**Team Name**

**Team Operating Agreement**

|  |  |
| --- | --- |
| **Project or Team:** | **xxx** |
| **Author:** | **xxx** |
| **Version:** | **xxx** |
| **Revision Date:** | **xxx** |



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# Overview

(Delete all instructions and update table of contents prior to finalizing document.)

This document is used to create a clear, shared understanding of how this team will operate. A meeting should be held amongst all team members to create and refine each point, so that the results are a group effort for which all team members share ownership.

This plan will document this team’s agreement around:

Add or remove areas as necessary. Please note that in a large project, some of these areas may be covered in other project documents.

* Ownership of project outcomes
* Ownership of specific outcomes
* What we value
* How we make decisions
* How we communicate
* How we work through problems
* How we express our commitments
* Other important agreements

# Team Definition

Please write a sentence or two to describe this team’s working arrangement, for example, is this a project team, a workgroup, a standard operational team.

This document will describe the operating agreement of the NNN team, which is …

Table 1: Team Membership

| **Name** | **Role** |
| --- | --- |
|  |  |
| xx | xx |
|  |  |
|  |  |

# Ownership of Project Outcomes

These can represent the high-level outcomes or expectations of the team.

During this project, we all agree to own the following outcomes:

1. Outcome 1
2. Outcome 2
3. Outcome 3

# Ownership of Specific Outcomes

For any outcome that is owned by a specific person, you may further define the parameters around that here. Replace example values in the matrix with your team’s information.

During this project, some individuals and groups will own specific outcomes:

Replace example values in the matrix with your team’s information.

Table 2: Outcomes Ownership

| **Name** | **Outcome** | **Why It Matters** | **Success Measures** |
| --- | --- | --- | --- |
|  |  |  |  |
| Owner | Verbal picture of the desired future state | Impact on stakeholders | Objective, if possible |
|  |  |  |  |
|  |  |  |  |

# What We Value

Replace example values in the matrix with your team’s information.

During this team engagement, we all agree that we value the following:

Table 3: Values

| **Value** | **Why It Matters** | **Exceptions** | **Example of this value in action** |
| --- | --- | --- | --- |
|  |  |  |  |
| A blame-free environment | To maintain a focus on solutions | Intentional negative actions | Any team member should eagerly point out an error (theirs or anyone else’s) while focusing on optimizing the outcome, without concern for blame |
| Quality over schedule |  |  |  |
| Long-term results |  |  |  |

# How We Make Decisions

Replace example values in the matrix with your team’s information.

During this team engagement, we all agree that we will make decisions using the following rules:

Table 4: Decision-Making Rules

| **Rule** | **Why It Matters** | **Exceptions** | **Example of this rule in action** |
| --- | --- | --- | --- |
|  |  |  |  |
| Fact-based decision-making | To make decisions that have a solid basis | When only subjective measures exist | Team members should always strive for objective measures of success when possible, so that judgments can be agreed upon more easily. |
| We will vote when… |  |  |  |
| The Project Manager has the right to… |  |  |  |
| The team member has the right to … |  |  |  |

# How We Communicate

We agree to use our best efforts to meaningfully participate in conversations among team members and to follow the guidelines below:

These points are here to get your team started on thinking about these. Please change as fits your team.

* In general, each team member should work to create an open and frank dialogue that allows for exploration of different points of view.
* In every conversation, particularly in groups, one person speaks at a time.
* Everyone will listen closely, with a positive attitude, for opportunities to add substance to the conversation.
* We will focus on the issues involved, rather than preconceived motives, based on relationships and personalities.
* We agree to avoid side-conversations or interruptions while someone is speaking.
* In order to give everyone a chance to talk, participants will be sensitive about the length of comments and encourage participation from all group members.
* Once an agenda has been agreed upon, it is important to follow it and only change it by group decision.

During this project, we all agree that we will communicate using the following methods:

Replace example values in the matrix with your team’s information.

Table 5: Communication Methods

| **Method** | **Why It Matters** | **Exceptions** | **Example of this method in action** |
| --- | --- | --- | --- |
|  |  |  |  |
| Weekly In-person meetings for issue management and problem solving | In person meetings help us collaborate effectively | Problems that only involve one team member and the PM | We need to fully assess the impact of a changing requirement that touches multiple parts of the project. |
| Online chat for quick Q&A between team members |  |  |  |
| Teleconferences for status reporting |  |  |  |
|  |  |  |  |

# How We Work Through Conflicts

Replace example values in the matrix with your team’s information.

During this team engagement, we all agree that we will iron out our differences using the following methods:

Table 6: Conflict Resolution

| **Method** | **Why It Matters** | **Exceptions** | **Example of this method in action** |
| --- | --- | --- | --- |
|  |  |  |  |
| We escalate issues when they have not been resolved within 48 hours | We must resolve issues quickly to keep the project moving forward efficiently. | None. | A new resource conflict must be reported to the PM as soon as possible. |
| We table issues presented during status meetings so that they can be resolved separately. |  |  |  |
| We avoid interpersonal conflicts by… |  |  |  |
|  |  |  |  |

# How We Express Our Commitments

We understand our commitment to the vision, values and purpose of the [project, team engagement, other]. We all commit to:

These points are here to get your team started on thinking about these. Please change as fits your team.

* Regular attendance of meetings and full and honest engagement in the process.
* Problem solving and decision-making through a consensus model, realizing that voting is an option of last resort to resolve extreme conflicts and where the [project manager, team leader, business analyst, other] can accept either decision.
* Engage in an ethical manner, follow all pertinent laws and to act in best faith.

During this engagement, we all agree that we will commit to specific actions using the following methods:

Replace example values in the matrix with your team’s information.

Table 7: Commitments

| **Method** | **Why It Matters** | **Exceptions** | **Example of this method in action** |
| --- | --- | --- | --- |
|  |  |  |  |
| We will commit in writing when the commitment is mission critical, potentially impacting the schedule, budget or scope of the project. | It could affect the successful outcome of the project. | None. | When an individual takes over responsibility for a producing a key deliverable mid-project, they must send an email to the PM accepting responsibility for delivery. |
| We will commit verbally when… |  |  |  |
| Commitment will be assumed when… |  |  |  |
|  |  |  |  |

# Other Important Agreements

Replace example values in the matrix with your team’s information.

During this team engagement, we all agree to the following:

Table 8: Other Agreements

| **Method** | **Why It Matters** | **Exceptions** | **Example of this method in action** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Signoffs

The members of this team have agreed to the abide by the parameters defined within this document.

It is best if everyone on the team formally agrees to the contents of this document. Copy/paste your team membership here. In the digital world an ink signature certainly isn’t required. eSignatures are acceptable, as are document workflows, or email confirmations. Please note in the signature box how a person formally agreed.

Table 9: Signoffs

| **Name** | **Signature or formal agreement details** | **Date** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |