

## Member's Quarterly

Spring 2016 Edition

### Ask the Expert

# The Team Charter: Keep Your Team on Track

*One size does not fit all*



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**Q:** How do I keep my team on track?

**A:** A Team Charter is a solution that I have seen work well for many leaders, HR professionals and members of the team. Team Charters are documents that clearly define the purpose of the team, how the team will work together and what the expected outcomes are. Think of a Team Charter like a “roadmap” for the team and leadership. They help communicate the purpose of the team and provide a clear direction for the team.

Team Charters are most effective when created specifically *for* the team and developed *by* the team. Cookie cutter approaches or generic charters tend to set the team up for unnecessary challenges. A customized charter that the team has developed together has a strong foundation for success because the team has created it together. The process of creating the charter is a team building exercise and when effectively facilitated, can strengthen relationships and commitment to the charter and the agreements the team has made together. It is not uncommon to have “real issues” surface during the process of developing the team charter. This is one reason that careful planning and effective facilitation is essential. For example, the team explores agreements to maintain open and respectful communication and issue resolution as part of the team charter/how the team works together. When an issue surfaces and is sidetracked or minimized, the value of the charter is quickly diminished. The process of developing team charters is clearly an opportunity to walk the talk.

Team Charters often include these elements of teamwork and how the team works together:

#### **Purpose or mission of the team:**

- This often includes the overall company mission, vision and values along with a specific statement about the mission or purpose of the team. Many teams also include a statement about the team's strengths.

#### **Goals and direction of the team:**

- This may include priorities, projects and initiatives that will be undertaken by the team.

#### **How the team will work together:**

- This might include meeting norms such as expectations about when, where and how often the team will meet. This part of the Charter might also cover what is expected of team members with regard to attendance, timeliness and preparation. In general, it will cover how meetings should be conducted.

#### **Communication norms:**

- How the team will communicate to team members (e.g., electronically, in person, etc.) and may include specific expectations about communication standards.

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- Giving and receiving feedback — the team's expectations about providing one another with positive and constructive feedback.
- How team members will address issues and challenges.

The team's approach to courageous dialogue and conflict resolution:

- Often teams will map out a clear path for addressing and resolving conflict. This often refers to company policy and procedures but is written in a way that is personal and specific to the team.

#### How the team will measure success:

- Teams often identify that they will allow 15 minutes of staff meeting agenda time every quarter to review the Charter. Some teams review the charter annually through a team building event or retreat. Other teams create a committee (includes leadership, staff and HR) to review through surveys, 1:1 discussions with staff and through annual reviews.

#### Building and sustaining the team:

- How the team will continue its efforts to build the team. This might include team activities such as annual team events, in-services, teambuilding programs, performance reviews, etc.

#### Workplace safety and respectful workplace:

- Some teams reinforce workplace safety practices and expectations in the charter and reference specific policies and procedures. Many teams specifically outline the ways in which team members and leadership will contribute to creating a respectful workplace.

#### Bringing new team members up to speed:

- Many teams appoint a small committee to meet with new employees and provide an orientation to the Charter.

We created our Team Charter. Now what? This is one of the most important questions. When a team goes through the process of collaboratively creating a Team Charter, it is important to carefully plan out:

a) Where the Charter will be housed (e.g., will each member have a copy, will staff sign the charter, will it be posted on a wall in the office?)

b) Who will initiate the Charter's implementation?

One team that I worked with created a short version of their Charter, framed it and had each staff member sign it. They also put a team photo on the Charter. This hung in a main area of their office with great pride. Their Charter inspired a number of other teams within the company to develop their own Charter.

You might think that developing the team charter looks to be quite time-consuming and challenging. Keep in mind that when your first teams build the charters and use them, they will recognize the advantages and everyone will reap the benefits immediately. It will then be easier and quicker to design charters for other work teams once you have done the first round. It's a win-win scenario for everyone involved!

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