

# 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

## Team Charter Template

### Why is this tool important?

The team charter provides a venue for clearly spelling out team principles, expectations, communication norms, meeting protocols and other baseline elements. Explicitly recording these elements is primarily a means for having open and clear communication of them across the team.

Once you have assembled your team, ensure the activity below is completed collaboratively. As the project lead, you can either facilitate the session yourself or bring in a third-party facilitator to guide the team.

**Tip** Having a third-party guide this activity can help ensure that all voices are heard and that the process remains neutral. This can be particularly beneficial if you anticipate conflicts or disagreements over the guiding questions.

Your team may have varying communication styles and preferences. Remain adaptable to these differences rather than forcing everyone into a single mold. Embracing diverse perspectives can unlock significant potential and creativity within the team.

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### Guiding Questions

## 1 What are the general rules of conduct the team agrees to abide by?

#### General rules

Which behaviors and practices does the team agree to uphold?

#### Accountability

What does accountability look like to our team?

How will we promote and ensure equity in our team?

#### Inclusion

Whose voices are not represented in the project team?

How will we mitigate this through stakeholder engagement?

## 2 How does the team plan to conduct meetings? What are the rules of engagement?

This includes who calls them, meeting format, frequency, and expectations for participation.

## 3 What are the rules and guidelines for how this team will communicate and engage with each other?

This includes both format and communication styles.

## 4 What is our process for addressing intra-team conflict?

How should it be communicated? What will trigger member removal?

## 5 If no or limited traditional compensation is available, how can we create a creative compensation plan for each team member? What do you hope to get out of participating in this project?

Examples include fostering investment via recognition/feedback loops (i.e., demonstrating that individual team members' efforts are shared within the team, upwards, and with the community).

This includes learning and growth goals – experience and responsibility rewards.

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## Project Title

### 1 Project values & principles

Answer

### 2 Meeting guidelines

Answer

### 3 Team communication

Answer

### 4 Navigating conflict

Answer

### 5 Compensation & incentives

Answer