

Milestone 1 (Team Charter) 2%

Groundwork for the Team Project: Roles, Goals, and Bylaws

1. Agree on a **communication platform** (text or other direct messaging system); exchange **contact info**, and agree to respond to each others' texts/ communications **on the same day** or **within 24 hrs.** (unless emergencies prevent this).
2. Create a **Google Docs** account (or some other online team/share point platform).
3. Open up a **Recorder's Document**: Use one for each meeting, and when done, save in your shared Google Docs account or other shared location. You'll be required to **submit 3-4 such Recorders Docs** (one by each team member) as part of your **Appendices for Report 3**.
4. Review **Module 5 SLIDES** on Team Charters: Roles, Goals, and Bylaws. Establish roles for today's meeting and for all future meetings:
 - **Choose a Recorder.** This person will be responsible for keeping an accurate record of topics discussed and decisions made, and for **posting/sharing the Recorder's Document (MODULE 5)** by the **following day**. Every member should be able to access a copy of what was discussed, decided, and agreed on, including any tasks, responsibilities, or jobs assigned, plus agreed-on due dates, etc. **Rotate** this position so everyone gets a chance to be recorder more than once.

Use a Recorder's Document for ALL meetings

At each meeting, record the following:

- **Who's present** at each meeting and **roles assigned**
- **Topic(s)** of discussion
- **Summary** of points discussed
- **Decisions made**
- **Tasks assigned**
- **Due dates for tasks**
- **Date** of next meeting

Define each as a separate "agenda" item

- **Choose a Group Coordinator or leader**, responsible for organizing agenda items for up-coming meetings; for keeping the "bigger picture" in the foreground; for confirming decisions and task delegation; for hearing back from team members about tasks and results; for raising discussion of problems if they arise.
- **Choose a Discussion Facilitator** ("Gate Opener"); rotate as needed.
- **Choose a Time-keeper**; rotate as needed.

Now you're ready to set up your **TEAM CHARTER!**

Having reviewed my course SLIDES on **Team Charters (Roles, Goals, and Bylaws)** under Module 5 (Tasks & Actions), complete the following to form the basis of **MILESTONE 1**.

1. Set up **MEETING TIME and LOCATION**. Establish **agreed-on procedures** for meetings outside of class: **time, frequency, duration**, i.e. **when, where (in-person? Zoom? Facebook? Other platform?)**, **how long, how often**. That is, establish a **time and place** where you could **all meet** outside of class time as need arises. This need *will* arise as the project intensifies towards end of semester.
2. Establish a **COMMON TEAM GOAL** (1-2 sentences) that you all agree to work towards for the **Report 3 project**. Having a key goal ensures everyone's "on the same page" and working to achieve the same outcomes. Be explicit about what you want to achieve by working together on this team project.
3. Create a total of **FOUR TEAM BYLAWS**, guided by the following resources:
 - My SLIDES on Team Roles, Goals, and Bylaws
 - Any **TWO links** under MODULE 5
 - **ONE of the following chapters:**
 - Katzenburger and Smith, *The Wisdom of Teams*
 - McCahan, *Teamwork and Communication*

From reviewing the above, each person should bring back **2-3 team tips or bylaws** (being sure to identify the source of the tips and bylaws) to share with the team, explaining in 2-3 sentences what purpose it serves and why it would be useful to adopt.

Record each person's tips or bylaws (being sure to identify the source of the tips and bylaws); you'll end up with **6-8 such tips or bylaws** (though you'll only submit **FOUR** for Milestone 1).

Aim to base **TWO of your Bylaws** on "what if . . ." scenarios—e.g. what if someone misses a meeting; what if someone is habitually late to meetings or habitually misses meetings; what if someone doesn't respond to texts or other communications; what if someone doesn't carry out tasks; what if someone produces work that is under par; what if you run into other problems you can't resolve; etc. Spend 2-3 sentences explaining how this bylaw will usefully serve to facilitate team cohesion/ productivity.

The goal here is to confirm what you'll do in case problems arise that *impede the progress of the team as a whole*. Establish steps for the team to take to help resolve such problems. Create your own first steps, but agree to consult with me if your actions don't resolve the problem