ENGAGEMENT MANAGER STARTER KIT

March 2025

Version 6.18

Edited by: Uyen Dang, VP of Project Management

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WELCOME

Dear Engagement Managers,

Welcome to Endeavour and congratulations on being selected for the role of engagement manager (EM) on your upcoming Endeavour engagement.

The EM role is very critical to the success of the engagement. We have seen in past Endeavour engagements that the commitment level of the team members is highly dependent on your management skills early on in the engagement cycle. Spending a bit more time in setting up your engagement and reaching out to the team members early will go a long way.

Unlike other roles on the engagement team, an EM has the additional responsibility of setting a positive dynamic amongst team members and the client. This guide is designed to provide you with some ideas on how to get off the ground running prior to meeting your team for the first time. For the experienced EMs, please treat this guide as an evolving document of which Endeavour can leverage your experience by way of incorporating your additional insights for the benefits of future EMs. Besides a short checklist of suggested tasks, we have included some templates that may be helpful to you as you reach out to your advisor(s), team members and client.

Remember, the project experience is what you make of it. Your team is eager to dedicate their time and effort to learn and work with you for the next six months. Use your leadership skills to leverage not only the team's skills but also their interests. Early on in the engagement, speak to each individual team member and try to determine why that member decided to volunteer with Endeavour, and what she or he would like to learn from this engagement.

We also strongly recommend that you make it a priority to develop a written team charter in your first team meeting. We have created a list of questions that can help you do this (See Appendix K). This charter should be agreed upon by all team members, written out, and distributed to each team member. This document will help shape the way that the team works together, communicates, meets, and solves problems that will inevitably arise.

Finally, remember that we are here to support your project in any way we can. While we are tasked with ensuring that all projects run smoothly, we are also here to provide any support and assistance that you may need, including client issues, team issues, advisor issues, or simply being another person familiar with the project to bounce ideas off of. Please do not hesitate to reach out to us at any point via email at volunteer@endeavourvolunteer.ca.

We truly hope that you enjoy your project, and thank you for taking your valuable time to volunteer with Endeavour.

Sincerely,

Shahroz Ehsan
Vice President, Consulting Operations

CHECKLIST PRIOR TO ORIENTATION

You are receiving this guide ahead of the orientation session. Take this time ahead of the session, or within a few days after the session, to perform some key tasks:

The following is a checklist of activities sequenced in the order of priority:

- Reach out to your engagement advisor(s) to see whether you can chat with them prior to the first meeting; ask them how involved they would like to be (APPENDIX A: INTRODUCTION TO ADVISOR(S))
- Send communications to the team shortly after receiving the team information to introduce yourself (APPENDIX B: INTRODUCTION TO TEAM). You can use a survey to understand what each member would like to get out of the Endeavour experience (APPENDIX C: TEAM MEMBER SURVEY).
- Consider how much you would like to leverage your senior consultant for his/her past Endeavour experience as well as the possibility of him/her serving as a back-up EM role
- Start thinking about how would like to structure your team after receiving the completed team member preference survey before the first meeting
- Identify the resources available in the public domain to start off discussions/brainstorming sessions with your team at your first meeting
- Identify the Endeavour SME advisors who have expertise in your engagement area (https://sites.google.com/a/evcn.ca/knowledge-management/directory/subject-matter-experts-sme)
- Identify the possible collaboration tools that you may have access to: GoToMeeting, Join.me, Skype, meeting facilities, conference bridge, doodle (https://sites.google.com/a/evcn.ca/knowledge-management/resources/tools-and-space-for-collaboration)
- Set up project/consulting team website before the first training session if possible

AGENDA OF THE FIRST MEETINGS

First team meeting

- Send out an agenda for the meeting in advance (APPENDIX F: AGENDA OF FIRST & SECOND TEAM MEETING)

First client meeting

- Find out how many people will be involved in the engagement from the client's side
- Invite your advisor to the first client meeting. It will be important for the advisor to hear firsthand what the client's problems and issues are in order to review the statement of work.
- Determine in advance if projectors, conferencing solutions, etc. are available at the meeting location (if required)
- Suggested agenda (APPENDIX G: AGENDA OF FIRST CLIENT MEETING)
- Note: If the client requests a change of project scope from the initial Endeavour assessment, please contact your Project Manager. Endeavour will need to review and approve any changes to ensure projects remain within Endeavour's mandate.

SUGGESTED TIPS FOR RECURRING TEAM MEETINGS

- Organize a weekly or biweekly meeting that can be scheduled for the same time slot from week to week. This will help keep everybody on the same page with all the tasks and provides a good space to discuss any Endeavour business over the past week. These meetings do not need to be lengthy.

- Past experience indicates that these meetings work better if they are in-person. It may be difficult to organize a weekly in-person meeting, so make good use of the teleconferencing tools that are available. That being said; don't exclusively meet in the virtual world! Face to face meetings tend to be more productive and are better for team dynamics and team bonding.

- Start the meeting on time and do your best to run the meeting according to the agenda, which should be sent out at least a day before the scheduled meeting.

- Stay close to the agenda but remain flexible.

- At the end of the meeting, review all action items, including their deadlines and to whom they are assigned. It is critical that each team member know what is expected of them for the following week. Action items from previous meetings can be reviewed at the start of the meeting to help ensure that progress is on track and to hold team members accountable.

- Have a team member take meeting notes and ensure that these are sent to the team or uploaded to the team site.

- Be sure to have internal team meetings prior to client meetings. These pre-meetings will be great to practice going through your slide deck and to uncover any errors/issues that need to be discussed internally before meeting with the client. It is VERY helpful to invite your advisor(s) to these meetings.

Meeting Spaces

Teams often find it most convenient to meet at coffee shops, or at the offices of one of the team members.

Endeavour can also facilitate some spaces for the client or team meetings with limited availability. The instructions to reserve these spaces can be found on the Endeavour Knowledge Centre at https://sites.google.com/a/evcn.ca/knowledge-management/resources/tools-and-space-for-collaboration.

SUGGESTED TIPS FOR CLIENT TOUCHPOINTS

- Discuss setting up a regular cadence of touchpoints with yourself and the main contact on the client side based on their availability at the first meeting
- Organizing these regular touchpoints will allow regular check-ins with the client
- Can use this time:
    - To provide updates on project status and progress – will keep client engaged and looped in and avoid any surprises
    - To receive updates from the client on any changes on their side that may impact the project
    - As an alternative method of communication in case, the client has not been responsive via email
- These touchpoints are particularly helpful in Phase II while conducting research as it helps maintain communication between both sides

RECOMMENDED TIMELINES FOR YOUR TEAM

These timelines are intended as a guideline to assist you through the project lifecycle.

Event	Date
EM & Advisor Training	**Sat, Apr 5, 2025**
Orientation & Training Session I	**Sat, Apr 12, 2025**
First team meeting *For 30 minutes after the training session*	Sat, Apr 12, 2025
Email introduction to client *You should not contact your client until the Endeavour Client Relations team formally introduces you via email in the week following Orientation.*	Week of Apr 13, 2025
First team meeting with advisor	Week of Apr 13, 2025
First client meeting	Week of Apr 20, 2025
Training Session II & Statement of Work (SOW) Review *A draft of your SOW should be completed by Wed. May 7, 2025 and sent to* volunteer@endeavourvolunteer.ca .	**Sat, May 10, 2025** (half day)
Client-approved SOW submission *Your SOW should be complete by Training Session II where it will be reviewed. After incorporating the feedback received, you must secure sign-off from the client and then send the SOW to* volunteer@endeavourvolunteer.ca.	**Sat, May 17, 2025**
Primary research, survey development, workshop delivery	May – Jun 2025
Mid-Term Review *You will present the progress on your project and receive feedback from Endeavour's executive committee, advisors, and other teams participating in the same round. This is a platform to ask specific questions and solicit advice about challenges you have encountered. A draft of your presentation should be completed by Fri. Jun 13, 2025 and sent to* volunteer@endeavourvolunteer.ca.	**Sat, Jun 14, 2025** (half day)
Mid-Engagement Survey *Complete a mandatory 10-min online survey about your Endeavour experience*	Sat, Jun 14, 2025
Secondary research, analysis, and recommendation development	Jun - Aug 2025
Final Review *A draft of your presentation should be completed by Fri. Aug 15, 2025 and sent to* volunteer@endeavourvolunteer.ca.	**Sat, Aug 16, 2025** (half day)
Final Client Presentation	**Aug - Sept 2025**
Project close-out forms and exit surveys	**One week after the final client presentation**

APPENDIX A: INTRODUCTION TO ADVISOR(S)

Hello <ADVISORS' NAME>,

I would like to introduce myself prior to our meeting this Saturday.

First paragraph: <Is this your first round?> <Why now?>

Before the first training session, I will be sending out a Google form to canvass what the rest of the team members would like to get out of the Endeavour experience.

Having just read the agenda for Saturday, how long would you be available to stay behind for the Team Breakout Session from <END OF FIRST TRAINING SESSION TIME>pm onwards? Are we planning to stay at the <City Hall/Metro Hall> or do you have some other suggestions? I would like to send out an email tomorrow to let the team know how long we plan to huddle after the orientation.

If you prefer to chat instead of typing an e-mail reply, feel free to give me a call at 123.456.7890. I look forward to meeting and learning from you!

Cheers,
<EM'S NAME>

APPENDIX B: INTRODUCTION TO TEAM

Hello <TEAM MEMBER NAMES>

I look forward to meeting you all on Saturday morning.

For the break-out session towards the end of the day, we will start our meeting at <MEETING PLACE> to until <30 MINUTES TO 1 HOUR AFTER THE TRAINING SESSION>pm. As for the agenda, after exchanging some emails with <ADVISORS' NAME>, let's take it easy after a long day by first outlining any immediate next steps and then setting up the next team meeting. We will play by ear at <SAME TIME MENTIONED ABOVE>pm to see whether people are interested to go grab a quick drink/bite.

To get started, it would be great if you could spend 10-15 minutes before going to bed tonight to fill out the following survey:
<INSERT SURVEY LINK>

The purpose of this survey is for me to gather some administrative information about you and ***more importantly to better align opportunities in furthering your desirable developmental areas*** while volunteering with Endeavour.

This survey consists of two sections. Your inputs for the first section of this survey will be shared with other members of our team. Your inputs for the second section of this survey will only be viewed by me (i.e., the engagement manager) and will NOT be shared with the rest of our team.

<RE-USE PARAGRAPH ONE OF YOUR INTRODUCTION EMAIL TO THE ADVISORS>

Cheers,

<EM'S NAME>
123.456.7890

APPENDIX C: TEAM MEMBER SURVEY

Team Member Preferences

The purpose of the survey is for your engagement manager to 1) gather some administrative information about you, and more importantly 2) to better align opportunities in furthering your desirable developmental areas while volunteering with Endeavour for a meaningful cause.

Section 1: Your inputs for this part will be shared with other members of our team.

Name

Preferred email

Phone number (1) xxx.xxx.xxxx

Phone number (2) xxx.xxx.xxxx

Most preferred method of non-face-to-face communication

Second most preferred method of non-face-to-face communication

Third most preferred method of non-face-to-face communication

If you have selected 'Other' as your preference of non-face-to-face communication, please specify.

Hours per week available to commit to the engagement

General availability for meetings * Check all that applies

Monday evening
Tuesday evening
Wednesday evening
Thursday evening
Friday evening
Saturday morning
Saturday afternoon
Saturday evening
Sunday morning
Sunday afternoon
Sunday evening

Known vacation plans or "black-out" periods over the next 6 months

Any pet peeves that the team should be aware of about you

What is your Myer Briggs Type Indicator (MBTI)? If you have not done a Myer Briggs personality test recently, skip this question for now and go to http://www.humanmetrics.com/cgi-win/jtypes2.asp at a later time. Email your MBTI codes to your engagement manager afterwards. If you had done a Myer Briggs personality test recently, enter the four-letter code here.

Section 2: Your inputs for this part will only be viewed by the engagement manager.

	1	2	3	4	5
Strongly disagree					Strongly agree

I would love to develop the client's statement of work.

I am comfortable with developing statement of work.

I would love to conduct market research and analysis for this engagement.

I am comfortable with conducting market research and analysis.

I would love to do financial modelling and analysis for this engagement.

I am comfortable with doing financial modelling and analysis.

I would love to develop strategic options and recommendations for this engagement.

I am comfortable with developing strategic options and recommendations.

I would love to create PowerPoint presentations throughout this engagement.

I am comfortable with creating PowerPoint presentations.

I would love to deliver presentations throughout this engagement.

I am comfortable with delivering presentations.

I would love to attend client meetings throughout this engagement.

I am comfortable with attending client meetings.

I would love to chair team meetings for this engagement.

I am comfortable with chairing client meetings.

I would love to facilitate our team's brainstorming sessions for this engagement.

I am comfortable with facilitating brainstorming sessions.

I prefer to work on deliverables with less sub-team meetings.

I prefer to work on deliverables with more sub-team meetings.

Other personal and developmental goals in joining Endeavour.

Any additional information that your engagement manager should be aware of about you.

APPENDIX D: FIRST TEAM COLLABORATION

Hi Team,

I received the formal introduction to <ORGANIZATION NAME> from <NAME OF DIRECTOR – CLIENT RELATIONS> earlier tonight. Our team has now been officially introduced to <ED NAMES> at <ORGANIZATION NAME>.

Using "Reply to all", please review and provide feedback on the first email (see below) that I plan to send out to <ED NAMES>. On behalf of the team, I would like to send the email out at around <DATE/TIME E.G, 8 pm Monday night>.

Thanks in advance for your help.

Cheers,
<EM’S NAME>
--

<PASTE LETTER ON THE APPENDIX E OR YOUR OWN DRAFT HERE FOR THE TEAM’S FEEDBACK>

APPENDIX E: INTRODUCTION EMAIL TO CLIENT

Dear <ED NAMES>,

We are looking forward to collaborating with you over the next six months. With all of our team members either working or studying full-time, our team would like to meet with you at the <THEIR FACILITY NAME> on a week night of the week of <DATE>. Could you please advise us of your availability for that week?

Leading up to the week of <DATE>, we will be working towards gaining a better understanding of <ORGANIZATION NAME>. In the meantime, would you be open to sharing <ORGANIZATION NAME>'s current strategic plan and financial statements from <5 YEARS AGO> onwards with us prior to our first meeting?

Acting as your Endeavour's Engagement Manager of this engagement, I will be your primary point of contact for any questions or concerns that you may have. <OPTIONAL SENTENCE: SNR CONSULTANT'S NAME>, our Senior Consultant of this engagement, will be your secondary point of contact. Please kindly include <SNR CONSULTANT NAME> in our correspondences. <SNR CONSULTANT'S NAME> or I will acknowledge the receipt of your engagement-related inquiries within 48 hours and provide regular updates on subsequent new developments.

Regards,

<EM'S NAME> & <OPTIONAL: SNR CONSULTANT'S NAME>

<EM'S NAME> | Engagement Manager, Engagement ZZZ |123.456.7890 | XXXX@GMAIL.COM
<OPTIONAL: SNR CONSULTANT'S NAME> | Senior Consultant, Engagement ZZZ | 456.789.0123 | YYYY@GMAIL.COM

Endeavour Volunteer Consulting for Non-Profits (Endeavour) | www.endeavourvolunteer.ca

APPENDIX F: AGENDA OF FIRST & SECOND TEAM MEETING

Below is a suggested agenda for the first team meeting (120 minutes):

Time	Discussion Item
15 mins	Team Charter: Ground Rules
10 mins	Team Charter: Vision
10 mins	Team Charter: Mission
10 mins	Team Charter: "SMART" Goals (Specific, Measurable, Attainable, Realistic, Timely)
10 mins	(Optional - Team Charter: Motto) & Break
15 mins	Round-Table: <client name> research to-date
15 mins	Questions regarding <client name> documents
15 mins	Next steps of research - divide and conquer?
5 mins	General use of the Engagement Team website
5 mins	Next team meeting date & time; Wrap-up

Below is a suggested agenda of the second team meeting (60 minutes):

Time	Discussion Items
5 mins	Who will take minutes for today's call?
5 mins	Quick walk-through of "preso skeleton" end-to-end (preso skeleton: the presentation outline with placeholder/partially completed slides)
10 mins	Add/delete/modify skeleton for the first client meeting
20 mins	Discuss who will work on which slide(s) A buddy system to distribute the slides responsibilities can be beneficial for coaching and skill development. For each slide, a person who wants to "develop/enhance" his/her skill will work on the slide with guidance from a "slide mentor" of that slide (this is likely someone who has relatively more experience on the area covered by the particular slide)
5 mins	Review / Summarize who's working on which slide(s); Establish review date of the first draft (possibly in 1-2 weeks)
5 mins	Team charter review based on changes from the last meeting; Reminder to collaborate on the website (getting more important this week as we are putting the slides together)
5 mins	Next team meeting; Wrap-up

APPENDIX G: AGENDA OF FIRST CLIENT MEETING

Below is a suggested agenda for the first client meeting (120 minutes):

Time	Discussion Item
5 mins	Process of the Meeting to set the tone of the client meeting
15 mins	Introduction to introduce the engagement team to assure the client that the team is qualified to tackle their challenges
30 mins	Overview of Our Understanding of <client name>. This is to demonstrate that the engagement team has researched about the client and to provide a forum for any clarifications as required before scoping the statement of work
30 mins	Working with <client name>. This is to use a tentative workplan proposal to discuss the communication protocols and set expectations over the 6-month engagement
30 mins	Engagement Scope Discussions Purpose: to discuss with the client in arriving at a realistic approach to develop a mutually acceptable statement of work
10 mins	Next Steps; to summarize under-takings and arrange the next meeting to finalize the statement of work

APPENDIX H: GUIDELINES FOR MIDTERM REVIEW PRESENTATIONS

Objectives
1. Present and receive feedback on your progress, issues, findings, and next steps
2. Learn from and provide feedback on the work and experiences of other teams

Format Presentation & Feedback
1. **Team Presentation:** 15 minutes per team (see content guidelines below)
2. **Audience Feedback:** 10 minutes per team for:
   - Feedback on questions and issues raised by the team
   - Feedback on presentation, such as content, slides, and delivery
   - Feedback for the team to consider in moving forward with the engagement

Presentation Content Guideline
1. Client background and problem
2. Project goal and scope
3. Project milestones achieved
4. Key findings
5. Issues encountered
6. Next steps and timeline, including tentative deliverable date
7. Questions for the audience, such as how best to move forward with the project

You may include additional information that is relevant to informing the audience of your team's progress, concerns and next steps. Please note, however, that this midterm review is NOT a presentation of research or content developed.

If the mid-term review is happening in person, please bring a laptop for your presentation. An LCD projector will be provided.

If the mid-term review is happening virtually, please send a copy of your presentation the Friday before the presentation date. Please use the Endeavour branded template available on the Knowledge Centre.

Sample presentations from past teams can be found at:
https://drive.google.com/drive/u/2/folders/1EzA2zK4LMiy3ymttEDUjJdBtga7v2EH1 or
Knowledge Management Repository (Access will be provided by Endeavour IT request):
https://endeavourconsultingca.sharepoint.com/sites/EVCNKnowledgeCenter

The mid-term template is located at:
Template Download

While not every member of the team needs to present at this session, all engagement managers and consultants should have the opportunity to present at the midterm or final review session, or at client meetings.

APPENDIX I: GUIDELINES FOR FINAL REVIEW PRESENTATIONS

Attendance is mandatory and all consultants must stay for the entire session. If you cannot attend due to extenuating circumstances, please let us know by email. Dress code is business casual.

Objectives
1. Feedback on concerns/challenges going forward in completing consulting project
2. Feedback on key findings, recommendations, and metrics to be presented to the client
At least three consultants on the team are expected to present, preferably those who did not present at the mid-term review. The total amount of time allocated for each team is 30 minutes with the following breakdown:

Format Presentation & Feedback
1. **Team Presentation:** 20 minutes per team (see content guidelines below)
    Part 1: Overview (about 10 minutes)
• Client problem and project objective
• Next steps and upcoming timeline, including deliverable date
• Concerns/challenges with completing the project, including questions
    Part 2: Client Presentation Slides for Key Findings, Recommendations & Metrics (about 10 minutes)
• Slides of key findings, recommendations, and evaluation metrics to be presented to the client
2. **Audience Feedback:** 10 minutes per team for:
    - Feedback on questions and issues raised by the team
    - Feedback on presentation, such as content, slides, and delivery
    - Feedback for the team to consider in moving forward with the engagement

If the final review is happening in person, please bring a laptop for your presentation. An LCD projector will be provided.

If the final review is happening virtually, please send a copy of your presentation the Friday before the presentation date. Please use the Endeavour branded template available on the Knowledge Centre.

Sample presentations from past teams can be found at:
https://drive.google.com/drive/u/2/folders/1EzA2zK4LMiy3ymttEDUjJdBtga7v2EH1 or
Knowledge Management Repository (Access will be provided by Endeavour IT request):
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The mid-term template is located at:
Template Download

While not every member of the team needs to present at this session, all engagement managers and consultants should have the opportunity to present at the midterm or final review session, or at client meetings.

APPENDIX J: ABOUT ENDEAVOUR

Some stakeholders on the client's side may not be familiar with Endeavour. At stakeholder meetings, it is beneficial to have the information below incorporated into one of your appendix slides. If questioned, you can refer to this material and inform them as necessary.

Endeavour Volunteer Consulting for Non-Profits (Endeavour) is a Canadian charity that provides management consulting to improve organizational capacity and community impact. We recruit, train and match teams of skilled volunteers with non-profit organizations in need of pro bono consulting. Our focus is on serving non-profit organizations that otherwise cannot afford professional consulting.

Since 2007, Endeavour has engaged more than 1000 volunteers from a variety of fields and industries to provide over $8 million in consulting* to more than 130 local, national and international non-profits based in Canada, primarily in the Greater Toronto Area. These non-profit clients help communities in many areas, including the arts, children and family services, disabilities, education, environment, healthcare, immigrant services, rural development, skills training, poverty relief, and youth development.

During a typical Endeavour engagement lasting six months, a team of five-six Endeavour volunteer consultants will work closely with a client who has applied for Endeavour's assistance. Together they will develop and execute a statement of work that clearly defines the project. The consulting team then conducts research and analysis and develops practical recommendations that make an impact. Throughout the engagement, Endeavour provides ongoing training and support to the consulting teams and is available to clients to discuss any concerns that may arise.

To learn more about Endeavour, visit http://www.endeavourvolunteer.ca/.

APPENDIX K: POINTS TO DISCUSS WHEN CREATING THE TEAM CHARTER

1. Develop a communication standard
    a. Email vs. phone vs. Skype
    b. Urgent situations
    c. Appropriate response time
    d. Email consolidation
    e. Who should be CC'd
    f. Advisor relations

2. Discuss team meetings
    a. Method (in-person, Skype)
    b. Frequency
    c. What to do if you can't make it
    d. Agenda setting timelines and minute taking processes

3. Discuss Conflict management
    a. Conflict can occur at multiple levels
        i. EM & Advisor
        ii. Consultants & EM
        iii. Team & Client
        iv. Consultant & Consultant
    b. Define a logical plan to solve conflicts at each stage

4. Develop a contingency plan in the event one team member needs to leave the project or take an extended period away

5. Discuss how decision making will take place (i.e. majority)

6. Discuss the quality of work standards
    a. Early optimism

7. Expectations
    a. Discuss EM's expectations of consultants
    b. Discuss consultants expectation of EM
    c. Discuss teams expectations of Advisor and vice versa

APPENDIX L: SAMPLE TEAM CHARTER

1.1 Purpose of the Team Charter

The purpose of the Team Charter is to serve as the guidelines and rules of the engagement to help the project team work effectively. The Charter is a living document and should be updated as required. Any updates will be discussed with and ratified by the project team members.

1.2 Team Goals

1. Create a supportive environment where reciprocal learning, teaching and coaching are encouraged.
2. Set challenging and realistic goals.
3. Seek a balance between client satisfaction and fostering the professional growth of individual team members.
4. Meet or exceed client expectations.

1.3 Work Approach

Engagement Manager

1. Ensures team input and contribution.
2. Ensures the team understands and maintains focus on the deliverables.
3. Ensures completion and approval of the Statement of Work (SOW).
4. Ensures the timely deliverable of work tasks as per the SOW.
5. Delegates tasks.
6. Tracks and reports progress.
7. Acts as the first point of contact for the team and client.
8. Raises issues as appropriate.
9. Approves changes as required.

Project Advisor

1. Guides and advises project team.
2. Monitors progress and identifies gaps.
3. Clarifies deliverables for the next meeting.
4. Evaluates the final report and presentation.
5. Approves the SOW.

Consultants

1. Develop the Team Operating Agreement.
2. Contribute to the development of the SOW.
3. Contribute to project deliverables.
4. Complete project tasks on time and on quality.
5. Present client deliverables as requested and appropriate.
6. Raise issues as appropriate.
7. Practice document version control for all documentation.
8. Notify the Engagement Manager of any obstacles or potential obstacles preventing timely completion of client deliverables.

9. Inform the Engagement Manager of the status of work deliverables and any problems/issues.

1.4 Team Communications

This section describes how the project team members will communicate with each other. It includes where project documents will be stored and how they may be accessed, how and when meeting agendas and minutes will be distributed, and how confidential information will be handled.

- The project's Endeavour Team Site will house the most up-to-date version of project documents.
- Contact information will be housed on the site. Each team member will ensure their information is updated.
- All documents created throughout the duration of this engagement will be uploaded to the site.
  - File naming convention:
    - [file name][version #, (or "Final" for final)][date]
    - Submissions to the Client and Project Advisor will be final versions, with all changes accepted and track changes turned off.
  - Master Document Holder (MDH): (to be assigned per deliverable)
    - One person shall be designated the MDH. Everyone else will email their individual document components to the MDH. These components are not considered drafts and will be deleted by the MDH once the changes have been incorporated into the main draft document.
    - It is the MDH's responsibility to ensure component deliverables are received on time, or address unresponsive team members as required.
- All e-mail correspondence between team members will have the following subject line naming convention:
  - "Endeavour:[Project Initials] - <Subject>"
- The meeting agenda will be determined by the Engagement Manager, with input from the team members, and e-mailed to project team members at least 24 hours prior to meetings. Meeting minutes will be shared via e-mail within 1 day.
- Team members will appreciate the sensitive nature of information discussed during this project and will share with care. Where applicable, documents will include a footer indicating that information is confidential.
- "Sidebar" conversations between team members during team meetings will not be allowed.
- All communication will be open and courteous. No "overtalking" or interrupting.
- No texting or use of electronics will be allowed during meetings.
- Team members will keep each other informed.
- All ideas are welcome and will be discussed on its merits.
- The ORID framework will be used for communication breakdowns. The following steps are used in the ORID framework:
  - 1) Declare breakdown;
  - 2) Describe the situation or feeling (i.e. "I'm frustrated because");

- 3) State what needs to be done;
- 4) Discuss the solution;
- 5) Agree, decide to park and move on, or escalate as required.
  - Communications are confidential.

1.5 Decision Making

This section describes how project team members will make decisions. Everyone must agree on how decisions will be made to ensure that everyone can live with the decisions made and to ensure that the project can move forward. This section can include guidelines for voting on decisions, how decisions will be documented, definitions of key terms, and what happens if the team cannot come to a decision (for example, escalation to the project sponsor or to a governing body).

1. The team will try to achieve consensus on decisions. Consensus means that everyone can live with the decision. It doesn't mean everyone has to agree 100%.
2. Decisions will be made as needed, regardless of attendance. Key decisions will be reviewed at the following team meeting if there are absent team members.
3. Team members may abstain from voting.
4. The Engagement Manager will have final approval of team decisions. In case of a conflict, the Engagement Manager will serve as final arbitrator. Every attempt to maintain Team Goals as outlined previously will be made.
5. All client work package/deliverables will be approved by the Engagement Manager.
6. Final client deliverables (such as the SOW) will be reviewed and approved by the Project Advisor prior to the Engagement Manager's approval.
7. Changes to the SOW after acceptance by the client will require change management documentation and approval.

1.6 Meetings

This section establishes how project team meetings will function. It addresses what will generally happen at meetings, sets attendance expectations, and establishes who will be responsible for the facilitating, frequency, and scheduling of meetings.

- The team will meet [on a certain date and time] every [frequency] (or as required).
- Meetings will be conducted in-person and/or via conference call.
- Issues, risks, change requests, and action items will be reviewed and updated at each meeting.
- Leaders of each particular workstream will report status at each team meeting.
- During each meeting, a "parking lot" will be used to record topics that require discussion at a later date.
- Each meeting will have a facilitator. Team members will accept the facilitator's decision to table or park discussion topics. This facilitator will be responsible for:
  - Keeping the meeting on track and adhering to the meeting agenda.

- Ensuring that minutes are taken.
- Ensuring that the next meeting’s facilitator is assigned.
  - Minute takers and timekeepers will be assigned for each meeting.
  - Minute takers will capture accurate minutes and distribute the minutes within 24 hours of the meeting.
  - Meetings will start and end on time. Team members will attend meetings in person when feasible. A dial-in number will be available for remote attendance.
  - Any team member who knows they will be absent for a meeting will inform the team of their absence and provide any required input for the meeting by e-mail beforehand.
  - Any team member who misses a team meeting and does not inform the team beforehand will provide their input to the meeting by e-mail after the meeting.
  - Meetings will occur regardless of whether some team members are absent. It is the responsibility of each team member to stay current on the project team activities and follow up for any assigned work, even when he or she has missed a meeting.
  - Meeting discussions are to be focused and action-oriented with alternative views to be evaluated.

1.7 Personal Courtesies

This section outlines the personal courtesies that team members will extend to one another. Do not assume that personal behaviours are understood.

- Each team member represents a specific area of expertise or business unit. Team members will bring their individual perspectives to the team and will also consider what is best for the organization.
- All cell phones and other communication devices must be silenced during meetings and used on an exception basis only.
- All team members will be punctual.
- All team members will come prepared and contribute.
- Have fun.
- Be respectful.