**Project Teambuilding**

One of the key factors in the success of a workshop project is the effectiveness of the project team in maximizing its diverse mix of skills and experience, and in managing interpersonal dynamics and project-related tasks. Research indicates that virtually all teams “evolve” through several stages of development, and that this process is facilitated when (1) team members first assess their own strengths and weaknesses related to their participation in the team, and (2) the team sets clear objectives and ground rules to guide its activities.

These initial team-building activities are intended to help you and your workshop team get off on the right track and maximize your enjoyment of the workshop experience. Individual team members will complete **Part I (SelfAssessment)** on their own and will email their self-assessment to each of their team members by early September. Each team will work on **Part II (Team Guidelines)** and will post their team guidelines and related self-assessments (as one file) in the CourseWorks drop-boxes prior to the start of the spring semester.

1. **Self-Assessment** (to be completed by each team member)

Analyze your particular **strengths** and **weaknesses** related to working on your workshop project, your **expectations** for the workshop (i.e. what you want to get out of it by the end of the semester, and any **constraints** on your full participation in team meetings, field travel or other aspects of the workshop project (e.g., other fall 2013 course requirements, work-study or internship requirements, family responsibilities, etc.). Summarize this selfassessment in a “SWEC” matrix as shown below. (Bullet points are fine. Your “SWEC” matrix should easily fit on one page.)

Name: Thomas Dewick

Team Client’s Name: Quaterion

**Self-Assessment**

|  |  |
| --- | --- |
| **Strengths** (related to the team project):    Presentation Skills  Leadership  Finance knowledge and experience  Math skills  Quantitative analysis skills | **Expectations** (about the team project and workshop experience):  Hand on experience given that the firm is a smaller company  Better understand quantitative analysis of financial markets |
| **Weaknesses** (related to the team project):    Programming | **Constraints** (on full participation in the team project):  Schedules  Various levels of finance knowledge and experience |

1. **Team Guidelines** (to be developed by each team)

After reviewing individual team members’ self-assessments, each team will develop basic guidelines for its activities over the next three and a half months. Each team’s guidelines should cover at least the following basic topics, but teams should feel free to include other topics or team management mechanisms that they think would be useful. Team members will be expected to follow these guidelines. Teams are also encouraged to revise their guidelines periodically, as needed (e.g., to address any unanticipated issues or to further improve their performance). The guidelines shouldn’t be longer than 2 pages.

Team Client’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Members: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. **Team Objectives**

* 1. **Shared Principles**

* 1. **Potential Obstacles or Challenges to Achieving the Team Objective(s)**

* 1. **Key Team Functions** (faculty contact; client contact; project manager; SIPA liaison; etc.)

* 1. **Core Meeting Times** (in addition to class time, at least 2 additional hours when everyone is available per week)

* 1. **Ground Rules** (should cover topics such as communications; setting and management of meetings including agenda/conduct/minutes; possible rotation of roles/responsibilities; decision-making; allocation of work; and consequences for team members who don’t follow the rules)

* 1. **Resolution of Problems** (the team’s strategy for minimizing and resolving disagreements or other problems that may arise – e.g., regular communication; regular “check-in” on team dynamics at the start of meetings; brainstorming or use of a mediator to resolve disagreements between team members)