Managing Remotely – Team Charter

# Why have a Team Charter

High performing teams do NOT happen by accident, they happen by design. The Team Charter gives you a framework to design your team so you can embrace the diversity of people and roles in the team, make effective decisions and have clarity and focus on delivering results that take you towards your shared team goals and purpose.

Your team charter defines the purpose of your team, expected outcomes and how your team will work together for results. It is a set of agreements created when you form the team to ensure everyone is on the same page from the start. It must support and align with the organisation’s vision and purpose, but it is for you as the team to design it.

A clearly articulated team charter provides the foundation for developing goals and action plans that will assist your team in reaching its desired outcomes. The team charter statement contains 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?

NOTE: For senior leaders who both lead their own team and are a member of a leadership team: Note that for whom your leadership team performs its functions is not for whom your own team that you lead performs its functions. E.g. if you head up a division, and are a member of a leadership team made up of division heads, your leadership team performs it’s functions for the people you report to (e.g. executive team), while your division team performs functions for that division. You may find that there are occasions when you are conflicted as you need to put the overall purpose and what is best for the leadership team overall ahead of your own division, which might mean you are not always fighting for what is best for your own division.

The first part of the team charter focuses on identifying the purpose, vision, values that will guide the team’s decision making and actions as a team and behaviours that describe and align with the values or conflict with the values. You want to clarify your overall shared goals as a team and how your own roles contribute to those goals. If you lead a team as well, you want to also look at how your team leader roles/responsibilities and accountabilities contribute and/or impact on how you can collaborate well with your peer team members in your more senior team. These individual reflections and peer conversations are vital for you to be able to achieve the top three levels in the Lencioni model of the 5 dysfunctions of a team/requirements for a high performing team: (see below and the intro to the team charter document) commitment to decisions, being accountable and responsible, and putting team priorities first.

In this part of the team charter it is also important for you to check how well the purpose, vision, values, and shared goals align with the organisation’s purpose visions and values.

Once these are clear, you can then focus on the next part of the charter which is about HOW you go about working together – your mutual expectations, and operating procedures, including when, frequency and how you have team meetings, ways of communicating, decision making, resolving conflict, measure success, and create the team environment that supports high performance, based on Patrick Lencioni’s model of the 5 levels for a high performing team:

1) Team members trust each other to have honest conversations without fear of blame

3) Openness to listening to all perspectives without fear of conflict,

3) Committing to team decisions that are the best outcome for the team as a whole even when it conflicts with your own preference,

4) Holding yourselves accountable and responsible to decisions and your team charter, and

5) Always putting the team priorities/goals ahead of your own personal or function goals and priorities.

# Team Charter Contents

To create alignment, clarity, focus, collaboration and foundation for trust.

**Background / Context** – What is our WHY for the team being set up in the first place? How we fit in and contribute to the organisation and bigger picture.

E.g. include a 3-sentence statement that contains the key information a team would need:

* Who is doing what, and for whom?
* What successful project completion looks like?
* The business justification or expected benefit of the work.

NOTE – this is for the TEAM not the organisation as a whole.

**1) Purpose** – Values, Mission and Objectives.

**1.1 Purpose and Key Responsibilities:** the reason for the team’s existence and what members hold themselves accountable for as a team. Purpose statements may be more powerful when stated from the viewpoint of the customer.

**1.2 Vision:** a results-oriented picture of the team that describes what members commit to achieve together sometime in the future.

**1.3 Values** – these are the beliefs or principles that define what is important to team members and serve to guide the team’s actions and decisions. They are not compromised for short term gain or expediency. These are most useful when they are defined in terms of specific **behaviours and actions**.

**2) Objectives and Goals:** specific, measurable results that are aligned with the team’s purpose and vision. Include Interim goals and objectives. Milestones. How you will recognise success at each one. How much is each one contributing to the overall purpose? Is everyone in alignment?

**3) Budget and Resources** – can’t succeed if not properly resourced. What resources – finance, people and other? What do we need, where do we get it from? How?

**4) Team composition and characteristics**

**Team members**

**Roles and Responsibilities** – review job roles as now, and how well aligned to individual strengths.

**Characteristics –** behaviours/attitudes and strengths

**Team Member Assessment** – including recognising **strengths**, what success looks/feels like for each member; how recognise performance for each person. How assess it?

**5) Mutual Expectations:** ground rules that clarify how team members will interact, collaborate, support each other and give each other feedback. “How we will work together. What do we expect of each other?” This helps align around purpose, focus, clarity, reduces fragmentation, conflicts, personality clashes and differing perspectives/assumptions.

**6) Operating Procedures:** descriptions of meeting structure, communication norms, decision-making methods, conflict resolution, and reflection strategies.

E.g., desired behaviours,

* Meeting structure and guidelines
* Decision-making methods and guidelines
* Conflict resolution process
* How work gets distributed among team members
* Communications inside and outside the team
* Progress updates
* Reflection strategies

**Signatures and Approvals** – inspires commitment. Ensures Clarity as have signed agreement.