**The roles of project lead/co-lead, steward, and assistant are identified with specific tasks, but some tasks may need to be delegated based on project needs. The consolidated list below is provided as a delegation tool for projects that have atypical organizational structures or special circumstances.**

| **TASK** | **TYPICAL ROLE** | **DELEGATED TO** |
| --- | --- | --- |
| 1. Prepare for Meetings:    1. Design and provide meeting agendas and supporting materials in advance using the agenda template    2. Create agendas that support the charter of the group with an approach designed with a clear beginning, middle, and end that utilizes participation of the members    3. Prepare meeting facilities, materials, and equipment in advance for active participation by members | Lead and/or co-lead |  |
| 1. Leading Meetings:    1. Facilitate group understanding of the global participation charter and the action charter for the project    2. Seek participation to ensure all members have a voice on issues and decisions    3. Provide guidelines and constraints to help keep the meeting focused and on track towards achieving its goals and desired outcomes    4. Use questions to create an environment of continuous improvement    5. Engage differences of opinion, perspective, and viewpoint    6. Verbally and/or visually communicate group reflections and agreements    7. Guide the group to achieve meaningful consensus on issues addressed    8. Facilitate the recording of key discussion points, agreements, action items, and relevant context in meeting records/notes using the notes template    9. Facilitate achievement of the outcomes established in the project’s action charter | Lead and/or co-lead |  |
| 1. Following up on Meetings:    1. Provide continuity between meetings to ensure the group learns and evolves together    2. Distribute meeting records in a timely manner    3. Complete actions as requested by group | Lead and/or co-lead |  |
| 1. Communicate the project to various stakeholders, and when appropriate, solicits feedback on draft deliverables | Lead and/or co-lead |  |
| 1. Submit the final deliverables to the sponsoring council which would make a recommendation to the Executive Leadership Team (ELT) | Lead and/or co-lead |  |
| 1. Draft the project’s action charter in consultation with the sponsoring council’s chairs; non-steward project leads and/or the college president may also participate in the initial meeting which guides the direction of the charter | Steward (lead, co-lead, or other person) |  |
| 1. Estimate the amount of work involved with the project | Steward (lead, co-lead, or other person) |  |
| 1. Develop a preliminary work plan based on the charter that organizes, sequences, and schedules the work that needs to be completed by the project team within the chartered time period | Steward (lead, co-lead, or other person) |  |
| 1. Collaborate with any non-steward project leads (when available) to revise and refine the work plan prior to the start of the project team meetings | Steward (lead, co-lead, or other person) |  |
| 1. Conduct preliminary research to gather information on promising practices, product options, or other relevant materials which might serve as resources at the beginning of the project | Steward (lead, co-lead, or other person) |  |
| 1. Track progress of the project against the work plan | Steward (lead, co-lead, or other person) |  |
| 1. Assess risk and provide status reports on project progression to the sponsoring council (i.e, basic project management reporting, not detailed reporting of the team’s activity) | Steward (lead, co-lead, or other person) |  |
| 1. Maintain and adjust the work plan file as needed in coordination with any non-steward project leads while acting as a gatekeeper for change control | Steward (lead, co-lead, or other person) |  |
| 1. Assist the project leads as needed with other project management tasks specific to the type of project (e.g., organizing the mechanics of a “go live” simulation) | Steward (lead, co-lead, or other person) |  |
| 1. Attend project meetings as a resource; intent is that the project steward would be an objective resource unless also serving as a project lead | Steward (lead, co-lead, or other person) |  |
| 1. Archive project documentation at the conclusion of the project | Steward (lead, co-lead, or other person) |  |
| 1. Any related project management work tasked by the sponsoring council (e.g., explaining archived project documentation to a future project lead/steward who will be involved with implementing a proposed model) | Steward (lead, co-lead, or other person) |  |
| 1. May assist the council co-chairs in conducting an evaluation at the conclusion of the project | Steward (lead, co-lead, or other person) |  |
| 1. Serves as the primary note taker for all scheduled meetings using the ARC document repository as the note archive | Assistant |  |
| 1. Reserves conference rooms and other facilities as needed; makes arrangements as needed for room layout, media, supplies, and other details | Assistant |  |
| 1. Schedules meetings and participants (including invited guests) via Outlook; updates schedule when necessary to keep participants informed of meeting times and locations | Assistant |  |
| 1. Assists with compiling agenda packets; distributes information to members in preparation for and during meetings | Assistant |  |
| 1. Assists with coordination of events such as kickoffs, summits, or study sessions | Assistant |  |
| 1. Other reasonably related clerical support | Assistant |  |

The role of project team members would not be delegated, but for reference it is defined in the ARC Governance Framework:

