# Capstone Team Formation

## Purpose

In order for a design team to perform at a high level it is important to establish: your team identity, ground rules, expectations, and goals that define your ‘culture’. This session is intended to generate discussions and written consensus among team members about different elements of productive team relationships. You will negotiate shared understandings about team operation and record them in the form of a ‘contract’ for all internal stakeholders to refer back to throughout your project. You should plan to get instructor feedback on the first draft of your contract during your first instructor/team meeting. Additionally, there are prompts for things you should be doing over the next week to prepare for your project and client interview.

## Kick-Off Meeting Tasks (before dispersing)

1. Identify a team recorder. This may be just for today, for the whole project, or can rotate periodically. Have the team recorder take minutes for the meeting today (decisions made, assignments, action items and due dates, etc.).
2. Introduce yourselves to one another, your lead instructor and mentor. If it is required for your project, and wasn’t already submitted in your bid portfolio, sign the Student Activity Participation (SAPA). Give this to the lead instructor for your project.
3. Take up to five minutes to brainstorm a clever/tasteful team name. This should appeal to your peers, your client, and your mother. Your lead instructor will use this to create a team email alias ([engr-\_<teamname>\_@uidaho.edu](mailto:engr-_%3cteamname%3e_@uidaho.edu)).
4. Compare schedules with your team members and identify suitable times for weekly meetings. Then discuss this with your lead instructor (and mentor) to nail down a weekly meeting time and location. Your team should also come up with times for a second/third weekly meeting without the lead instructor/mentor.
5. Identify which team member will type up and send out the agenda prior to your first meeting. This should be emailed as part of a meeting reminder that goes out to your team members, mentor, and lead instructor. In the future this will be sent to your team email alias once that is created.
6. Check with your lead instructor to see if they have contact information for your client as well as any additional background information. Figure out available times in the next week where your team is available for a client interview. Check to make sure this also works with your lead instructor.
7. Begin discussions with the team about your team contract (or set of team bylaws). On the Mindworks capstone under **RESOURCES 🡪 Guides for Success** there is a file to help create your team contract. You should plan on having a working draft of your contract before your first team/instructor meeting.
8. In the “Teaming Table” in this document, have each team member rank their abilities in each of the teaming processes by adding their initials to the appropriate box. Discuss implications of this information, and how you can use it to help the team perform better.
9. Review today’s work with your lead instructor before you leave class. Make sure each team member has contact information from the back page. Remove the back page (Teaming Table and Contact Information) and give it to your lead instructor.
10. Discuss and assign all the pre-meeting tasks (next page) to team members.

## Before Your Next Meeting

If you’ve talked to any capstone team in April and asked them if they wish they had more time, nearly every team wishes they had one, two, or even three more weeks before EXPO and project delivery to their client. Right now is when you have the most ability to influence your two-semester project schedule. Purposeful (not rushed) actions over the next few weeks will pay large dividends in available time later on. Before your next (first official) team meeting you should have the following tasks completed. Discuss these tasks with your team members today and make assignments for who will work on them, when they will be completed, and how they will be disseminated to the group.

## Pre-Meeting Tasks

1. Type up your team contract. Bring printed copies for each team member and your lead instructor to your first meeting.
2. Create an agenda for your first team meeting, and circulate to the team/instructor/mentor beforehand.
3. Make an entry in your personal logbook. Remember to put your name and team name on the cover, your teammates contact information on the inside, and leave several pages for your table of contents.
4. Have one team member contact your client (and cc or send a summary to the team). Briefly introduce your team, and start the conversation to pin down a time for the client interview. Figure out if this will be a site visit, phone conference, or some other format. Make sure that this is scheduled during a time that all the team members and the lead instructor can attend.
5. Identify the person on your team that will be the budget/finance liaison. This person should establish contact with the administrative assistant in the department that will be managing the budget. They should figure out the spendable amount of the budget that the capstone team will have for the project. If there are going to be any expensive single items ordered, they should get information on the formal bid process that must be done through UI purchasing.
6. Discuss with your lead instructor if your project is going to be using any of the laboratory spaces (machine shop, power lab, etc.), or spaces that require special training (chemical handling, painting, SDS paperwork, etc.). If necessary for your project, set up the training sessions asap.
7. Doing whatever background research you can about your project (discussion from the project fair, project description, company background information, etc.), start putting together the set of questions you are going to ask as part of the client interview. Additionally, come up with your strategy for how you are going to keep a record of the interview.
8. Decide on how you will break up group tasks. Who will record and circulate minutes? Will this be a year-long role, or will the responsibility rotate? Will one member be a primary point of contact with your client? How will your team assemble and keep up to date with your portfolio? Who will be the wiki-master for your group (web documentation)?
9. What will you use to plan and track your project progress? Record known class deadlines/milestones. Set key project milestones. Add additional (realistic) intermediate milestones. Which member(s) of the team will be responsible for tracking progress? What is the team strategy for ensuring milestones are met, and what will be done if/when aspects of the project are slipping in to ‘yellow’ or ‘red’ status?

Teaming Table:   
Use the table below to generate discussion amongst your team members about past teaming experiences. Each member should put their initials in the box they feel best represents their abilities in each process.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Teamwork Area** | **Supporting Processes** | **Individual Rankings** | | |
| **I struggle with this** | **I’m okay in this area** | **I excel at this** |
| **Team Relationships** | Building an inclusive supportive climate |  |  |  |
| Gaining buy-in and interdependence |  |  |  |
| Resolving team conflicts |  |  |  |
| **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 growth |  |  |  |
| **Team Communication** | Achieving effective in-team communication |  |  |  |
| Managing stakeholder communication |  |  |  |
| Building shared knowledge assets |  |  |  |

# Team Identity and Contact Information

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

Weekly Team Meeting Time/Place: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructor Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Member Name & Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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\*\*Mark which member will create and distribute the agenda before the first team meeting\*\*