Capstone Team Formation

# Purpose

In order for a design team to perform at a high level, it is important to establish ground rules, expectations, and goals that define your ‘culture’. This session is intended to generate discussions and written consensus among team members about different elements of productive team relationships. You will negotiate shared understandings about team operation and record them in the form of a ‘contract’ for all internal stakeholders to refer back to throughout your project. You should plan to get instructor feedback on the first draft of your contract during your first instructor/team meeting.

# Kick-Off Meeting Tasks

1. Introduce yourselves and meet your lead instructor and mentor. If it is required for your project, and wasn’t already in your packet, sign the Student Activity Participation (SAPA). Give this to your lead instructor.
2. Take up to five minutes to brainstorm a clever/tasteful team name that will appeal to your **client** as well as your **mother**. Finalize this team name before your first instructor/team meeting.
3. Compare your schedules and settle on a weekly time for your instructor/team/mentor meeting. Make sure that this time is acceptable to your lead instructor and mentor. Decide where you will meet and who will type up and send out the agenda prior to your first meeting.
4. Receive contact information for your client as well as additional background information (beyond that posted on the course website) from your lead instructor. Propose a tentative date for your client interview (in person or via the telephone) within the next week.
5. **Using the information in Table 1**, identify individuals on your team who possess the strongest skills in each of the supporting teamwork processes. Further, identify areas in which your team does not feel confident in their current abilities.
6. Prepare a draft of your team contract (or set of team bylaws) that defines your team’s organizational structure and commits all members to agreed-upon operating procedures. This “contract” should emerge from substantive team discussion and from full member agreement. The team contract should be signed by all members and referenced regularly in the course of team business.
7. Review today’s work with your lead instructor/surrogate as part of being dismissed from class. Give them a copy of page 2 (w/member names and email addresses). They will create a group email for your capstone team.

# Pre-Meeting Tasks

1. Type up your team contract. Bring copies for each team member and your lead instructor to your first meeting.
2. Create an agenda for your first team meeting, and circulate to the team/instructor beforehand.
3. Make an entry in your personal logbook. Remember to put your name and team name on the cover, your teammates contact information on the inside, and leave several pages for your table of contents.

Team Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Weekly Team Meeting Time/Place: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructor Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\*\*Mark which member will create the agenda for the first team meeting\*\***

**TABLE 1. TEAMWORK PROCESSES**

|  |  |  |
| --- | --- | --- |
| **Teamwork**  **Area** | **Supporting Processes** | **Team Member(s) strong in this area** |
| **Team Relationships** | Building an inclusive supportive climate |  |
| Gaining buy-in and interdependence |  |
| Resolving conflicts to enhance teamwork |  |
| **Joint Achievements** | Establishing shared team goals |  |
| Managing tasks to achieve team goals |  |
| Producing competent consensus outputs |  |
| **Member Contributions** | Allocating responsibilities to members |  |
| Achieving quality work from members |  |
| Facilitating team member professional development |  |
| **Team Communication** | Achieving effective in-team communication |  |
| Managing stakeholder communication |  |
| Building shared knowledge assets |  |

A template for a team contract follows. You may modify it to fit your team needs and preferences. Be sure to provide adequate detail to inform people of expectations and to provide a basis for evaluating teamwork and resolving differences. When your contract is completed submit it to your lead instructor before your first instructor/team meeting. Plan to allocate some time at the first instructor/team meeting the review/revise this document prior to its finalization.

**Team Contract** *(template)*

**Section 1: Team Name and Mission**

*What is your team name?  
What is the mission of your team in 1-2 sentences?*

**Section 2: Membership**

*Who are the team members?  
What consultants/mentors/instructional staff are associated with this team?*

**Section 3: Roles and Responsibilities***Who will be in charge of your budget?  
Who will be the primary client contact?  
Who will organize team meetings?  
Who will be in charge of keeping team documentation?  
What other roles are critical to team success?  
How will roles be selected/assigned?   
What are the key responsibilities associated with each role?*

**Section 4: Team Relationships**

Relationships among team members must support full and respectful engagement of all members for the benefit of the entire team.  
*Members will…  
Members will NOT …*

**Section 5: Joint Work**

5a. **Purposes of Joint Work**

Team members will work together to establish collective goals and to produce decisions and work products that advance teamwork and project success.  
*Members will…  
Members will NOT…*

5b. **Team Meetings**

Team meetings are an important example of working together.  
*\* Where and when will the team meet?   
\* What components are required in team meeting agendas?  
\* How will meeting minutes be taken/circulated?*

**Section 6: Individual Work**Team members are expected to work alone in many cases to complete work important to the team.   
*\* How will work assignments be made?  
\* How will quality expectations be established and verified?  
\* How will due dates be established and verified?  
\* How will status of work in progress be communicated?*

**Section 7: Documentation and Communication**The team must maintain timely and accurate documentation of its individual and collective achievements, while also communicating needed information to one another and key project stakeholders.   
*\* What individual documentation will be kept?  
\* What team documentation will be kept?  
\* What is the process for communicating with other team members?  
\* What is the process of communicating with your client/outside stakeholders?*

**Section 8: Conflict Resolution**The team will strive to resolve conflicts quickly and to the satisfaction and benefit of everyone involved.   
*\* What process will be used to address conflicts?  
\* How will team dynamics be communicated to instructors/mentors?*

**Section 9: Amendments**

*\* Where will this team contract be kept?  
\* How often will the contract be reviewed?  
\* How can the contract be amended?*

**Section 10: Affirmation of Compliance**

We, the members of this team, affirm that we have established this contract with input and consensus of all members. By our signatures, we commit to compliance with the contract for the benefit of all members and the team as a whole.

|  |  |  |
| --- | --- | --- |
| **Name** | **Signature** | **Date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |