

Creating a Team Charter

# What is a Team Charter and why creating one may be helpful

*“Building a great support system and healthy communication for your team doesn’t happen by accident.”* [*https://getlighthouse.com/blog/remote-management-questions-hybrid-team/*](https://getlighthouse.com/blog/remote-management-questions-hybrid-team/)

*“The exercise exceeded my expectations, and we have a valuable document, some relevant internal feedback and the opportunity to keep the document live.”* Feedback from the Rural Business Unit, Dept. of Land Economy, UoC

A Team Charter is a written document created by colleagues within the team to purposefully communicate and work together, particularly whist we are all finding new ways of working together. Co-creating a Team Charter is a way of establishing clarity of **purpose**, defining operational **responsibilities** within and for the team, and a way to ensure **challenges** can be approached **respectfully** and with accountability.

Considering this as a team allows everyone to have a voice, ensuring solutions can be put forward that encourage every member of the team to buy into agreed performance outcomes that can adjust and get better over time.

**Purposeful communication** like this is beneficial when a team is initially forming as it ensures the team can get out on the right footing with clarity. In a similar way, when significant change is happening or has taken place, such as responding to the challenges of the pandemic and facing ongoing transition towards hybrid working, purposeful communication is a critical success factor in supporting the process, embedding the changes and realising the benefits. It is also of great benefit to helping new members to become an integrated part of the team more quickly.

# How to create a Team Charter

This one-page [UoC Team Charter template](https://www.ppd.admin.cam.ac.uk/formstemplates/team-charter) is a high-level document with five sections to support discussion and agreement of team purpose, who is impacted, values, ways of working and how these will be reviewed and adjusted for continuous improvement. The sections are discussed and filled in by the whole team. *The real value is not only in the document itself, but is in the process of agreeing and creating it collectively.*

## 2.1 Key sections to discuss

### Section 1: Purpose

This section aims to provide clarity around why the team exists, how that aligns with the wider institutional strategy, and identify key priority outcomes that the team must achieve to be successful.

### Section 2: Our team

This section includes both team members and stakeholders and looks to use RACI to describe the participation by various roles.

* Team members – defining and discussing roles for all team members helps to provide clarity and understanding. How does each team role contribute to the team outcomes and achievements? Record the names of team members and use a separate sheet to add further clarity around each team member’s role, including title, key activities and key deliverables. Consider who is responsible (R) for each area, and who is accountable (A).
* Stake holders – identifying and being clear about who are the stakeholders for the team is really helpful to support purposeful engagement, and to consider how you can make those relationships most effective. Use a separate sheet to map out stakeholders and identify where any action could help to build engagement. Remember that other teams may be stakeholders as well as individuals. Consider who you need to consult (C) with and who you need to inform (I). See [Stakeholder map template](https://universityofcambridgecloud-my.sharepoint.com/:w:/r/personal/ead42_cam_ac_uk/Documents/PPD/Stakeholder%20map%20-%20power%20and%20interest.doc?d=wc3a087845ba64fedae336701e914785e&csf=1&web=1&e=byyd51).

### Section 3: Values

This section provides an opportunity to discuss how the team achieves its outcomes within the framework of some overarching principles. A positive and thriving environment is achieved by considering how the team achieves its outcomes, the way colleagues behave, the team’s ‘norms’ and routines. Having clear and explicit ground rules helps to avoid misunderstanding, write down the ‘unwritten rules’ and support productive relationships.

### Section 4: Ways of Working Together

The way we work is constantly evolving and has never been more acute than during and following the pandemic. As we move towards more people in the workplace again and towards increased hybrid working arrangements (where roles allow), the key areas of communication, space, technology and pattern come into sharp focus.

See [New Ways of Working from Summer 2021](https://universityofcambridgecloud.sharepoint.com/:w:/r/sites/COVIDRecovery/_layouts/15/Doc.aspx?sourcedoc=%7B459F4B33-8880-4219-9792-E0DADA106EAB%7D&file=Cambridge%20Works%20Guidance%20-%20New%20Ways%20of%20Working%20from%20Summer%202021.docx&action=default&mobileredirect=true&cid=e86ad11d-3280-4ad0-a8db-dbc13a343261) for guidance on these key areas, and to initiative/maintain conversations with individuals and the team overall. Clarity for all team members and stakeholders will support high performance and team plans will vary depending on their purpose and key roles, particularly in terms of working patterns.

### Section 5: Review

Revisiting and reviewing your Team Charter is key to maintaining engagement and support continuing improvement. Discuss and agree how often you will undertake this review and how that will happen. This exercise will continue to help to build trust and effective collaboration within the team. Identify what’s working and what could change, ie activities to Start, Stop and Continue. Build this practice in to your regular team meetings.

## 2.2 Getting it started and taking it forward

There are a multitude of ways that a team may approach this exercise, depending on the make-up of the team, the ‘role’ is fulfils and its co-dependency with other teams, etc. Some key points to consider are below.

* Whilst the whole team will be involved, it could be led by the team lead or it could be a team member, or a pair of team members – it might be the most experienced person in the team, it might be the newest member in the team – whoever it is will need some support and clear authority to do it. They will ensure that it gets completed and circulated, and remind everyone how and when it will be reviewed (which could be when someone else has a chance to take the lead).
* It could be introduced in a regular team meeting, including the ‘why and how’ – and then use parts of subsequent team meetings to consider each of the areas, or subgroups to consider different areas over time and bring them together
* It could be started as part of an ‘away-day’ or similar event to get the team together, do some review and some planning ahead
* It could be done collectively as one group, or in smaller groups, or in a series of 1:1s and then compiled in to one document.
* Teams who are part of a larger team may want to do it at ‘local’ level first and then see if a higher level team charter might come out of it for the overall team.

Remember the goal is not to ‘finish the team charter’ but is the process of agreeing healthy and productive team norms and ways of working together.

# Summary

An up-to-date Team Charter will be really helpful for new members of the team, as part of their wider induction. It is also important for established members of the team as so much working practice has changed in recent months – ways of working will not return to ‘before covid’ so everyone is new to some extent. See [It’s time to re-onboard everyone](https://hbr.org/2021/08/its-time-to-re-onboard-everyone) which includes advice to ‘Rally everyone around a three-month mission’.

# Other resources:

* [Tuckman’s four stages of team development: Forming, Storming, Norming, Performing](https://www.mindtools.com/pages/article/newLDR_86.htm) – a cyclical model, significant change to the team or the way it works will force any team back into **Re-Forming**. It must then go through the stages to reach positive-norming, and aim for high-performing
* [UoC Team Charter template](https://www.ppd.admin.cam.ac.uk/formstemplates/team-charter) – one-page Word template
* [Stakeholder map template](https://universityofcambridgecloud-my.sharepoint.com/:w:/r/personal/ead42_cam_ac_uk/Documents/PPD/Stakeholder%20map%20-%20power%20and%20interest.doc?d=wc3a087845ba64fedae336701e914785e&csf=1&web=1&e=byyd51)
* [Cambridge Works: New ways of working](https://universityofcambridgecloud.sharepoint.com/sites/UOC_Cambridge_Works) – Sharepoint site
* [New Ways of Working from Summer 2021](https://universityofcambridgecloud.sharepoint.com/:w:/r/sites/COVIDRecovery/_layouts/15/Doc.aspx?sourcedoc=%7B459F4B33-8880-4219-9792-E0DADA106EAB%7D&file=Cambridge%20Works%20Guidance%20-%20New%20Ways%20of%20Working%20from%20Summer%202021.docx&action=default&mobileredirect=true&cid=e86ad11d-3280-4ad0-a8db-dbc13a343261) – guidance document
* [PPD live and online learning](https://www.training.cam.ac.uk/cppd/search) for all employees
* [Ourcambridge live and online learning](https://www.training.cam.ac.uk/ourcambridge/search?instructorLed=on&selfTaught=on&course_type_facet_shown=&scheduled=on&course_date_facet_shown=true&course_availability_facet_shown=&theme_facet_shown=&scrollPos=0) including Lean methodology
* [Professional Services Values](https://www.ourcambridge.admin.cam.ac.uk/values)

Jessie Monck, [Personal and Professional Development](https://www.ppd.admin.cam.ac.uk/), [jcm56@cam.ac.uk](mailto:jcm56@cam.ac.uk)

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