Collaborative Team Charter

What is a Team Charter?

This document contains suggestions for effective group collaboration. A good practice for such groups is to create a group-generated agreement that outlines how the group will work in terms of group structure and norms, communication, knowledge management, and establishing goals and objectives. This document lays out various topics for discussion (organized by section headings), intended to be used as a springboard for group discussion on these topics.

Who should use a Team Charter? a

If you are part of a group of three-to-eight people aiming to work collaboratively on a long-term project (in excess of 3 weeks), be it an assignment, a proposal, or a work project, this headings document is for you. If your group is outside of that size range, you are working together for three weeks or less, or you've worked extensively with this group before, this may not be as useful for you (but feel free to take advantage of what it may offer).

When should a Team Charter be made?

Developing a team charter should be one of the first things you do when you meet with your group, along with exchanging contact information. The amount of time needed to construct this team charter varies, so we suggest putting aside at least an hour to meet and begin to create the document and fill out the sections. The amount of time you will need will depend on the size of your group, the length of your project, and how diverse your group is. Keep in mind, as collaboration develops throughout the course of the project, you may want to invest some time revising the document to more accurately reflect what the collaboration looks like or to re-evaluate some decisions that could be negatively influencing the group's collaboration.

How is this document to be used?

Once the group members have been established and the group is able to schedule a meeting at least one hour long, the headings document should be presented as a starting point. Begin by reading through the two-page headings document and discussing each of the items, ensuring that everyone in the group gets to weigh in. If any areas need clarification or expansion, they can be highlighted and further explored by looking in the *Appendix*. The *Appendix* contains further details and examples, and it gives access to supporting research. All decisions made during the meeting(s) should be recorded and made accessible to the whole group.

Group Expectations and Norms

Accountability

What will group members be responsible for? Have a conversation and decide what should happen if a group member cannot finish a deliverable on time. How will you decide who should be responsible for its completion?

Group Roles

Assigning group roles can be a useful way to monitor and enhance group dynamics. Look at the roles listed in the *Appendix* for some suggestions of some good general roles. The decisions of which roles to have, who will have them, for how long, and how they will be managed will be up to the group after discussing what kinds of roles are needed.

Goals

Group expectations should be discussed in the context of each group member's personal goals and assumptions about the group. Everyone should ask themselves questions such as: why are they part of the project? What do they hope to get out of the project? Is everyone here to accomplish the same thing? Focus on personal expectations and assumptions and ensure everyone has a chance to contribute here. The group goals are important as well (so much so that they should be discussed in their own section below).

Etiquette & House Rules

Group etiquette is the code of behaviour for how the group members function in relation to each other. One way to go about establishing group etiquette is the use of "House Rules". These are rules that are created in relation to how the group functions, and are usually unique to your group (although, if a particular rule worked for a previous collaboration, you should suggest it to your group). They can include additions or alterations to the typical format of meetings, dress code, expectations around the attitude of individuals in the group in meetings, how to respond to others' ideas, or anything else you feel is necessary to aid productive collaboration.

Weaknesses & Opportunities

It is a good idea to be honest about weaknesses, so that no group members are set up for frustration or disappointment. However, weaknesses can also reflect opportunities where a group member that lacks a particular strength/skill might be able to learn from another group member that has it. Consider how long the group is willing to devote to the learning aspect of collaboration before focusing on these opportunities.

Communication

Decision Making

A system should be devised that allows for all parties to be heard. Ideally, decision making should be thorough yet expedient. While deliberating on a big decision is useful, having a process that takes too long for minor decisions can waste time. See the *Appendix* for some examples.

Conflict

A system for confronting conflict and resolving it needs to be included in order to ensure that group members feel safe when expressing opinions that may oppose those expressed by others. The system is also in place to make sure that any conflict that does occur is made obvious to the person who may be causing the harm without knowing it and damaging group morale.

Knowledge Management

Memory of Group Process

It is important to keep records of all decisions and the process used to make decisions. It is strongly recommended that "minutes" of every meeting are taken and stored, somewhere where all group members have access to them.

Process Assessment

You should set aside time during a meeting to assess your group processes: how effective have the decisions been? Is it too late to change any decisions that have already been made that were problematic? You should also consider whether any changes should be made to the team charter, if necessary.

Group Management

Decide with your group when to have meetings. Should they be assigned on a regular date, or decided on an on-going basis? Decide how decisions may be added to a meeting agenda and what decisions are appropriate for meeting times.

Goals and Objectives for Group Tasks

This section is meant to help you determine as a group what the goals of the project are and to ensure they are understood by all the group members. You should also try to clarify what the

deliverables are for the project. You may also want to include expected completion dates so you can plan ahead. Ensure everyone is aware of who is responsible for the various outcome(s) and deliverable(s) of the collaboration.