

Developing a Team Charter

(All aboard for the journey to success)

 Purpose	To raise the team's awareness of how important it is to know and understand the following characteristics that make a team effective. These may include: Team Members: • Share a common identity • Have common goals and objectives • Share common leadership • Share successes and failures • Cooperate and collaborate • Have membership roles Teams: • Are comprised of diverse people • Make decisions effectively A Team Purpose: A team's purpose is defined by its team charter. A team charter defines the purpose of a team, expected outcomes and how the team will work together for results. It is a set of agreements created when a team forms to ensure everyone is on the same page from the start.
 Application	This session offers an opportunity for all team members to determine the purpose of the team and direction it takes in order for it to achieve its' goals. This can be especially useful when planning any form of culture change, when the full commitment of the team will be vital for success of the initiative.
 What happens?	Participants work together through a series of discussions and exercises to draw up a collectively determined and agreed team charter that the team will embed in the way it works, both individually and collectively, in achieving its goals
 Resources	Overall time required: Up to 3 hours. • 5 minutes for introduction and initial briefing • 45 minutes for initial discussion (TEAM PURPOSE) and feedback • 60 minutes for questionnaire, secondary discussion and feedback • 60 minutes for formation of team charter (AGREED BY ALL) Materials and resources • Flipchart Stands with Blank Pads • Marker Pens • Blue-tack • Paper, Pens or Pencils for Participants



How do I do it?

- Team Charter Worksheet (attached)

UNDERSTANDING THE TEAM PURPOSE

To help your team clearly understand its purpose, use the Team Purpose Worksheet at Worksheet 1. Ask the team to consider the questions and formulate answers in groups.

Reconvene and facilitate a discussion based on their answers

QUESTIONS TO CREATE A HIGH-PERFORMING TEAM

Before focusing on the “work,” having a proactive, upfront conversation relating to the topics listed below enables a group to gel as a team and become effective much more quickly.

Documenting responses to the questions becomes the basis for a “team charter” which specifies team goals, values, roles, responsibilities, and how the group will work together.

TOPIC SAMPLE QUESTIONS TO ADDRESS EACH TOPIC

Purpose and Key Responsibilities	What is our purpose; why do we exist? What are our key responsibilities as a team? What are others counting on us to do?
Vision	What do we want to accomplish, achieve, or create as a team? What will be the impact of our collective efforts?
Values	What are the most important values that we will adopt to guide our actions and decisions as a team (e.g. integrity)? What are the specific behaviours that describe each value? (e.g. integrity = we do what we say we will do)
Goals	What are our shared team goals and deliverables? How will we measure our success?
Roles and Responsibilities	What are our individual skills and functional areas of responsibility? How do our individual accountabilities impact each other?
Mutual Expectations	What specific behaviours do we want and expect of each other? What behaviours would negatively impact our working relationship? What is the best way to give each other feedback?
Operating Procedures: (excluding the ‘work process’ procedures e.g. SOPs, MPDs)	Team Meetings How often will we meet? For how long? When & where? How will we develop meeting agendas? Who will lead or facilitate our meetings? How will we keep track of our decisions and agreed-upon actions?

	etc)	Communication What is the best way to communicate with each other and keep each other informed? (e.g. voicemail, e-mail) How quickly do we agree to return phone calls and e-mail? How and what will we communicate to our key constituents? Decision-Making What will be our primary decision-making method? (e.g. consensus) What decisions will we make on our own? What decisions will require agreement among all team members? Conflict How will we resolve disagreements? How will we handle if we do not follow through with our agreements? Reflection How and when will we evaluate our team performance?
THE TEAM CHARTER Effective teams are driven by an inspiring Team Charter that must support the organization's vision. The charter statement is best expressed in written format stating the team's intended direction. A clearly articulated team charter provides the foundation for developing goals and action plans that will assist the team in reaching its desired outcomes. The team charter statement must contain three key elements: • What does the team do? • For whom does the team perform its functions? • How does the team go about doing its job? WRITING A TEAM CHARTER STATEMENT What does the team do? This element defines the purpose of the team. It specifies what the team does, the nature of the team's business, and why the team exists. It must be determined unanimously by all team members; otherwise the team will unravel and eventually fall apart. For whom does the team perform the function? This element defines who the primary customer is that the team serves. It identifies who will receive the benefits of the team's output. There should be interaction with the identified "customer" and discussion about how the team can meet the "customer's" needs.		

	Sample Team Charter Statement: The ABC Team We are the ABC team formed to provide quality information technology support to all customers, concentrating our resources on regional branches, and our efforts on exceeding customer expectations. TEAM CHARTER: Who? What? and How? The Team Charter statement is a combination of specific facts that are integrated with parts of the organisation's vision. It must be realistic and in line with the organisation's resources and personnel. It must be compelling and attainable. An unrealistic team charter statement that cannot be acted upon only serves to undermine morale and team leadership. Now discuss, formulate and agree YOUR TEAM CHARTER
 Note	This method can be used with great effect to open any number of different sessions. The composition of the questions may need to change of course If you encounter someone who is very poorly motivated, or of such low self-esteem that they just do not want to join in, then take special care. The lack of motivation or participation is potentially a symptom of a deeper problem.
 When?	• At the start of any project • When the focus of the team is drifting and needs to be realigned with the strategy of NHSBT • When a new manager takes over and wants to assess the team's attitude to its goals



Worksheet 1:

Team Purpose Worksheet

Complete the following statements individually and discuss.

1. The purpose for this team's existence is:

2. Our task as a team is to:

3. We will be successful as a team if we?

- Not Classified -



