

TOOL

Team Member Roles and Responsibilities



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Team Member Roles and Responsibilities

Purpose

This tool outlines key roles that support effective team meetings and collaboration. It helps teams clarify responsibilities, ensuring meetings are focused, inclusive, and productive.

When to Use

You can use this tool when setting up team structures, when meetings feel unfocused or unproductive, or when you want to increase shared ownership and participation. It is especially useful when launching a new team or resetting how a team operates.

How to Use It

Review the roles (Facilitator, Timekeeper, Recorder, and Process Observer) and their responsibilities, and determine which roles are needed for your team. Assign roles for each meeting, rotating them over time to build shared capacity and ownership. Clarify expectations for each role before the meeting begins. During and after meetings, reflect on how the roles supported (or didn't support) the group's effectiveness and make adjustments as needed. Use the process observer role and prompts to deepen awareness of group dynamics, participation, and alignment to norms.

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The Facilitator

Purpose: To help the group achieve meeting objectives during the given time frame.

Facilitator's Role and Responsibilities:

- Create or co-create the agenda, or preview the agenda ahead of time. Facilitator must be clear on the objectives or outcomes.
- Listen actively to all participants and periodically summarize as needed.
- Check for shared understanding in group.
- Keep the group focused on the topic.
- Refer to the objectives of the meeting in order to keep the group focused on the outcome.
- Identify the components of the agenda: for example, discussion, brainstorm, decision-making, announcement.
- Determine whether the agenda needs to be altered based on the needs of the group and checks for consensus on making those adjustments.
- Remind the group of the agreed upon norms when necessary.
- Manage unproductive conflict and power dynamics.
- Keep a list of people waiting to speak and facilitate the order of discussion.
- At the end of a section or of the meeting, review decisions and commitments made during the meeting, review items postponed for future meetings, and ask for process observations.

Tips:

- The facilitator role can also be shared between two people. For example, one facilitator can keep track of speakers, to-do items, and commitments that individuals make.
- A co-facilitator is also useful when there's a decision to be made about the components of the agenda because the two facilitators can confer and make a shared decision.

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The Timekeeper

Purpose: To monitor the group's adherence to the times laid out on the agenda.

Timekeeper's Role and Responsibilities:

- Establish an agreement with the facilitator about how to communicate—verbally or non-verbally.
- Let the group know when time is running out or has expired for each agenda item.
- Work with the facilitator to renegotiate time frames as needed.

The Recorder

Purpose: To capture the meeting.

Recorder's Role and Responsibilities:

- Records major decisions and action items without adding opinions.
- Takes more detailed notes of a discussion if requested by the facilitator or group.
- Checks with participants as needed to ensure accurate recording.
- Distributes typed notes to the group within a specified time period.
- Archives all agendas, handouts and notes in an agreed upon location.

Tips:

- Make sure the recorder knows whether the expectation is that everything said during the meeting is written down or only the main decisions and next steps.

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The Process Observer or Process Checker

Purpose: To help the group gain more awareness of its group dynamics so that it can accomplishing its goals.

Process Observer's Role and Responsibilities:

- **Community Agreements:** The process observer pays attention to how the group honors its community agreements. The process observer can do this by affirming behaviors that are consistent with the norms and naming behaviors that don't uphold the norms.
- **Participation:** The process observer can track who talks, how long people talk, who doesn't talk, and any patterns in participation that might be important, such as female team members participating more than male team members. The process observer can also record the nature of each person's participation, for example, whether the contribution was a question, an opinion, a clarification, an assertion, a criticism, or an attempt to facilitate or problem solve.
- **Decision-Making:** The process observer can note how decisions are made (whether by the facilitator's discretion, by the demands of one person or a small group, or by group agreement). The process observer might also simply name when decisions are being made—often a group is not cognizant of decisions being made.
- **Tone:** The process observer might also pay attention to the general tone of conversations (if this is something the group is working on) and offer specific examples to support an observation. For example, the process observer might pay attention to moments when the team is collaborative or antagonistic.

Operating Guidelines:

- The process observer can offer observations on how the team upheld the norms during the meeting or at the end of it. How and when the process observer will make observations should be communicated at the outset of the meeting.
- The process checker can use a rubric, if the team has one, to note how the group works together.

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A process check is

1. Evidence based—observations are about specific behaviors.
2. A way to name behaviors in relation to shared agreements.
3. A time to reveal patterns of participation.
4. A time to raise challenging and sometimes hard questions to the group connected to shared purpose and agreements.
5. An opportunity for the group to listen openly.

Examples of Process Check Prompts:

1. A norm we seem to be holding well is...
2. A norm we seem to struggle with is...
3. Some patterns of communication that I noticed were...
4. Some of the non-verbal communication that I noticed was...
5. Frustration seemed to increase when....and decrease when...
6. People seemed more engaged when...and less engaged when...
7. Our ability to make decisions seemed to increase when...and decrease when...
8. We seemed to get stuck when...

Tips:

- It can be useful to have a second process checker who supports the primary process checker, catches things that might slip past them, and who pays attention to the process checker's participation.
- Everyone in the team can be invited also to pay attention to process and to offer their insights at any time.

A process check is not

1. A time for blame or judgment.
2. A time to challenge specific individuals in the group or the team leader.
3. Focused on meeting content.
4. Time to present proposals.

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