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Example Team Charter

This is an example Team Charter. Your instructor may assign a different version with different instructions. However, this can also be used for all teams even if the Charter is not an assigned activity.

It is strongly suggested that this type of Charter be one of the first activities for a new team in order to establish expectations, workflow habits, and expected levels of participation from everyone in the team.

Team charters should be revisited as needed to update information, practices, and processes.

Format the Team Charter. Teams can use a simple memo heading format.

> From: [team name]
> To: [instructor/advisor]
> Re: Team Charter
> Date: [x]

Member Information
Create a section in the document for each person to have a short section. Therein,
- list all team members (using their preferred name) and their preferred email address.
- write a short bio, no longer than four sentences, that indicates their major, interests, and specialized talents that may come to bear in this course. This will help align tasks and talent.

Team Functionality
The team must outline its process flow in precise detail.
- Describe how the team will communicate, asynchronously. Emails? Slack? Discord? Other? If needed, this communication channel should be able to be downloaded and archived.
    - NOTE: Create this method and invite in the instructor if it's a tool like Slack or Discord. For the instructor, use this address: [instructor email] .
- The team needs to discuss how asynchronous discussions will happen, including the use of threads, hashtags, or other organizing features to aid team flow.
- Outline the expectations for how often those communication channels will be checked for updates and information.
- Articulate *how* the team wants to meet. Document how and when "live" meetings can happen. For example: "We will meet live every Monday at 7pmEDT in Duffield Hall outside of the snack bar. We will then find a space to work together."

Commented [TMN1]: The items here are suggestions. Change them as needed.

Think carefully about how interactions should move forward. Here, the team creates expectations for all members.

Commented [TMN2]: If teams are meeting f2f, it's imperative to choose a public, well-lit, safe, and ADA accessible spot. Meetings that are so late that campus bus lines no longer run are unacceptable. Private apartments should also be avoided, for safety reasons.

**Cornell
Engineering**
Communications Program

- Commit to a method of tasking assignments and being able to track progress. Articulate it fully. Some teams like to keep a common Google Calendar and use the Task feature. Some teams like to use Trello. Some teams use a continuously updated Google Doc or Sheet. It should be easy for all members and the instructor to know (at a glance!) who was in charge of what and how far along that task has come.

Accountability Practices

Answer these questions in some good detail.

- What will happen if a team member misses an internal team deadline?
- What will happen if a team member misses a course due date?
- How will the team will bestow honor and praise for any member that goes above and beyond the call of duty?

NOTE: For the above items, <u>specific details are essential</u>. Here's a weak example, followed by a strong example.

Weak: "If any team member misses more than two meetings in a row, we will contact the instructor."
> *This is a weak practice because it doesn't outline process or desired outcomes. Instructors already have in grading practices. Instead, articulate exactly what should happen, as in the "Stronger" example below.*

Stronger: "If any team member misses more than two meetings in a row, the project leader will send an email to the instructor stating that the team member should have 10 points removed from the next assignment. With that notice, the project leader will include links to the team meeting minutes that document the missed meetings and screenshots of our Slack conversations where we tried to establish contact. "

> *Notice that the stronger version provides details for what the situation is, who they will contact, what triggers that contact/reporting, what will be included as "evidence," and so forth.*

Schedule

The team needs to develop an initial schedule, knowing that it will be updates and mature over time. This initial calendar-making is to set the tone and pace of work. This early schedule will be supplemented by the more detailed Action Plan to come.
- Create a calendar, list, or table of the known due dates for this course.
- Each member should also include all known tests and crunch times for other courses or obligations.

Cornell Engineering
Communications Program

- Backfill internal team due dates for all due dates for this course.
- The schedule can exist as a Gantt chart, table, a Google Sheet, a Trello board, or as a link to an active Google Calendar. Whatever method is used, it must be shared with the instructor.