

**NOTRE DAME EXECUTIVE MBA  
SAMPLE TEAM CHARTER**

1. Get to know each other well. Take the time to let each team member introduce themselves including their professional and personal background information (family, leisure activities, etc).
2. Review Dr. Grant's personality style information and share MBTI styles on "Psychological Types: Leveraging Synergy, Customizing Support" worksheet.
3. Complete the goal worksheets.
4. Discuss how to deal with success and conflict.
5. Understand that the team will go through cycles including a storming period where you will get to know each other and each other's styles.
6. Conflicts should be handled within the team. The entire team should meet to address issues and then put in place steps to resolve problems. Reflection on how to improve should be practiced by each team member.
7. The Executive MBA Program administration can be brought in to help directly facilitate conflict resolution *after* the team has met, discussed the conflict, and applied their resolution steps as outlined in Recommendation 6. Please note that we recommend that the administration be kept aware of issues that affect academic performance regardless of whether the team asks for direct assistance.
8. Complete the Team Charter. An electronic copy must be submitted to Anne Wieber ([awieber1@nd.edu](mailto:awieber1@nd.edu)) by **Friday, August 28**.

## SAMPLE Goal Worksheets

| Professional Goals |  |   |
|--------------------|--|---|
| Member Name        |  | Goal 1: To obtain my CPA certification within 1 yr. of graduation.  |
|                    |  | Goal 2: To obtain a promotion at my organization prior to graduation.   |
| Member Name        |  | Goal 1: Gain deeper knowledge of Marketing in the formal education setting while gaining exposure to and a basic understanding of financial aspects of a company. |
|                    |  | Goal 2: Build relationships with teammates and classmates to gain insight into the industries in which they work as well as their various functions.              |
| Member Name        |  | Goal 1: Enhance and hone my leadership skills and my managerial point of view in order to more positively affect my team and my organization.                     |
|                    |  | Goal 2: Continue to find new challenges and opportunities for both me and my team in order to assist all of us in furthering our careers.                         |
| Member Name        |  | Goal 1: Continue to find new and challenging opportunities that will develop my leadership skills and help form my opinions and views of success.                 |
|                    |  | Goal 2: Continue to drive with the excitement and passion to contribute to an organization that is truly making changes led by ethical guidelines.                |
| Member Name        |  | Goal 1: My primary objective with my organization is to become the Executive Vice-President of North American operations.   |
|                    |  | Goal 2: My secondary objective is to develop my analytical assessment skills to assist my understanding in my current and future job responsibilities.            |
| Member Name        |  | Goal 1: To gain exposure to all aspects of business and what are the key aspects that make a successful business.   |
|                    |  | Goal 2: To build relationships and learn from my classmates business experiences, along with bringing my expertise to share.                                      |

| Personal Goals |  |   |
|----------------|--|---|
| Member Name    |  | Goal 1: To spend at least two days a month with family (Sundays)  |
|                |  | Goal 2: To develop an accounting workshop to tutor my team.   |
| Member Name    |  | Goal 1: Build relationships with members of my core team and classmates to establish friendships and a network of individuals with whom I share a commonality as an ND graduate.                        |
|                |  | Goal 2: To grow spiritually by being part of a faith-based education; to enjoy the Notre Dame campus experience and to contribute toward the spirit of Notre Dame.                                      |
| Member Name    |  | Goal 1: To truly take advantage of the valuable time I have with my team mates and classmates to expand my professional network and understanding of various industries.                                |
|                |  | Goal 2: To use my education to better my life and the lives of those around me...family, friends, co-workers and my community   |
| Member Name    |  | Goal 1: To maintain a healthy balance between work, school, and family so that I can continue to grow in all areas of my life during this educational experience.                                       |
|                |  | Goal 2: To leverage this opportunity to expand my personal and professional network so that I am able to expand my horizons in knowledge and friendships.   |
| Member Name    |  | Goal 1: I want to use my experience at Notre Dame to become an exemplary role model both at home and at work with my wife, children, co-workers and staff.  |
|                |  | Goal 2: I want to challenge myself to become more of a leader in action and thought with my family and co-workers   |
|                |  | Goal 3: I want to graduate the Notre Dame EMBA program with Honors.   |
| Member Name    |  | Goal 1: To continue my journey of faith based learning.   |
|                |  | Goal 2: To take what I learn, and apply it to my real world business. I also want to take the skills that I learn and help others that are less fortunate than I am and don't have a quality education. |

| Educational Goals |  |  |
|-------------------|--|--|
| Member Name       |  | Goal 1: To participate 100% with all team projects   |
|                   |  | Goal 2: To present at least two group project results to class   |
| Member Name       |  | Goal 1: To <u>ENJOY</u> learning in a non-threatening environment  |
|                   |  | Goal 2: To be an active contributor among my team and classmates by sharing knowledge, thus contributing toward other people's success |

|             |  |   |
|-------------|--|---|
| Member Name |  | Goal 1: To fully take advantage of the special environment I am a part of at Notre Dame by being open to all ideas, opinions, and experiences that my classmates and professors are willing to share.         |
|             |  | Goal 2: To be an active member of the class by sharing my experiences, thoughts, and participating in class events.   |
| Member Name |  | Goal 1: To take advantage of this opportunity by expanding my existing knowledge with the curriculum while leveraging my experience that I have gained in my career to allow me to advance on my career path. |
|             |  | Goal 2: Take advantage of the access that I have to professors to discuss current situations that I find myself in to better understand how I am able to navigate and manage my why to clarity and success.   |
| Member Name |  | Goal 1: I want to have a more thorough understanding of practical quantitative business strategy and fundamentals for structuring real world solutions.   |
|             |  | Goal 2: I want to become an active part of the Notre Dame culture and community by participating in school events, both socially and spiritually.   |
| Member Name |  | Goal 1: I want to gain knowledge from and contribute to Top Tier professors and classmates.   |
|             |  | Goal 2: I want to bring the knowledge that I have acquired during my career and offer it to others in the program so that we each learn from one another.   |

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| Team Goals  |  |  |
| Member Name |  | Goal 1: 100% graduation rate of team   |
|             |  | Goal 2: To participate in at least three fun team networking events.   |
| Member Name |  | Goal 1: To contribute fully to a cohesive team that values having FUN while learning and producing high-quality work.  |
|             |  | Goal 2: To work as a high-functioning team by leveraging each others strengths and working <i>with</i> our differences as opposed to against them.                               |
| Member Name |  | Goal 1: To forge meaningful and lasting relationships with all of my team members on both a personal and professional level.   |
|             |  | Goal 2: To leverage the strengths of the team to ensure every single team member succeeds and achieves their personal goals.   |
| Member Name |  | Goal 1: To be an active and contributing member of the team that will both challenge and support the advancement of the team.  |
|             |  | Goal 2: To over deliver on my commitments to the team, which includes coming to team meetings prepared with an open mind and my contribution fully prepared and thought through. |
| Member Name |  | Goal 1: I want to develop a long-lasting personal relationship with each one of my team members.   |

|             |  |   |
|-------------|--|---|
|             |  | Goal 2: I want to leverage the collective strengths of each team member to increase my knowledge and understanding of practical solutions to problems and projects.   |
| Member Name |  | Goal 1: There is no "I" in team so I look forward to working closely with my team to ensure we all have a positive experience and help one another whenever possible. |
|             |  | Goal 2 I hope to build relationships that will last the rest of my life.  |

## SAMPLE Executive MBA Team Charter

|  |  |
|--|--|
| Team Name and<br>Number  |  |
| <div style="text-align: center; margin-bottom: 10px;">Member Name</div> <div style="text-align: center; margin-bottom: 10px;">Member Name</div> <div style="text-align: center; margin-bottom: 10px;">Member Name</div> <div style="text-align: center; margin-bottom: 10px;">Member Name</div> <div style="text-align: center; margin-bottom: 10px;">Member Name</div> <div style="text-align: center;">Member Name</div> |  |

Overall group philosophy/approach:

Our team philosophy is encompassed in the word TEAM, Together Each Achieves More. The team believes that we will achieve more rather than an individual when taking on the challenges of the program. We believe that each individual brings key learning's from experiences and education that will be leveraged to raise the knowledge of the other individuals on the team. The team environment will provide opportunities to develop additional skills beyond just what is learned in the class room and the text. Individuals will be able to develop their leadership skills, interpersonal skills and emotional intelligence.

Our approach is clear and strait forward we expect team members must be ready, willing and able to: Participate fully in team meetings, Complete tasks in preparation for team meetings, Make decisions based on facts and data, Keep an open mind when considering alternatives, Commit to projects, and Commit to involvement with the entire process. The team will identify a leader for each segment of work that will guide the team in discussions and or review of work products. The leader will be based on personal interest in leading a given segment.

## Communication Protocol

### Meetings

Our team will meet twice a week on a regular basis. We will have a conference call every Monday evening at 8pm. On non-class weeks we will also have a conference call at 8pm on Thursday evenings. On class weeks the second weekly meeting will be in-person Friday evening after class. The team will also meet as needed for specific projects.

### Online rules (email, web chat, etc.)

- Use preferred email addresses to email teammates
- Team makes a commitment to each other that we don't read work emails or conduct other online work during the team calls
- Respond to / acknowledge emails from teammates within 48 hours of receipt

### Telephone (i.e. do not call after x hour)

- Team has one call-in number that is used during an entire Progression
- If a team member has a last-minute conflict, they should report it to \_\_\_\_\_
- Teammates don't call each other after 9:30 pm
- Teammates should plug all 6 of teammates' cell phone numbers in their cell phones to facilitate ease of communication

### Project Leadership

Overall one Project Leader is to be assigned to manage each team project. Team assignments will be aligned with a project lead (e.g., Accounting Group Projects) in accordance with functional specialty. Where applicable, team members with interest may request ownership of specific tasks that are to be completed at an agreed upon timeline by the overall group, and submitted to the Project Leader. The Project Leader will be responsible for:

- Assigning tasks to team members:
  - Task may be voluntarily requested, or
  - Distributed randomly to the team by the project lead
- Reviewing individual task assignments for completeness and accuracy
- Facilitating collaboration and team review
- Submitting the completed assignment on behalf of the team to the professor

Each project should have tasks assigned to all team members to ensure 100% participation by members. Where possible, individuals that have interest in learning a specific topic should request task assignments that will promote development in that area.

Refer to the “Conflict Resolution” section for determining project leadership assignments

## Roles and Responsibilities

Team \_\_\_\_ commits to the following group and individual roles and responsibilities as defined below for team meetings, projects and assignments.

### **ROLES**

Each Team Member will be responsible for setting a SMART Plan for completion of each team task (Specific, Measurable, Actionable, Realistic & Time bound Plan) as described by the Project Leader.

To aid in study and communication for all team members, we recommend that we have a Team Note Taker for Class discussion and a Team Note Take for Meetings.

Class Note Taker  
1.

Meeting Note Taker  
1.

### **RESPONSIBILITIES**

The primary responsibility of each member in the group is listed below:

1. Leverage Personality Styles to Increase Team Synergy
2. Aid in Team Learning & Understanding
3. Review Current Projects and Timeline for Completion
4. Review Current Team/Individual Assignments and Timeline for Completion
5. Review/Prep for Upcoming Quizzes and Tests

The team will also commit to each member individually to the following:

1. Be Fully Present in All Team Meetings and Discussions
2. Allow All Members to Fully Present Ideas & Thoughts
3. Leverage Personality Style to Overcome Roadblocks in Learning
4. Assist Fellow Team Members in Learning Growth Areas



Conflict Resolution

Our team will be together for the whole program and as such we must respect our team mates and keep an open mind if we find ourselves in conflict with one another. Below are some rules which I suggest we follow if we find ourselves in conflict.

- 1) One person speaks at a time.
- 2) We will make a sincere commitment to listen to one another, to try to understand the other person's point of view before responding.
- 3) What we discuss together will be kept in confidence, unless there is explicit agreement regarding who needs to know further information.
- 4) We agree to talk directly with the person with whom there are concerns, and not seek to involve others in "gossip" or "alliance building."
- 5) We agree to try our hardest and trust that others are doing the same within the group.
- 6) We will support the expression of dissent in a harassment free environment.
- 7) We agree to attack the issues, not the people with whom we disagree.

If we find that the team cannot come to agreement, the team shall vote on resolution and majority vote shall rule. Each team member must vote (in person or over the phone).

If a team member is so counter-productive that they jeopardize the success and existence of the team, at least one member of the team will ensure the unproductive team member is aware of the negative situation. In addition, at least one member will provide coaching to the unsuccessful team member. If the situation does not improve, and the remainder of the team unanimously feels there is no resolution, then the team will approach the program Director for resolution assistance.

**Signatures:**

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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