing intercultural collaboration. The link between individual and organisational learning is through the explicit sharing of learning and through co-operative reflection that enables the *embedding* of learning into the procedures, systems and cultural norms of the larger organisation.

Conscious and explicit learning during the project experience can be compared to a process of iterative evaluation that enables learning to be fed back into the performance



of the organisation. This means that the project team can adjust not only its future behaviour but also its procedures and systems. The changed behaviour of the project team can (with the right support) in turn impact the institution by recommending changes in systems, principles and priorities. Such changes will also, gradually, alter the culture of the institutions so that it may become more effective in its dealing with diversity. The expression we use to denote this is "Review, reflect, revise": in other words, build conscious review into the project activities; give people a chance to reflect explicitly on their experience; agree to revise behaviour on the basis of the team's shared learning.

How to use the Learning Process Model

i. Planning for learning

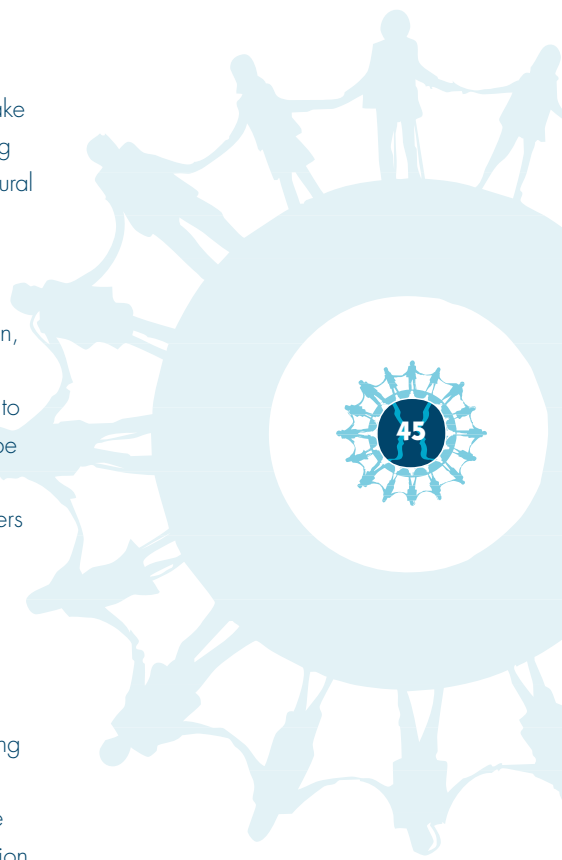
At an early stage of the project planning, the project director and/or manager should take into consideration the learning opportunities afforded by the project, the possible learning needs of the participants, and the activities that might be put in place to support intercultural learning during the project. Viewing the project as an intercultural learning experience is not just a practical approach; it is also a potential motivator for team members.

During the preparation stage, provision can be made for early knowledge acquisition, both through background research and through an initial sharing of experience and insights between the team members and their wider network. This, in turn, may help to influence team selection and pinpoint areas of knowledge and expertise that might be brought into the team. Planning the likely schedule and organisation of the project offers the opportunity to factor in time, opportunities and even frameworks for members to continue to share their learning.

ii. Building in reflection

The most important single action to take is to build in time for reflection: consciously allocating time in the project for participants to think about what they are experiencing and, where appropriate, to share that with others, will be a major contribution to project learning. Virtually every one of the intercultural competencies presented in the Life Cycle Model can potentially be improved through a process of conscious reflection on past performance.

Reflection can take place at the level of the individual, the team or the project partnership as a whole. For the individual, encouragement might be given to spend time reflecting on new intercultural interaction, perhaps to keep a diary to note these thoughts down. In one of the eChina-UK projects, there were a number of students doing research related to the project, and participants found it useful to be asked to share their reflections as the project progressed. At the level of the team, regular meetings are essential and it should be clear to members that there is space at these meetings to raise questions and challenges arising from their intercultural experience. One of the eChina-UK teams agreed that they would have an informal discussion within the UK team after every major meeting with their Chinese counterparts. Often this would happen fairly informally – over a hotel dinner or on the plane home – but it would be there as a planned opportunity to compare thoughts and consider adjustment to future behaviour. At the level of the project partnership,



effective shared reflection might take more time and resource to establish: it may be culturally uncomfortable for some participants; it will often require a degree of familiarity and even trust to have been established first. Nevertheless, as relationships strengthen in a partnership the value of allocating time to reflect together on the experience can be a positive contribution to the partnership's overall effectiveness.

iii. Sharing and embedding

The intercultural competencies that underpin the Life Cycle Model include a number that emphasise values such as flexibility, sensitivity and responsiveness in communication and relationship-building. The development of such competencies go hand-in-hand with an approach to learning that seeks to share learning actively within the partnership and to embed the outcomes of that learning in the practice and procedures of the partners. Although most international projects encounter a shortage of time and resources at some point, both medium and long-term benefit can be gained by identifying ways of putting new learning into practice not just within a single team but within the partnership and the partnership's institutions. This might mean holding feedback events, publishing review or evaluation studies, and finding opportunities to speak to key committees or decision-makers. It might also mean using the learning from the current project to endorse further international collaborations and enable them to be supported.

iv. Review, reflect, revise

This simple mantra encapsulates the process: project leaders need to plan review into the project life cycle so that mistakes, problems and successes can all be recognised and acted on as promptly as possible and with the involvement of other team members. The process of reflection supports effective review and encourages involvement. The objective should always be to revise behaviour if required and, perhaps, also to revise assumptions and 'taken-for-granted' knowledge: active learning can be a process of testing assumptions against experience and developing more sophisticated attitudes and behaviour.

A tool for self or team development:

● Tool 5: Six Steps to Effective Team Learning

See the Resource Section



Section 11:

Using the Life Cycle Model in practice

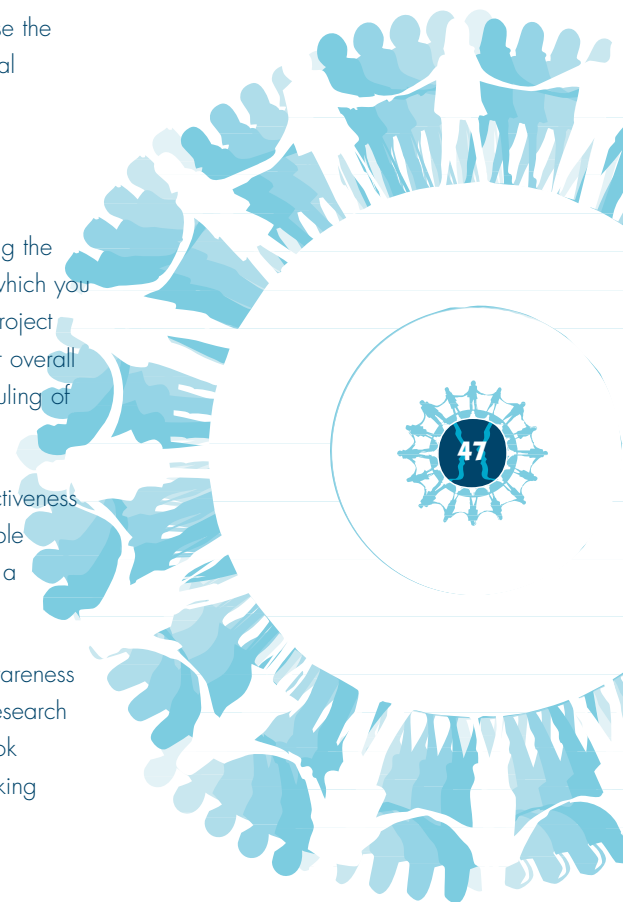
Throughout this Toolbook we have tried to demonstrate the practical applications of the knowledge and techniques that have been presented. In this section we summarise the four main ways in which the Life Cycle Model might be used within an intercultural collaboration.

i. As a pre-project planning tool

- **Action planning** – the Life Cycle Model provides a template for planning the process of an intercultural collaboration. It shows the main stages through which you might expect to pass and suggests activities for each of those stages. For project directors and managers, the model can thus be a tool that will support their overall project planning and help to focus thinking about the structuring and scheduling of the project.
- **Team selection** – the competencies required to support intercultural effectiveness can be a valuable aid in team selection: whether you are identifying possible project colleagues from an established group or recruiting to specific roles, a consideration of intercultural skills can strengthen the team.
- **Background research** – at the earliest stage of the project's life an awareness of the potential challenges arising from cultural diversity should shape the research and preparation of the project team. The examples provided in this Toolbook illustrate the kinds of knowledge that may be valuable in preparing for working across cultures.

ii. As a team development tool

- **Identifying competencies** – when a team has been selected (or even if you have little choice about the composition of the team), it can help to review what competencies the team possesses. Carrying out an 'audit' of competencies at the beginning will help all team members to know each other better and may reveal expertise and experience in colleagues that others were not aware of. Using the intercultural competencies can provide a framework and focus for undertaking this exercise and thus be a stimulus to pooling expertise in the group.
- **Planning training and development** – discussing the competencies ideally required for effective intercultural collaboration will help project leaders to identify any training that team members might need before or during the project. It might, for example, be worthwhile providing some language training for all participants; offering team members additional IT training to handle remote working, or supporting key staff to build their skills in chairing meetings or negotiating agreements.



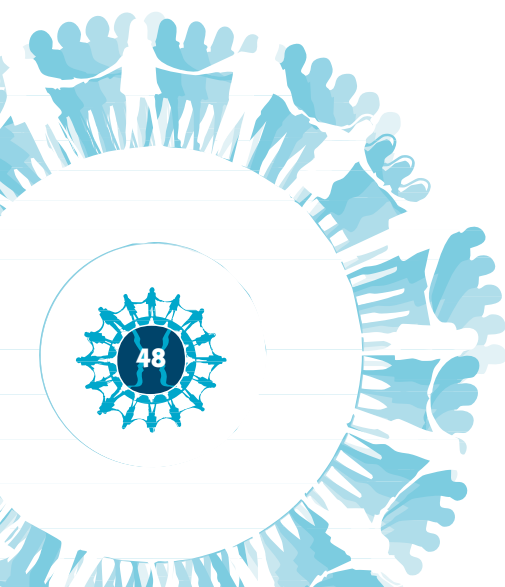
- **A focus for team-building activity** – having a shared body of information (in this case the Life Cycle Model) provides a way of creating a common language and set of ideas for the project team. Looking at each stage of the model together can help to encourage team discussion and recognition of shared goals, responsibilities and interests.

iii. *As a focus for review during the project*

- **Touchstone for good practice** – the Life Cycle Model provides a structured guide to each major stage of a project and detailed advice on the competencies needed to be effective across cultures. As a project progresses, the contents of the model can be used as a reference-point to compare actual practice against the model's recommendations. This may help to identify and clarify problems that are arising, but it may also help the team see where they have found new or different ways of doing things that have worked for their own project.
- **Resource bank for reference** – in its simplest form, the model can act as a resource bank when team members need to know more about issues arising in their partnership: the full descriptions of the competencies, for example, may help you learn more about challenges such as understanding hierarchy or giving colleagues "face"; the examples provided may offer helpful parallels to the project's own experience.
- **Link to learning process** – within the model, we emphasise the importance of reviewing the team's cultural learning and, again, the model itself can be a focus for this review. Using the schema of the Learning Process, participants can agree on key review points and methods of reflecting on their learning; following the main phases of that model, the team can discuss and plan their own learning and dissemination strategies.

iv. *As a framework for evaluation*

- **Means of matching performance against good practice** – as the project progresses, the team or the funders may wish to undertake a more formal evaluation of the project's performance. In this context, the different elements of the Life Cycle Model can be used as a benchmark against which the actual performance of the project team may be compared.
- **Framework for capturing learning from project experience** – similarly, if cultural learning from the project needs to be assessed and captured for dissemination, the framework and categories of the model offer a simple way of doing this.
- **Framework for sharing learning with the wider organisation** – at the Transfer stage of the project, the model offers a means of organising feedback and observations from a specific project in a more generic way, thus making it easier to transfer cultural learning to other institutions, partners and stakeholders.



Resource Section



Global People Life Cycle Matrix of Activities and Competencies for Intercultural Partnerships

STAGE	PREPARATION	INITIATION	EXPERIMENTATION	CONSOLIDATION	TRANSFER
PROJECT ACTIVITIES	<p>Develop a vision – conceptualise the project and articulate objectives</p>	<p>Explore objectives and establish common ground</p>	<p>Test out initial agreements and procedures – recognise wider stakeholder interests</p>	<p>Consolidate procedures – harnessing improved mutual understanding</p>	<p>Define the project direction – terminating; re-convening; institutionalising</p>
	<p>Research the context – cultural, institutional and professional</p>	<p>Examine stakeholder interests – recognising cultural constraints impacting on priorities, buy-in & decision-making</p>	<p>Actively encourage reflection – share cultural learning with the wider team</p>	<p>Feed creativity through exploring differences</p>	<p>Review the collaboration – how to close the project without closing off the relationship</p>
	<p>Audit intercultural skills and experience – including language skills</p>	<p>Review resources and define roles and responsibilities</p>	<p>Revise collaborative systems and procedures</p>	<p>Communicate achievement and celebrate success</p>	<p>Reflect on the cultural learning and acknowledge the social capital created</p>
	<p>“Break the ice” – make contact and initiate relationship-building</p>	<p>Build personal relationships – develop a people orientation rather than just a task orientation</p>	<p>Maintain effective ongoing communication, and ensure engagement</p>	<p>Sustain context-rich communication – based on deepening personal relationships</p>	<p>Celebrate and disseminate the formal outcomes</p>
	<p>Review channels of communication – including choice of language</p>	<p>Agree ground rules for communicating – identify preferred modes for working together inclusively</p>	<p>Harness the networks – use the opportunity to access wider respective networks and utilise additional resource</p>	<p>Broadcast success to reinforce wider networks</p>	<p>Identify diverse modes of transferring learning into the wider organisations</p>

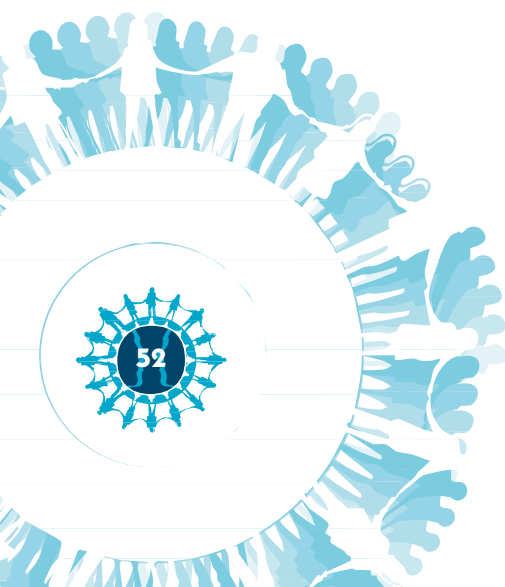


STAGES IC COMPETENCIES	PREPARATION	INITIATION	EXPERIMENTATION	CONSOLIDATION	TRANSFER
Knowledge and Ideas	<p>Information gathering – identify sources of cultural data</p> <p>New thinking – foster strong sense of curiosity, openness to new ideas, and willingness to challenge assumptions</p> <p>Goal orientation – identify local goals that are fixed and not open to negotiation</p>	<p>Information gathering – learn about unfamiliar cultures</p> <p>New Thinking – question assumptions and modify stereotypes</p> <p>Goal orientation – identify goals that are mutually compatible and beneficial</p>	<p>Synergistic solutions – ensure that different cultural perspectives are not suppressed but are used in problem-solving</p> <p>New Thinking – question assumptions and modify stereotypes</p>	<p>Synergistic solutions – find creative solutions that can reconcile different opinions/procedures</p> <p>Goal orientation – reaffirm and deliver on agreed goals despite pressures to compromise</p>	<p>Synergistic solutions – find creative solutions that can reconcile different opinions/procedures</p>
Communication	<p>Communication management – establish communication contacts, choose working language(s)</p> <p>Language learning – invest in learning words and phrases in other languages</p> <p>Language adjustment – adapt use of language to the proficiency level of the recipient(s) so as to maximise comprehensibility</p> <p>Active listening – check and clarify rather than assume understanding of others</p> <p>Stylistic flexibility – build repertoire of means to suit different purposes, contexts and audiences</p>	<p>Communication Management – choose communication modes for relevant purpose, agree communication networks, establish and agree protocols</p> <p>Building of shared knowledge – disclose and elicit key information and intentions (to help build trust and mutual understanding and to reduce uncertainty)</p> <p>Active listening – check and clarify rather than assume understanding of others</p> <p>Language adjustment – adapt use of language to the proficiency level of the recipient(s) so as to maximise comprehensibility</p>	<p>Communication Management – deal with communication problems</p> <p>Attuning – pick up meaning from indirect signals such as intonation, eye contact, body language and vague language, and draw inferences</p> <p>Building of shared knowledge – disclose and elicit key information and intentions (to help build trust and mutual understanding and to reduce uncertainty)</p> <p>Stylistic flexibility – use different language styles flexibly to suit different purposes, contexts and audiences</p>	<p>Communication Management – deal with communication problems</p> <p>Stylistic flexibility – use different language styles flexibly to suit different purposes, contexts and audiences</p> <p>Attuning – pick up meaning from indirect signals such as intonation, eye contact, body language and vague language, and draw inferences</p>	<p>Stylistic flexibility – use different language styles flexibly to suit different purposes, contexts and audiences</p>
Relationships	<p>Welcoming strangers – initiate contact and show interest in people from unfamiliar cultural backgrounds</p> <p>Sensitivity to context – understand power and role relations and how decisions are made in unfamiliar cultures</p>	<p>Rapport building – focus on personal relationship-building (to help build mutual understanding and trust)</p> <p>Sensitivity to context – understand power and role relations, and how decisions are made in unfamiliar cultures</p> <p>Interpersonal attentiveness – pay focused attention to individual sensitivities (e.g. status, competence, social identity)</p>	<p>Rapport building – exhibit warmth and friendliness – maintain and extend working relationships</p> <p>Interpersonal attentiveness – pay focused attention to individual sensitivities (e.g. status, competence, social identity)</p>	<p>Rapport building – exhibit warmth and friendliness – maintain and extend working relationships</p> <p>Interpersonal attentiveness – pay focused attention to individual sensitivities (e.g. status, competence, social identity)</p>	<p>Rapport building – focus on longer-term trust-building and relationship consolidation</p> <p>Sensitivity to context – understand power and role relations, and how decisions are made in unfamiliar cultures</p>
Personal Qualities and Dispositions	<p>Acceptance – positively accept goals, approaches and assumptions that are different from one's own</p> <p>Spirit of adventure – be ready to move into unfamiliar environments and deal with ambiguous situations</p> <p>Flexibility – be able to 'flex' behaviour and judgements in recognition of difference</p>	<p>Acceptance – positively accept goals, approaches and assumptions that are different from one's own</p> <p>Self-awareness – be sensitive to how one comes across to others</p> <p>Inner purpose – exhibit consistent values and beliefs rather than over-adapt to different ones</p> <p>Flexibility – be able to 'flex' behaviour and judgements in recognition of difference</p> <p>Coping – find suitable ways of dealing with stress, uncertainty and lack of control over certain situations</p>	<p>Acceptance – accepting of other people and no attempt to change them</p> <p>Self-awareness – be sensitive to how one comes across to others</p> <p>Inner Purpose – show determination to persevere and to achieve individual and collective goals</p> <p>Resilience – risk making mistakes and reflect on any mistakes in a positive way</p> <p>Coping – find suitable ways of dealing with stress, uncertainty and lack of control over certain situations</p>	<p>Acceptance – positive acceptance of behaviour and judgements that are different</p> <p>Inner Purpose – show determination to persevere and to achieve individual and collective goals</p>	<p>Acceptance – accepting of behaviour that is different and sense of enrichment from these experiences of different</p> <p>Spirit of adventure – be ready to move into unfamiliar environments and deal with ambiguous situations</p>

Tool 1 – Team Resource Audit

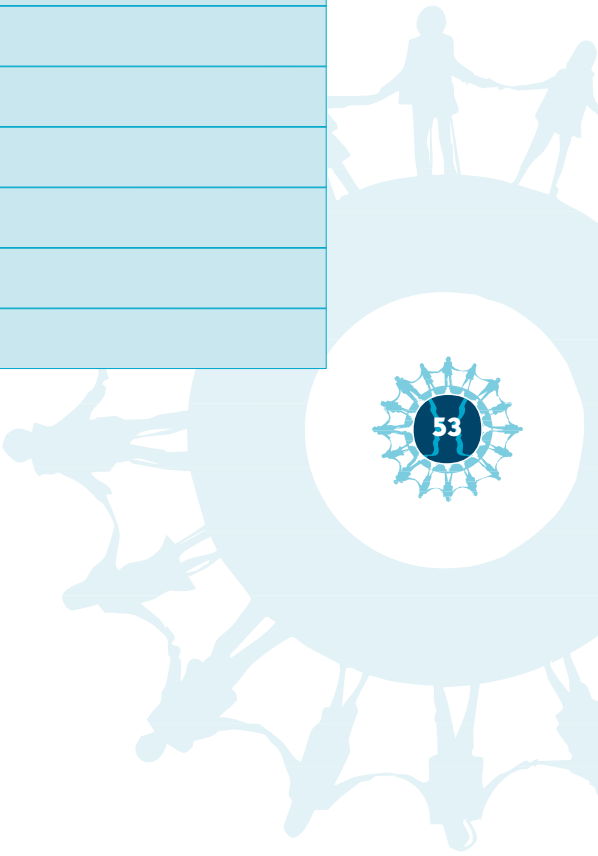
This tool can be used at the preparation phase of an international project as a way of reviewing the human resources available to the project. It will stimulate consideration of any possible gaps that may exist in terms of qualities required to build trust with prospective international partners. It can also be used by a recently formed local team as a way of identifying new potential team members and for identifying development steps for those already joined.

Categories	What do we need?	What have we got?
Language skills <ul style="list-style-type: none"> our ability to communicate in a lingua franca required in this project our ability to communicate in the language of a key partner resources we have for managing any linguistic gaps – translation services, etc. 		
International experience <ul style="list-style-type: none"> our past experience of working on international partnerships our experience of working with the specific national culture(s) involved in the project our experience of living and working outside our home culture 		
Motivation <ul style="list-style-type: none"> our motivation about committing time to the project and building relationships with new international partners 		
Flexibility <ul style="list-style-type: none"> our readiness to commit more time than may be currently anticipated our willingness to travel our preparedness to adapt project goals and outcomes to integrate the needs of our international partners 		
Personal qualities <ul style="list-style-type: none"> our willingness to push ourselves into uncomfortable and ambiguous situations from which we can learn our awareness of cultural factors impacting on our own behaviour, and on that of our partners our ability to adapt our style in communicating to be clearly understood 		



What actions do we need to take to fill the gaps?

ACTION	URGENCY
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	



Tool 2 – Partner Review

This tool can be used at the initiation phase of an international project to share understanding about what is currently known about partners, and what still needs to be discovered. It covers areas that are often a source of mistaken assumptions and a cause of low mutual understanding in international projects, and addresses where the gathering of specific information can encourage effective collaboration. The tool is also a useful way of reflecting on learning from a recent event, and focusing on specific avenues for future exploration.

About our partner (s)	Current understanding	Further areas to explore
1. Key objectives		
2. Anticipated outcome		
3. Function/status of individual partners within own organisation		
4. Relative status within the team		
5. Specific experience and skills of individual partners relevant to project		
6. Contacts/networks they are willing to share		
7. Stakeholders to whom they give critical importance		
8. Access to relevant information/resources/experience		
9. Level of prioritisation they give to project, and constraints faced		
10. Level of individual motivation		
11. Level of experience in working in international partnerships		
12. Key differences in the political, social and economic context in which they operate		

Tool 3 - 20 Tips for Building Rapport

In order to bring people closer together and to enhance communication in international project teams a focus on tasks needs to be balanced by a positive approach to relationship-building. A key competency required is 'rapport' which involves showing warmth and friendliness in building relationships, and a genuine concern for others' welfare. As one participant on the eChina-UK Programme put it: "Delight in each other's otherness."

Some of the ideas have been touched on in the tips given at each stage of the life cycle. However, this tool could be used by individuals, or a local team, at the early phase of a project to reflect on a range of practical ways of showing rapport and building trust with international partners.

1. Take the time to get to know people, get to know how they think, and try to understand their concepts and language.
2. Don't be scared to use spoken communication: some issues can be resolved on the telephone or face-to-face much more easily than via email, especially urgent messages, and confidential or interpersonal issues.
3. Make time for regular face-to-face meetings; aim for as much direct contact as possible not just for business purposes, but also for social bonding.
4. Visit the other's culture; it will aid your understanding of and appreciation for the people and practices of the partner's culture.
5. Keep good, regular contact with a designated and dedicated contact person at the partner institution.
6. Allow for exchange visits: these will not only foster relationships, but also enhance your understanding of organizational differences and procedures.
7. Show and reciprocate hospitality: this is critical for building deeper levels of trust and ensuring that task is embedded in relationship.
8. Show appreciation for kindness, effort and hospitality, e.g. by giving small gifts.
9. Use a cultural mediator to help smooth relationships and facilitate understanding.
10. Try and limit turnover of personnel during the duration of the project, as it hinders relationship and trust-building.
11. Be open about your institution's goals; this will eliminate suspicion and help partners to understand your actions better.
12. Accommodate your counterparts' language limitations to an appropriate degree especially when they are using your native language as the 'lingua franca'. (Remember – adapting too little makes it hard for them to follow, but over-adaptation is insulting)
13. Show patience at all times, with special attentiveness to maintaining composure in situations where a lot of clarification is required.
14. Show goodwill and respect by learning some key words and phrases in the other's language;
15. Include a native speaker of the partner's language in your team to help improve communication and understanding.
16. Work on a 'common language', for the project by agreeing shared terminology and ground rules for communication.
17. Ensure that you choose people for the project team who are genuinely interested in participating in the project and in collaborating with members of the given culture.
18. Actively listen by clarifying and negotiating meaning as this shows respect for differences in views, and the concerns that others may have.
19. Be ready to do personal favours for individual partners as a way of showing deeper and longer-term interest in the relationship.
20. Demonstrate that you are committed and can be relied upon by delivering on all the promises that you make.

Tool 4 - Communication Review (worked example)

Key Tasks	Key Channels							Minimum Frequency
	Face-to-face	Video conference	Telephone	Tele-conference	Teamware	report to team / individuals	Email ccs	
Regular Team Meeting	Best 😊	OK 😐		OK 😐				Monthly but face-to-face at least 2 x a year
Reporting progress within team					Best 😊	OK 😐		As agreed at team meetings
Report progress to stakeholders A, B and C						Best 😊 (for summary of phase)		At the end of each phase
Report progress to stakeholders D, E and F			Best 😊 (for changes to outcomes)				Best 😊 (for minutes of meeting)	Monthly after meetings & at other agreed times
Regular catch-up with team			Best 😊 (for individuals)		Best 😊 (for whole team)			1 or 2 times weekly
Urgent need for information			Best 😊			OK 😐		Schedule unstructured time
Events at key phases and milestones	Best 😊							2 x a year (one in each country)

Tool 5 – Six Steps to Effective Team Learning

The purpose of this checklist is to support reflection within a team during an international collaboration. Encouraging participants to reflect on their experience makes it easier to recognise the cultural learning that is taking place and to use that learning to shape the future performance of the team. In the Global People Life Cycle Model, this is summarised by the phrase 'review, reflect, revise': take time out to review progress on the project; reflect on the experience of working across cultures; revise behaviour if interaction has not been working as well as it might.

Step 1: Prepare the team

Make sure that, from the outset of the project, team members know that they will be encouraged to reflect on their experience and to share these thoughts with each other. This is never a competitive exercise; it is not about producing the 'right' answers to problems: it should be a relaxed and enjoyable way of learning from each other and improving the cultural experience for all team members.

Step 2: Plan review into the project schedule

Although spontaneous discussion of cultural issues can be of great value, the advantages of having a more structured review process include: the involvement of all the team members, the opportunity to capture key learning points and the opportunity to decide how to act on them. It helps to factor a series of review meetings into the project plan and, where possible, to schedule them to follow major events or milestones in the project's development.

Step 3: Select a focus for the reflection

Whereas some individuals find it easy and natural to reflect on their experience, others are less comfortable with the process: people whose learning style is strongly 'learning by doing' may resist anything that looks too much like 'navel-gazing'! The benefit of selecting a focus for reflection is that it provides everyone with a common starting-point and a concrete event to discuss. The focus may be a meeting with partners; a significant presentation or the pilot-run of a project activity. It may equally be a process that all members have experienced: managing email communication with another culture, for example.

Step 4: Set the scene for the meeting

Give colleagues time to reflect: let the team have plenty of warning of the time allocated for reflection and discussion. Ask everyone to spend a little time before that meeting reflecting upon the chosen focus. Make sure that the team meets in a comfortable setting and with a relaxed atmosphere – this should feel like an opportunity to talk informally but also to take decisions that will affect the project.

Step 5: Facilitate the meeting

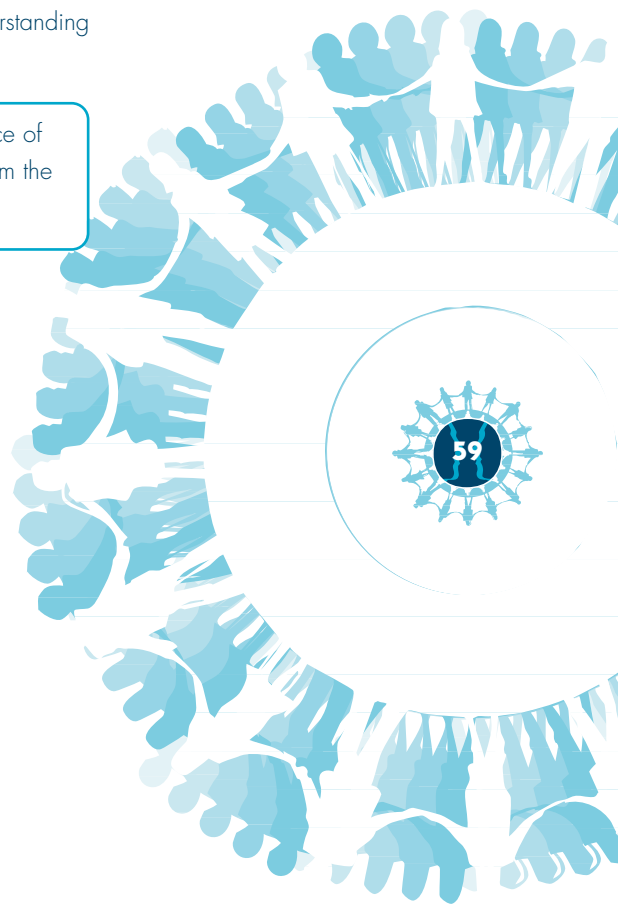
One member of the team should take the lead in the meeting to prompt discussion and also to capture the key learning points that emerge. This needn't be the team leader or the most senior person present: it may be a role that could circulate among the group or, perhaps, there is one person in the team who is recognised as a natural facilitator and could take the role with everyone's approval. This person, supported by the team leader, should also ensure that the cultural learning is turned into action: if colleagues have identified important challenges arising from the collaboration, then these need to be addressed by all the team and new modes of behaviour developed.



Step 6: Make learning sustainable

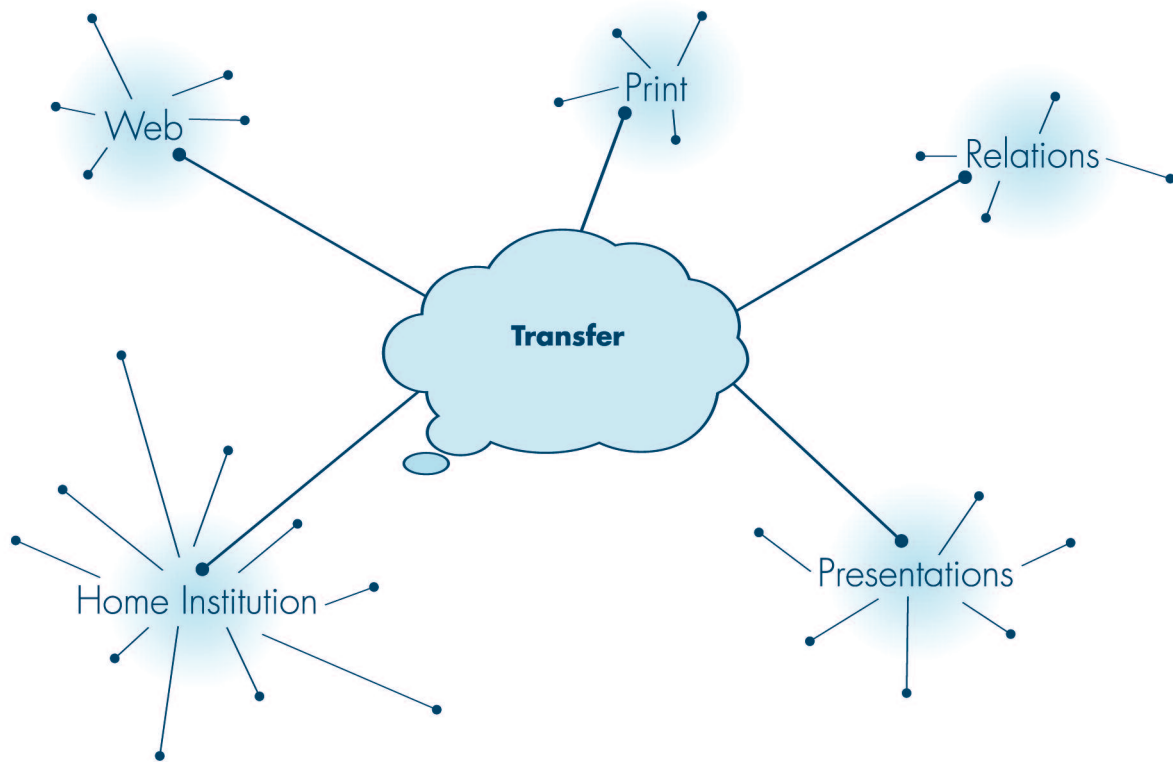
As far as possible these opportunities to reflect should feel like a natural part of the project 'flow' and be welcomed by the team as one of the tools that they can use to improve their own performance and the quality of their experience. It's important to maintain good communication within the team and to recognise how the sessions have helped the project to succeed. Don't treat each review point as a discrete event to be completed and discarded: encourage colleagues to recognise how their learning is developing throughout the project. Use some of the time to look back on earlier cultural assumptions that have changed and acknowledge that the group has become more sophisticated in the way it works. Another valuable activity can be to extend the reflection activity to take in project partners and to share cultural learning as a means of strengthening trust and understanding between the groups.

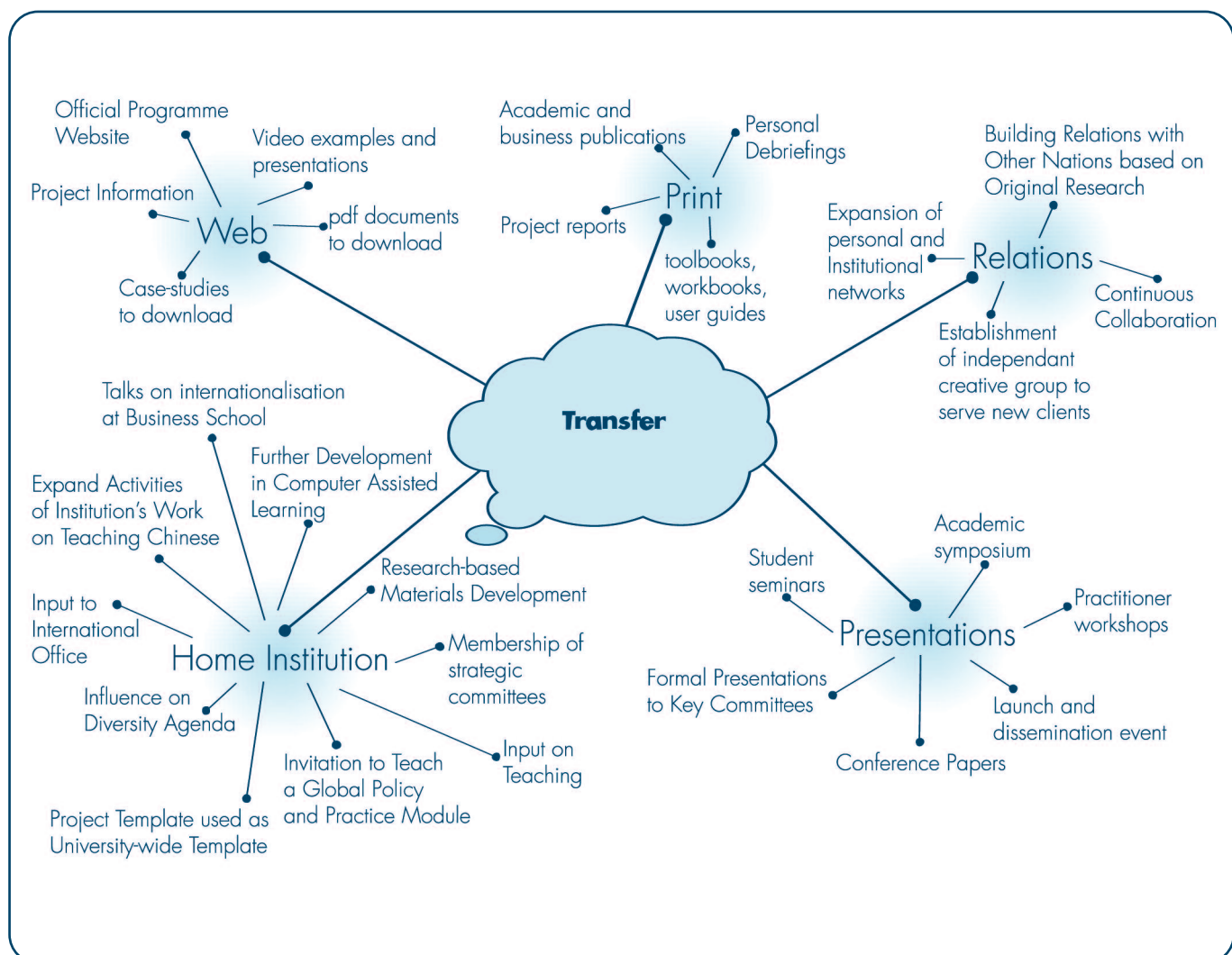
Learning is a tool which can improve project performance. It is also the source of personal development, positive team interaction and enhanced satisfaction from the experience of intercultural collaboration



Tool 6 – Dissemination Mind Map

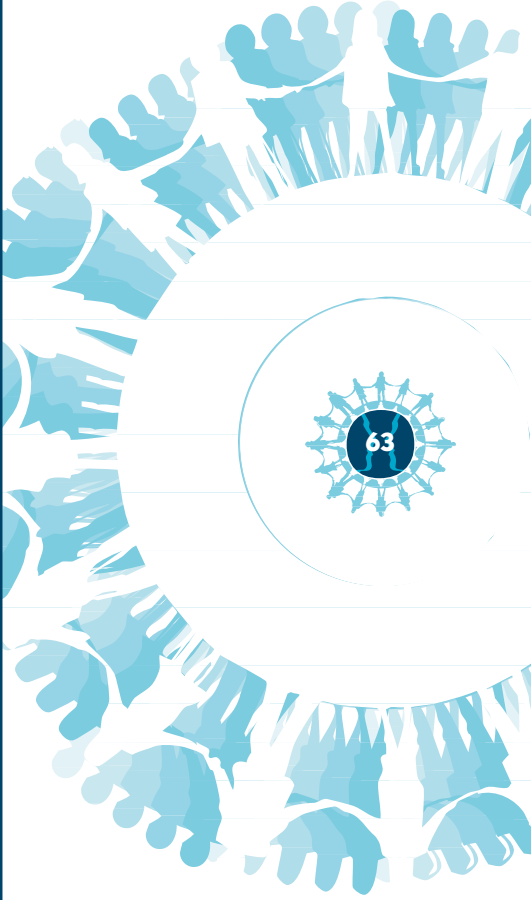
This tool can be used at the transfer stage of a project life cycle to identify different ways of disseminating the formal outcomes and learning from the project. It enables team members to brainstorm specific transfer activities around five strategic channels of dissemination – web, print, presentation, home institution, relations. A blank map is provided for customising to a specific international partnership context, plus a complete example given from the eChina-UK Programme. A particular benefit is gained by the different parties involved in a partnership to work on this brainstorming process together as they can learn from each other and find areas of synergy.

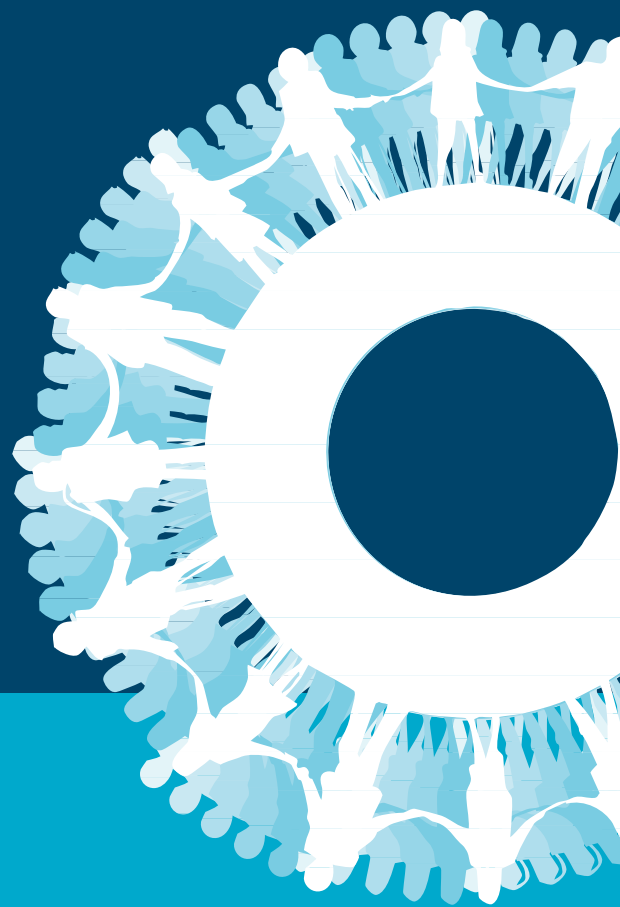




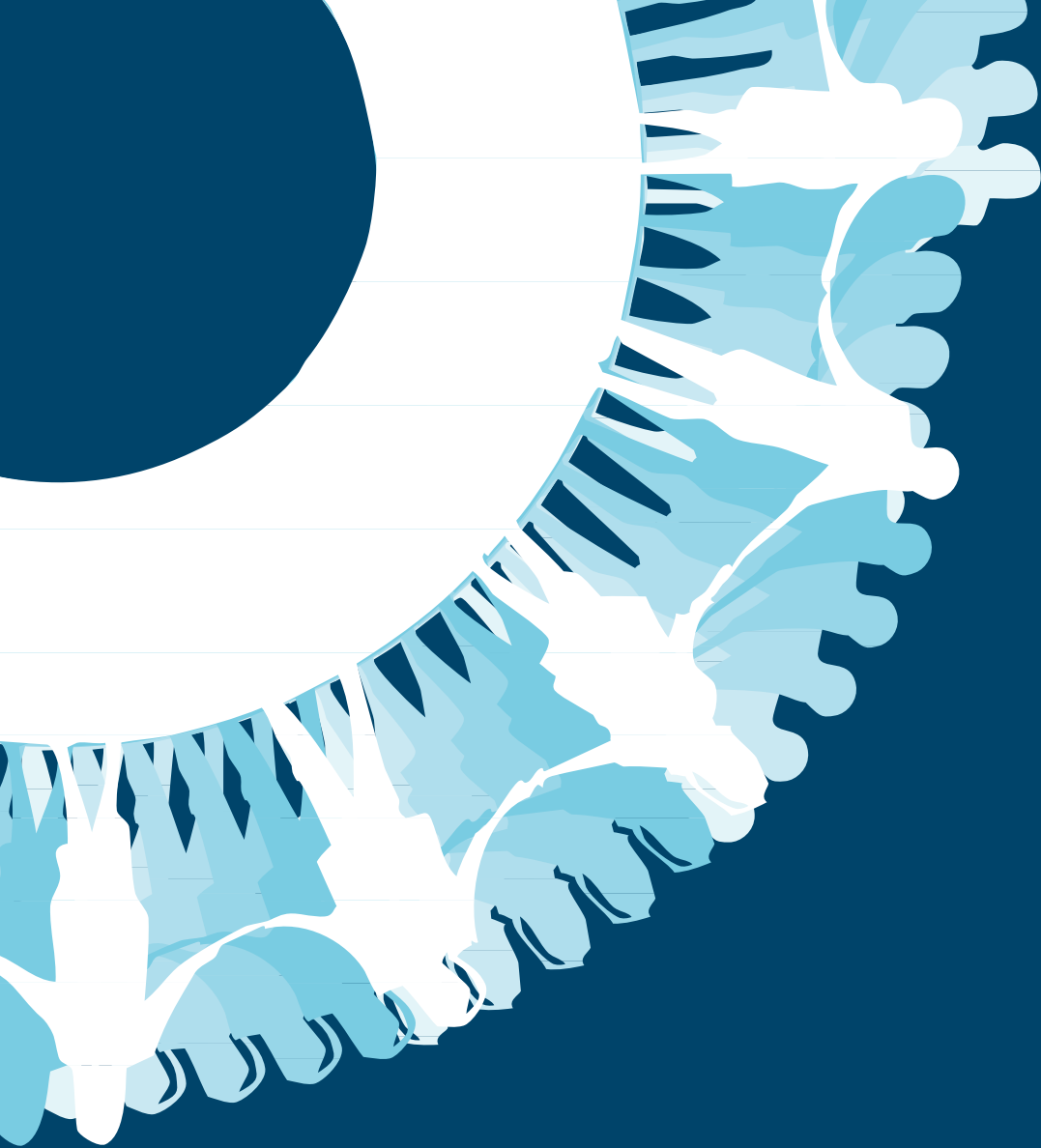
Notes:

Lined area for taking notes, featuring a large graphic of a sun with people silhouettes.





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