



SKILLS MATRIX AND TEAM CHARTER

Instructions: Complete this worksheet as a team to get to know each other, set ground rules, and improve your team’s performance. Use this outline as a reference at future milestones to reflect on your performance, adjust roles, address conflict, and discuss changes to group expectations.

Part 1: Team Skills Matrix In the first row below, write the names of each of your team members. Then complete the matrix by marking the appropriate boxes beneath each team member’s name to indicate which skills are particular strengths for that person. The last rows are open for your team to add any other skills you feel are important for the team assignments.

SKILLS	NAMES					
Big-picture thinking						
Creativity and risk-tolerance						
Organization						
Detail-oriented						
Deadline-focused						
Client management						
Team management						
Meeting facilitation						
Research skills						
Writing skills						
Other:						



Part 2: Team Charter Complete the matrix below by discussing each item, filling in the table, and signing at the bottom to indicate agreement.

	Plan A: Our Team Ideal	Potential Obstacles	Plan B: Our Backup Plan to Overcome Obstacles
Decision making	<i>How will we make decisions? Options include unanimous agreement, majority rule, compromise, etc.</i>	<i>What is likely to cause disagreements?</i>	<i>How will we handle disagreements? How will we ensure disagreements are kept professional, productive, and respectful?</i>
Communication	<i>How will we communicate (e.g., email, Google Docs, etc.)? Which platforms match which purpose for our team?</i>	<i>What are likely obstacles to good communication?</i>	<i>What will we do if communication breaks down? If 1+ members are unreachable/unresponsive?</i>
Meetings	<i>When and how often will we meet?</i>	<i>What are likely obstacles? Keep in mind extracurricular commitments (e.g., teams, other deadlines, work, commuting, etc.).</i>	<i>What will we do if 1+ members are consistently late, absent, or unprepared for meetings?</i>
Ground rules	<i>What are our rules about how we will function as a team (e.g., setting internal deadlines X days before due date, arriving on time and prepared to meetings, etc.)?</i>	<i>What are likely obstacles that will prevent us from meeting our ground rules?</i>	<i>What will we do if our ground rules break down?</i>
Individual contributions	<i>What are our expectations about individual participation and effort?</i>	<i>What are likely reasons why individual contributions might fail to meet expectations?</i>	<i>How will we constructively handle performance below expectations? How will we reward performance above expectations?</i>
Individual consequences	<i>How will we hold each other accountable for violations? Options include privately bringing the issue to team member's attention, group discussions, warnings, being asked to treat the team to snacks, poor evaluations, etc.</i>		
	<i>1st offense:</i>	<i>2nd offense:</i>	<i>3rd offense:</i>

Declaration

By signing below, team members acknowledge and agree to be bound by the guidelines outlined above.

Team Member Signature

Date

Team Member Signature

Date