

# 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

## Roles & Workstreams Guide

### Why is this tool important?

Crafting an effective team at the start of an initiative takes consideration. This guide highlights several key considerations for the team launch phase.

## Preliminary considerations for the team lead:

1

**Team size matters – exceptionally large teams can hinder effectiveness.**

Limiting team size to around 7 maximum is a common approach.

2

**Determine the budget for the team and/or how compensation will work.**

Work with HR or the Deans/Department heads/Provost Office to determine if you have a budget for additional compensation for the initiative team members or if the initiative falls within their job responsibilities.

3

**What existing software and/or templates are available at your institution to help with project management?**

For example: Asana, Microsoft Teams, etc.

## 📖 Resource

[Download resource ↓](#)

### Determining Team Roles & Responsibilities

What roles or functions does this initiative require? Not all projects will have one person per role; think of these as functions to be done/hats to be worn by team members to facilitate the project.

#### Potential roles

- Project manager
- Team member
- Project leader
- Advocate
- Comms/marketing manager
- Lead developer
- Stakeholder liason
- Evaluator
- IT project manager
- External stakeholder
- Sponsor
- Other

### Project Workstreams

What are the workstreams, and do they align with the roles? Utilize the activity below to consider team roles along with workstreams as you assemble the team.

## Allocating Roles

You may complete this activity in consultation with the team by answering the prompts in a worksheet format, and/or creating a [responsibility assignment matrix](#) for the team and assign roles.

**Tip** While business models like the RACI-matrix can be useful, they often don't fully capture the complex organisational structures and alignment processes of higher ed institutions.

Your primary goal is to map responsibilities and establish clear decision pathways for your initiative. Focus on balancing fitting your project to a chart with creating a chart that fits your project.

### Guiding Questions

- 1 Who is responsible for each workstream?
- 2 Who makes final decisions for the team and how?
- 3 Stakeholder engagement & management

#### Consulted

Whose responsibility is it to manage expert outreach?

What types of expertise might be needed? Who provides specific expertise?

#### Informed

Whose responsibility is it to manage stakeholder communications?

Who needs status updates and how should they be delivered? Whose responsibility is it to manage this?

#### Represented

Whose responsibility is it to ensure the impact group is represented?

How are you representing the voice of the impacted (Typically students/specific student groups)? Whose responsibility is it to ensure this?

### Template – Roles & Workstreams Chart

[Download template](#) ↓

Create and customize a chart according to the roles and workstreams you've determined for the project, using the legend below to fill in each role's responsibilities, ensuring that they are clearly documented and understood by all team members.

Depending on the complexity of the initiative and the number of stakeholders, you might choose to structure your chart by mapping workstreams against roles (the more common approach) or by mapping workstreams against responsibilities. While the latter is less common, it can provide a clearer overview for initiatives that involve many stakeholders at specific milestones rather than throughout the initiative.

	Team lead	Team member A	Team member B	Stakeholder 1 (Leaders)	Stakeholder 2 (Data person)
<b>Workstream 1</b> e.g. Stakeholder Communication	A, I, Rep	R	R	I	
<b>Workstream 2</b> e.g. Assessment and Evaluation	A, I, Rep		R	I	C, I
<b>Workstream 3</b> e.g. Student Voice & Feedback	I	R, Rep	I	I	C, I
<b>Workstream 4</b> e.g. Liaison to other teams	R, A, I	R, I	I	A, C	

**R**

Responsible for doing

**A**

Makes final decisions & is  
accountable for results

**C**

Consults with expertise  
before decisions

**I**

Needs information on  
progress

**Rep**

Represents impact group