

Team Management Toolkit



Purpose

Toolkit to give your initiative the structure and leadership needed through thoughtful consideration of team roles and responsibilities

Who this is for

- Project Leads
- Team Members (use for alignment and orientation, support tool building)

When to use

Budgeting for the initiative

Planning and scoping the initiative

Closing the initiative

[Introduction](#)

[Roles & Workstreams Guide](#)

[Team Charter Template](#)

[Workstream & Workload Tracker](#)

Introduction

Why is this toolkit important?

Effective initiatives come from effective teams. Especially in a complex academic environment, where multiple stakeholders are involved and priorities frequently shift, effective team management becomes essential. This toolkit provides a structured approach to assembling and organizing your team, setting clear expectations and responsibilities, plan for competing demands, and monitoring progress, which helps ensure that everyone is aligned and working toward common goals. It also facilitates better communication and coordination among team members, reducing misunderstandings and delays.

Key actions

- Take time to discuss roles, responsibilities and capacity expectations before the initiative starts to avoid conflicts down the road
- Make sure to clearly document workflows (e.g., how decisions are made) and initiative-specific agreements to ensure the team is aligned

How to use this toolkit

The Team Management Toolkit is designed to enhance project organization and effectiveness by providing structured approaches for defining team roles, managing workstreams, and setting expectations. Most of the components of this toolkit should be used in the planning phase or at the beginning of your student success initiative. The tool also includes a guide to monitor and adjust workstreams and capacity throughout the project.

Tips

Refer to other elements of your [Project Charter](#) such as your initiative's scope, timeline, outcomes, and stakeholders to determine the necessary workload and skills for successful completion.

Remember: Consider the scope of your initiative, projected timeline, intended outcomes, and all involved stakeholders to determine the workload and skills required to complete the initiative successfully.

Tools overview

There are 3 tools in this toolkit. They can be used together or individually and are facilitated by the project lead.

Team Roles & Workstreams Guide

Used at the start of a project to identify relevant team roles and responsibilities, and to define decision workstreams.

[Go to tool →](#)

Team Charter Template

Define team principles and other expectations, such as communication and meeting guidelines.

[Go to tool →](#)

Workstream & Workload Tracker

Track and adjust workstreams and capacity across project lifespan.

[Go to tool →](#)

Related

Next steps

- Starting with appreciation fosters a positive team dynamic and opens the door for better collaboration. Try the appreciation icebreaker activity here: [Appreciation Icebreaker](#).
- Establishing clear next steps ensures that your team effectively moves forward with actionable plans to enhance student success. Discover how to plan your next steps here: [Planning Next Steps](#).