**TEAM CHARTER ASSIGNMENT**

A team charter is a document that describes how a team plans to work together to accomplish its goal(s). This helps get everyone on the same page up front, maximizing team performance and satisfaction and minimizing conflict. Your charter should be unique to your team because it reflects your individual personalities, strengths, struggles, and goals. Draw on your prior team experiences (in other courses and work settings) and our class discussion on working in teams.

Submit your typed and signed team charter through Canvas by [insert date here].

**TEAM OBJECTIVE**

Clearly specify team goal(s)—what does successful completion of the project look like to your team? Turning in the best team project that has ever been submitted in this course? Doing the minimum amount of work required to earn a B? Having fun working together as a team? Improving interpersonal communication skills? Developing skills in research?

**TEAM MEMBER ROLES**

Setting aside the particular content of the team project, what roles are important to the functioning of your team? Who should play those roles? In making these role assignments, think about your group’s collective natural talents and how you have used them to be successful on prior teams. Some possible roles are provided below. You do not need to include all of them and you can/should add roles based on your unique natural talents. Think creatively!

Team roles from the University of Minnesota, <https://teamwork.umn.edu/>, and the Eberly Center at Carnegie Mellon University, <https://www.cmu.edu/teaching/designteach/teach/instructionalstrategies/groupprojects/index.html>).

* Takes notes summarizing team discussions and decisions, and keeps all necessary records.
* Serves as liaison between team and the instructor.
* Keeps the team aware of time constraints and deadlines and makes sure meetings start on time.
* Raises counter-arguments and (constructive) objections, introduces alternative explanations and solutions.
* Strives to create a harmonious and positive team atmosphere and reach consensus (while allowing a full expression of ideas.)
* Makes sure team focuses on most important issues and common goals and does not get caught up in details.
* Seeks to uncover new potential in situations and fellow team members and explore new areas of inquiry.
* Encourages imagination and contributes new and alternative perspectives and ideas.
* Builds bridges and making connections among team members.
* Motivates the team towards the goal.
* Checks to make sure all team members understand the concepts and the team’s conclusions.
* Proposes concrete steps to transform ideas/plans into reality.
* Invites the views and opinions of team members who are not actively participating.
* Sets up timelines for tasks to keep the project progressing.
* Thinks through "what if" scenarios and communicates thoughts to the team in order to make better decisions.
* Diplomatically raises questions/issues to help solve conflicts or misunderstandings.
* Clarifies with the team the final outcome desired, then generates multiple ways to achieve it.
* Organizes aspects of the team's work that are complex and detail oriented.
* Facilitates team meetings, especially early on until others become comfortable doing so.

**TEAM MEMBER RESPONSIBILITIES**

Now turn to the specifics of the team project. “As a team, read through the assignment out loud and create a list of all of the separate tasks that need to be completed. **Don’t worry about who will do what now, just get it all written down on paper to divide up later.** Also begin listing the questions you have about the assignment. Discuss anything that is unclear.” (<https://teamwork.umn.edu/>)

Use the Project Task List template at the end of this document to list all of the tasks for your project (enter as many rows as needed). Then “decide who will do what and by when. Keep in mind each team member’s skills, experiences, and preferences when possible.” (<https://teamwork.umn.edu/>)

**TEAM POLICIES/NORMS**

How do we want our team to operate? What process guidelines will help us be engaged, satisfied, and successful? What potential barriers to the achievement of team goals do we need to address? As a team, develop a list of policies that you want to establish. To help you do this, some potential questions to consider are included below. You do not need to answer all of the questions and you can add your own. Focus on what is important to your team and make sure that every team member provides input and agrees with each decision.

Policies Agreement Guide template primarily from the University of Minnesota, <https://teamwork.umn.edu/>, with modifications based on documents from Stein and Hurd (2000) and the Eberly Center at Carnegie Mellon University, <https://www.cmu.edu/teaching/designteach/teach/instructionalstrategies/groupprojects/index.html>).

# Group Meeting Policy Questions

*Face-to-face meetings are important for group cohesion and success.*

1. How often should we meet and for how long?
2. How will we schedule meetings? (Try [Doodle](http://doodle.com/?locale=en))
3. Where will we meet?
4. How important is it to arrive on time? What should we do if someone is late?
5. How important is it to arrive prepared (i.e. everything done in advance, ready to get to work)? What should we do if someone is unprepared?
6. How do we deal with interruptions? What is allowed? Phone calls? Messages?
7. What is the best way to communicate with group members (e.g. email, text, phone call) (Try [GroupMe](https://groupme.com))
8. How do we inform each other if we are going to miss a meeting? What should we do if someone misses a meeting?
9. How will we exchange ideas (e.g., shared online documents)?

# Meeting Facilitation Policy Questions

*Dividing up meeting facilitation into separate leadership roles is recommended.*

1. Should we set an agenda for each meeting? If so, how will we set and follow the agenda?
2. How much participation do we expect from team members? What do we mean by participation? How will/do we encourage participation?
3. How do we deal with individuals who dominate, don’t participate, resist, are too noisy/quiet?
4. Should we end each meeting with assigned action items to complete before the next meeting?
5. How will we record what happens at our meetings and decisions that got made? How will these records be shared with the group?

# Decision-Making Policy Questions

*It is important that every team member is heard from before making your decisions*.

1. How should we make decisions? (Vote and majority rules? All must agree? One person decides?)
2. How does each of us typically handle disagreement or conflict? (Avoid? Fight for my way? Give in? Persuade?) How will we work through conflict as a team?
3. How will we ensure cooperation and equal distribution of tasks?

# Group Assessment Policy Questions

1. How often should our group talk about how we're doing?
2. How do we want to give each other feedback on the quality of work submitted or the team process? With a formal document? With a verbal "how are we doing as a team?" at the end of a meeting?
3. Do we want to include both self-assessments and peer-to-peer assessments?
4. How will we address non-performance in regard to our team’s goals, expectations, policies and procedures? What are the specific circumstances that would necessitate dismissing a team member? (Note: before a team member can be dismissed, two written notices must be provided to the team member and a copy must be given to the professor. The dismissal must happen by [insert date] at the latest.)

# Other Policies

*You may want to set expectations about quality of work that is expected, or what your group will do if a group member fails to follow one of the agreed upon policies.*

1. What quality of work is expected? How do/will we encourage quality?
2. How will we monitor our process and progress?
3. What are other issues that may have a positive or negative impact on our team that we need to address and establish group norms for?

**TEAM MEMBER SIGNATURES**

Each team member should read through the charter and make sure that you understand and agree with the details. Then add the following statement and team member signatures to the end of your team charter.

“We share these goals and expectations, and agree to these policies, procedures, and consequences.”

Team member signature

Team member signature

Team member signature

Team member signature

Project Task List

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tasks | Person(s) Responsible | Finish Date | Completed | Comments |
| [Examples included for illustration purposes only] |  |  |  |  |
| Select a topic | Everyone | 2/24 |  |  |
| Learn how to use the FASB’s Accounting Standards Codification | Everyone | Prior to 1st team meeting |  | Review resources provided on Canvas; then discuss at 1st team meeting |
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