



# Team Contract: *Defining an Operational Plan for Your Team*

Team Name: \_\_\_\_\_

Date: \_\_\_\_\_

Members: \_\_\_\_\_

## Purpose

This exercise guides your team through discussions that forge a “contract” among your members. You will negotiate shared understandings and record them for all members to see. This exercise also helps you receive instructor feedback on your contract to make it more effective.

## Part A: Importance of Team Processes

1. Discuss what is important to your team. Be sure that each member shares his/her perceptions on what makes a good team.
2. In the table below, check an importance level for each process to **rate** your team’s perception of its **importance** to team productivity. Use the definitions given below for rating importance.

Rating	Definition of Importance
Low	<i>Managing this process will not significantly affect the productivity of the team.</i>
Medium	<i>Managing this process may affect team productivity, but it is not crucial to productivity.</i>
High	<i>Managing this process is crucial for the team to be highly productive.</i>

Area	Team Process Name	Importance of Process		
		Low	Medium	High
Team Relationships	Building an inclusive supportive climate			
	Gaining buy-in and interdependence			
	Resolving conflicts to enhance teamwork			
Joint Achievements	Establishing shared team goals			
	Managing tasks to achieve team goals			
	Producing competent consensus outputs			
Member Contributions	Allocating responsibilities to members			
	Achieving quality work from members			
	Facilitating team member professional development			
Team Information	Achieving effective in-team communication			
	Managing stakeholder communication			
	Building shared knowledge assets			

## Part B: Team Operating Procedures

Prepare a team contract (or set of team bylaws) that defines your team's organizational structure and commits all members to agreed-upon operating procedures. This "contract" should emerge from substantive team discussions and from full member agreement. The team contract must be prepared as a formal agreement signed by all members and referenced regularly in the course of team business.

The team contract must address each of the following issues:

Roles and Responsibilities	Define roles that will be assigned within the team and the responsibilities of the person in each role. Define also who is assigned the role and any plans for review or reassignment of roles to achieve team and member goals. Specifically address roles for managing team progress and budget, conducting meetings, documenting team information, and communicating with project stakeholders. Also address issues of back-up for members needing help or encountering unexpected challenges.
Team Relationships	Define relationships that are expected among team members and the methods employed to establish and maintain these supportive relationships. Specifically address your establishment of an inclusive and supportive climate, gaining strong member commitments to success of all members, and ways in which conflicts will be handled constructively.
Joint Achievements	Define what is expected and methods the team will use to achieve high quality work done together (i.e., when members are working together on the same outcome). Specifically address establishing shared goals, planning and monitoring progress toward team goals, and conducting effective team meetings.
Member Contributions	Define what is expected from team members when conducting work individually. Define how individual work assignments will be made, by whom, and with what definition of expectations. Explain how work quality and timeliness will be monitored and enforced (be specific). As appropriate, describe a process by which the team will allocate credit and/or project assets based on member contributions. Also describe how members will be supported in their efforts to develop skills and abilities needed for the project.
Information Management	Define what is expected from team members regarding the recording and sharing of team information (e.g., ideas, drawings, meeting minutes, work status, problems, advisor communication). Specifically address the ways and frequency of keeping members and outside stakeholders informed. Also define how project information will be recorded and made available to members, but also guarded to protect confidentiality and support patentability.

A template for your team contract is attached. You may modify it to fit your team needs and preferences. Be sure to provide adequate detail to inform people of expectations and to provide a basis for evaluating teamwork and resolving differences. When your contract is completed and signed by all members, scan it to a pdf document for submittal to the instructor and for ongoing team reference.

# Team Contract *(template)*

## Section 1: Team Name and Mission

This team shall be known by the name:

The mission of this team is to . . .

## Section 2: Membership

Membership on this team includes the following people . . . . Others may join the team by . . . . Members may leave or be removed from the team by . . . .

Members of this team shall be responsible to . . . . Members may not . . . .

## Section 3: Roles and Responsibilities

Roles are assigned to members of the team to provide structure for team activities and to authorize individual members to conduct designated business in the name of the team. Roles are assigned (how) and for periods of (what) for the purposes of (what). Individual will be assigned to roles based on (what considerations). In the event of a role vacancy, the team will . . . . Roles and associated responsibilities are defined below.

3a. Team Leader/Manager/Chief: \_\_ (person's name, if appropriate) \_\_\_\_\_

The team leader is to (general description). Specific responsibilities of this person are to (list with specific details).

3b. (additional role): (name)

## Section 4: Team Relationships

Relationships among team members must support full and respectful engagement of all members for the benefit of the entire team. To this end, team members will . . . .

## Section 5: Joint Work

5a. Purposes of Joint Work

Team members will work together to establish collective goals and to produce decisions and work products that advance teamwork and project success. When working together, members will . . . .

5b. Team Meetings

Team meetings are an important example of working together. Meetings of the entire team will be held (when) at (where), or as called by \_\_\_\_\_. In order to make team meetings productive and rewarding for all members, they will be conducted . . . .

## Section 6: Individual Work

Team members are expected to work alone in many cases to complete work important to the team. Work assignments will be made (how and by whom). Assignments will include definitions of expectations that include . . . .

Work quality, alignment with team needs, and timeliness are vital to the success of the team. To ensure that team member contributions provide value desired by the team, . . . . Individuals failing to meet expectations will face the following consequences: \_\_\_\_\_. The team will assist members in their success by . . . .

## Section 7: Documentation and Communication

The team must maintain timely and accurate documentation of its individual and collective achievements, while also communicating needed information to one another and key project stakeholders.

### 7a. Documentation

Team members will maintain the following records of their work . . . (in what form). Confidentiality and legality of records will be ensured by . . . .

### 7b. Communication among Members

Team members will keep one another informed about (what) by (what)

### 7c. Communication with Outside Stakeholders

Outside persons, including \_\_\_\_\_, will be kept informed about (what) (when). When confidential information is involved, . . . .

## Section 8: Ownership of Team Assets (This may be optional)

An initial allocation of 10% preferred shares will be set aside for the initial team membership. The initial distribution of this percentage will be equally divided. An additional 10% of preferred shares will be allocated to team members for contributions over the course based on performance which will be valued by ... (state process for valuation)

## Section 9: Conflict Resolution

The team will strive to resolve conflicts quickly and to the satisfaction and benefit of everyone involved. To this end, the team will . . . .

## Section 10: Amendments

Amendments to this team contract may be made with the approval by all members of the team. Proposed amendments must be . . . . The amended contract must be distributed to all members and submitted to the instructor before becoming effective.

## Section 10: Affirmation of Compliance

We, the members of this team, affirm that we have established this contract with input and consensus of all members. By our signatures, we commit to compliance with the contract for the benefit of all members and the team as a whole.

Name	Signature	Date