

Team Formation & Organization

Date

Mission/Intention:

The Team Formation & Organization Template is organized as a process to lead teams toward developing culture, vision, mission & agreements.

The sections are:

1. Practical Information:

2. Team Name, Our Story, Project Name, Assignment/Objective, Team Member Contact & Communication Info, Skills Inventory

2. Big Picture:

Team Values & Goals, Vision, Mission, Aims

3. Team Operating Agreements:

Role Descriptions, Expectations & Agreements for how the Team will work together, conduct itself, and perform tasks. Including Logistics & Communication, Assignments & Deliverables, Team Process & Other Agreements

4. Resources & Assessment Tools:

Field Guide to Team Agreements: A companion document containing instructions and examples to jump start your Team's path toward developing its own Team agreement

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Team Name:

Our Story: How "We" Came to Be

Why we work together

Project Name: *(what you are working on together as a team)*

Assignment/Objective: *(name of what you are working on together as a team)*

Team Members *(name, MTBI styles & any team member roles; i.e. leader, note-taker, calendar & time keeper, process & feedback facilitator, etc):*

Name

Skype:

mobile:

email:

MTBI/Enneagram:

Preferred method of contact:

N/A Times, Competing Commitments: (Are there competing family, work, school or other commitments that affect Team-member availability or participation?)

VALUES & GOALS

Personal Values:

- ***name***
- ***name***

Individual Goals for this Project:

- ***name*:**
- ***name*:**

Team Goals:

- ***name***
- ***name***

SKILLS INVENTORY

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Share skills, desired roles and places where members can readily contribute or learn as part of the Team. Roles can be fixed, shared, or rotated among members. They can be based on existing skills or areas where members want to improve or gain experience.

Skills Inventory	Name(s)
Research	
Spreadsheets or Calculations	
Technical Writing	
Persuasive Writing	
Editing or Formatting	
HTML, Coding, Computer Troubleshooting	
Graphics, Video, Creating Models	
Public Speaking	
Team or Meeting Facilitation	
Project Management	
Other	

VISION, MISSION, AIMS

Vision, mission and aim are three inter-connected aspects of the purpose and intentions of a team or organization. A circle's aims derive from its vision and mission. (SAMPLE: Organic Gardener -- Vision: Organic, inexpensive vegetables on the family dining table all year. Mission: Plant a garden big enough to provide vegetables for a year. Aim: Fresh vegetables in the summer and canned and frozen vegetables in the winter)

Vision: (an image of the future as the team/organization sees and desires it. It is a shared dream of all members, giving a sense of shared values, identity and

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purpose.) What is our shared dream, one that represents our values, identity and purpose?

Mission/Intention: (the assignment the team/organization gives itself to realize its vision. It is a source of motivation.)

Aims: (the concrete or specific products or services the team/organization intends to produce in order to further the achievement of its mission.)

ROLES, AGREEMENTS & EXPECTATIONS

Member Roles: (Org/Class-Specified, + any team member roles; i.e. facilitator, note-taker, calendar & time keeper, process & feedback facilitator, etc)

Roles

Role Descriptions (see ~Facilitator, Secretary, & Participant Roles~)

Sub-Team or Assignment-Specific Roles?

Team Tasks: (How team structure functions--optional—suggestions below if it is helpful)

- **Leading:** lead the rest of the Acting Team in your area of specialization
- **Doing:** take appropriate actions to fulfill your mission/intention
- **Measuring/Feedback:** co-create your learning experience through thoughtful, awareness-enhancing feedback

EXPECTATIONS & AGREEMENTS: (assignments/deliverables, communication, expectations) (samples below)

Logistics & Communication

1. When will we have meetings?
2. Who is responsible for taking notes during meetings?
3. Who will take time during meetings to schedule events on a team calendar?
4. Who will facilitate meetings?
5. Will there be a regularly scheduled all-hands meeting? When?
6. Will there be a regular/quarterly team review meeting?
7. Will there be regular board or advisor meetings? When?
8. **Communication:** Where can we find contact info for our team?
9. **Time sensitive communications:** what are our shared expectation for time

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sensitive communication? What our our boundaries?

Tasks, Assignments & Deliverables

1. How will we create a culture of responsibility & empowerment to complete tasks?
2. How will we create a culture of learning and continuous improvement around incompleting (or incompletionable) tasks?

Team Process & Other Agreements

1. What is our definition of success?
2. How will we communicate?
3. How will we conduct meetings?
4. How will we make decisions?
5. How will we manage completing tasks & working as a group?
6. What rules of engagement will we use to help navigate creative tension, conflict or disagreement?
7. How will we have fun & celebrate our accomplishments?! =)
8. Other?

RESOURCES & ASSESSMENT TOOLS

Team Assessment

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Team Goals (replace with your unique Team Goals)	Leadership Rating	Initiative Rating	Participation Rating	Collaboration Rating
1. Open every meeting with individual check-in and close with appreciations.				
2. Schedule one regular team meeting per week for at least 60 minutes.				
3. Send meeting agenda at least 24 hours prior to meeting. (Team-members need only reply with changes or additions.)				
4. Send drafts of work to review at least 24 hours before review/deadline.				
Rating Scale				
5	We met and exceeded our Team Goals and Agreements and our Individual Goals.			
4	We met our Team Agreements and some of our Individual Agreements.			
3	We met our Team Agreements and talked about our Individual Agreements.			
2	The team's performance, based on our Team Goals and Agreements, was average.			
1	The team's performance based on our Team Agreements was minimally acceptable.			
Definitions				
Leadership	Demonstrates shared leadership.			
Initiative	Quality, value, and timeliness of work submitted.			
Participation	Level of progress in meeting Individual Agreements through the teamwork.			
Collaboration	Exhibits working through respect, openness, humility, appreciation and sense of humor			
Contribution	Degree of movement toward a learning community and extraordinary team.			

Individual Feedback

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Team-member Name:				
Goal #1				
Individual Contribution Rating	1	2	3	4
Leadership: Presence and engagement at team meetings (virtual & face-to-face) in a way that demonstrates shared leadership.				
Initiative: Quality and timeliness of work submitted. Finding ways to add value.				
Participation: Level of contribution to team effort in all its aspects.				
Collaboration: Cooperation with other Team-members through respect, openness, humility, and sense of humor. Recognizing how to appreciate the work of others.				
Contribution: Degree of support to the targeted learning of others and the team as a whole.				
Please provide reasons for your choices above (Use of On-going Regard and Appreciative Inquiry help):				
One area of further growth and improvement would be (Specific details/examples help):				

Map Meeting Assessment

Date:

Team-members in Attendance:

Effectiveness & Results: For those agenda items that we addressed today, how satisfied are you with the quality of the final outcomes / results? (0= Very Dissatisfied, 10 = Very Satisfied)

Myself	Team	
		Encouraged Others
		Acknowledged Others Concerns

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		Summarized
		Established Consensus
		Clarified Understanding
		Asked for Information or Examples
		Stated Agreement / Disagreement
		Used Humor
		Came Prepared
		Kept time and adherence to the agenda
		Documented key decisions and action items

What could be done to improve our team process?

What agenda outcomes would you like addressed at the next meeting or for our next project?

Resources

Great Groups & Teams Wiki w/Models & Definitions

http://www.ars-novo.org/wiki/Groups_and_Teams

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