DEFINING YOUR TEAM CHARTER

The Pillars
Organizational Effectiveness

WHAT IS A TEAM CHARTER?

Why does your team need a team charter?

Teams that have effective team charters benefit from clarity in their purpose, aligned goals and clear desired outcomes. The clarity and alignment created by a team charter allows for increased performance and higher levels of overall engagement and positive results.

What goes into a team charter?

A team charter is like a roadmap or compass that allows us to all play from the same guidebook and can include everything from values, behaviours, norms, roles and responsibilities, decision making guidelines, communication best practices, etc.

How do we build a team charter?

By hosting facilitated workshops or conversations we agree to collectively build our team charter. The conversation should ideally be hosted by a neutral party who has no vested interest in the outcome of the content but who ensures that the process is inclusive, non-biased and complete.

Depending on the size of your team and time alloted for each meeting this process can take from 3-10 hours.

PART 1: PERSONAL AND TEAM VALUES

Setting the stage - both reflective, sharing and group discussion as to the values we hold on a personal and team level.

1 Sharing personal values with participants/colleagues, including a brief definition and example to understand each other at a different level.

2 Group discussion around each person's values to better understand why they hold this value and how it translates into their team and work.

3 Align on the top team values that will drive our behaviour. This includes a brief definition of each value. Specify the behaviours that accompany the values.

> One of my top two values is courage. To me, courage means sharing my opinion even when it may contradict what the majority believes. Recently, I raised concerns about the ethics of requiring employees to identify themselves on company surveys despite my colleagues being in agreement with the proposed practice.

PART 2: NORMS

1 After sharing their personal values, the team works to define the norms that are needed in order to put the values and team vision into everyday life.

2 Once the team has developed the norms that they feel they would like to have as their guiding principles then it is critical to define how we will put the norms into practice.

Example of a norm

What do you mean by this?

Why norms matter

Does everyone agree with the proposed values?
What changes need to be made to the proposed values?
Are there values which should be removed?
Are there values which are missing?

PART 3: SPECIFYING BEHAVIOURS

1 A facilitated approach to further identify the behaviours associated with the organization's values- the values the team resonates with and their specific behaviours.

This process is not a one and done but rather a well thought out identification for the team. This typically involves some pre work as well as mini group discussions to finalize the behaviours for the team.

TIP
Provide an example of how to translate a value into a list of behaviours.

2 Facilitate a discussion of the proposed behaviours.

Example of a clarifying question:

Can you give me an example of this?

3 Determine a final list of behaviours for each value.

PART 4: ACTION PLAN

Through a facilitated working session identify the actions for the team and its members to ensure that the Team Charter is understood, what it looks like and what the responsibilities are if they are not followed.

Questions to Address in the Action Plan

What objectives need to be met to put the behaviour into action?
What steps need to occur to meet these objectives?
What resources will be needed to meet these objectives?
Where/when does each objective/step apply?
Who will be responsible for overseeing each objective/step?
By what date should each objective be met?
How will you know that the behaviour is being practiced?

Possible Discussion Points

Does everyone agree with the action plan?
Is the action plan complete?
What changes need to be made to the action plan?

Insert the team charter example