

Team Charters Train the Trainer

Workbook

This workbook belongs to

Team Charter Facilitation Guide

Based on two half days (9-1), covering:

- Team Purpose
- Team Responsibilities
- Ground Rules
- Meetings

Materials:

- Team charter posters (5)
- Whiteboard & pens
- 2 x flip charts, pads, pens
- Lots of post-it notes
- Colour dots for voting

Key:

Black text is for what you as facilitator say to the participants

Blue text is for facilitator instructions

Green text refers to a set-up, poster or flipchart

SESSION ONE

9.00 **Facilitator** **Icebreaker: Musical Chairs**

- Participants form a circle of chairs, facing in
- One chair is removed and one person stands in the middle
- The idea is not to be left in the middle
- The person in the middle makes a statement that is TRUE FOR THEM
- Everyone else whom that statement is true for must get up and attempt to get to another seat. You cannot go for the seat next to you.

Keep playing for 5-10 minutes.

9.15 **Team Leader/Manager** **Give context for the Team Charter**

9.25 **Facilitator** **Introduce TEAM CHARTERS**

What do you currently understand by the concept of a team charter?

Team charters are about creating clarity and unity within a team (refer to the poster).

The benefits of a team charter are:

- Ensuring all team members are unified toward a purpose that motivates them, whilst also meeting organisational needs.
- Clarifying for all team members what the key responsibilities are for the team – and what they are not.
- Allowing the team to determine their own standards and agreed behaviours, which encourages team members to self-manage and hold each other to account.
- Adding significant value to meeting times by allowing the team to decide how, when and why the team comes together.
- Allowing the team to create a clear message about who they are and what they do, that can be used to educate the wider organisation.

There are many sections that teams can include in their team charter, depending on what their focus areas are. Over the next two sessions, we are going to look at four sections that we believe add the most benefit: (talk to list on the poster)

Purpose

Team Responsibilities

Meetings

Ground Rules

9.40 Facilitator Introduce PURPOSE STATEMENTS

Talk through the "Purpose" poster.

Has anyone ever heard the Team NZ phrase "does it make the boat go faster?"

This touchstone helped NZ win the first America's Cup. Every decision was made based on the answer to this question. A well-considered and written purpose statement can do the same for you.

- Head up the whiteboard with "WHAT IS [TEAM NAME] HERE FOR?"
- Everyone brainstorm onto the board (using post-it notes) all the possible answers to this question. (allow about 10 minutes)

RULES OF BRAINSTORMING –

- Stand up (will help with energy)
- No right or wrong ideas, this is about VOLUME
- No speaking – except to read out your idea as you place it
- Don't save up your ideas, stick each one up as soon as you write it
- Don't worry about double-ups
- After the brainstorm, have the team get rid of any double-ups. Cluster together any post-its that articulate the same concept. (this is called an Affinity Diagram).
- Challenge the team to name each cluster.
- Now have the team vote – based on the most important reasons that this team exists.

RULES OF MULTIVOTING –

TECHNIQUE A (Most useful when there is a large volume of ideas):

- Everyone is assigned a number of votes (usually between 3-6)
- Explain that people can use their votes any way they wish – one vote per cluster or idea, or all their votes in one place, it's up to them

TECHNIQUE B (most useful when you have fewer ideas to vote on, and you are trying to introduce spread in the voting to come to a definitive answer.

- Everyone votes on EVERY idea
- Each person assigns each idea either a 0, 1, 3 or 7
 - 0 = Don't see any value in the idea
 - 1 = See a little value in the idea
 - 3 = Really like/support this idea
 - 7 = This idea has my FULL SUPPORT

- Let's look at what we've now got in front of us. Are there 2-3 clusters that clearly are the favourites? If not, exclude the least popular clusters, reduce the votes available to each team member, and have them vote again, until you have 2-3 clear winners.
- Explain that the next step is to take these top concepts and create an actual purpose statement.

10.30(ish)

Morning Tea, 15min

Split the team in two and send to two flip charts.

Have each team come up with some wording for a possible purpose statement.

Each team writes their statement on the board or displays on the flipchart

Now the whole team starts word-smithing to come up with one purpose statement.

Once the draft is reached, refer back to the check items.

Closing comments and next steps from the facilitator and team leader/manager.

SESSION TWO

9.00 Facilitator Icebreaker: A Truth and A Lie

As all good workshops should begin, we're going to start off with some lies and deception and find out how well you can read each other!

- o Ask everyone to think of two facts that their teammates don't know about them. One is to be true, and one will be a lie (give them a few minutes to think).
- o Use yourself as an example first.
- o State both facts and ask people to decide which they think is true and which is the lie
- o Ask people to stand on one side of the room if they think the first fact is true, and on the other side if they think the other fact is true.
- o Reveal the truth and the lie.
- o Now go around the group until all members have had a go at telling their truth and lie.

9.15 Facilitator Welcome back to the room.

In this session we will:

- a) Revisit (and hopefully lock-in) the purpose
- b) Look at team responsibilities
- c) Discuss meetings
- d) Look at setting some Ground Rules

9.20 Facilitator Re-visit PURPOSE

Have the purpose from the last session displayed.

Ask the team to comment – how are people feeling about the purpose? Does it need any further tweaks? Can we "lock it in"?

9.35 Facilitator Introduce TEAM RESPONSIBILITIES (talk through poster)

Again, we're going to start with a brainstorm.

Head up the board: "WE ARE RESPONSIBLE/ACCOUNTABLE FOR..."

Get everyone to brainstorm onto the board, using post-it notes.

Remember – no right or wrong, this is about volume. Don't discuss but read out your post-it as you put it up.

After the brainstorm, have the team get rid of any double-ups and sort into clusters – aiming for 4-6 max. Again, name each cluster.

Is there anything up there that anyone disagrees with / does not believe we are responsible for?

If there are too many clusters, use MULTIVOTING TECHNIQUE A or B to reduce the number.

Next task is to try to develop a team responsibility statement for each of these clusters.

Break the group into smaller teams and assign clusters to work on.

10:30ish Morning Tea

Have the each team share their statement and work through with the full team to reach consensus.

Compare against check questions.

11.15 Facilitator Introduce MEETINGS (talk through poster)

Have team discuss and agree with each point on the poster. Record on the flipchart.

12.00 Facilitator Introduce GROUND RULES (talk through poster)

Again, we'll begin with a brainstorm.

Remove double-ups and cluster (affinity diagram)

Have team create a ground-rule statement that captures each cluster (some may be clusters of one)

How does the team feel about each ground rule? Discuss each and tweak/add/remove as needed.

How do these ground rules sit against our check questions?

Is everyone happy to "sign up" to these ground rules?

11.50 Facilitator Wrap-up

Things left for you to do:

- 1) Decide who will take responsibility for writing up your charter
- 2) Have all team members sign up to ground rules
- 3) Decide where you will display your charter and how you will use it to help communicate who you are and what you do across your organisation
- 4) Decide how you will keep your charter alive and relevant – e.g. revisit every 6mths.

11.55 Team leader/Manager Final Remarks

Team Charter Examples

Executive Team Purpose:

Providing strategic leadership & future direction to create a stable vehicle for ----- to deliver unrivalled customer experience.

Team Responsibilities:**LEADERSHIP**

We are responsible for robust and consistent leadership capability within -----

STRATEGY

We are responsible for designing and executing a pioneering strategy to make a positive impact on the world

CULTURE

We are responsible for building and investing in the culture and values of -----

CUSTOMERS & SALES

We are responsible for growing sustainable & strategic relationships

OPERATIONS

We are responsible for facilitating the continuous improvement and agile management of operations

FINANCIALS

We are responsible for ensuring the ongoing financial viability & profitability of -----

Paving Team Purpose

Paving our way to a connected community through safely providing quality asphalt, built with pride, on a foundation of market-leading teamwork.

Forestry Board Purpose:

The ----- Board will drive a world-class forest and optimise business and innovation in a way that creates opportunities for our owners.

Team Responsibilities:

- Effective Governance and setting a clear direction for the Trust
- Setting and achieving financial and non-financial goals and managing risk in an effective and responsible way
- Introduction and implementation of innovation, research and development opportunities
- Retention and management of a sustainable, healthy environment
- Transparent and responsible communication to all stakeholders
- The provision of pathways and opportunities for our people and community

Ground Rules:

It's about how we treat each other:

- We support and encourage each other, and have each other's backs
- We act with honesty and integrity at all times
- We share the load
- We leverage off each other's strengths
- We stay above the line and own our mistakes
- We complement good ideas and keep feedback constructive
- We do what we say we'll do – or communicate early if we can't
- We're all about the TEAM

It's about how we behave when we get together

- We show up – on time, prepared and focussed
- We respect Chatham House Rules and observe the protocols
- We show courage to speak our minds
- We're up-front and forthright with our opinions and ideas
- We participate fully
- We keep our focus on the strategic view
- We're positive, decisive and solution focussed

On this Board we're about:

- Thinking outside the square
- Challenging and being challenged – without defensiveness
- Getting outside our comfort zones
- Driving toward the future
- Engaging openly and constructively
-

HR Team Purpose:

Maximize competitive advantage through the development of high performing people and leaders committed to driving a culture of excellence.

This team is responsible for:

- Educating, coaching and inspiring our people to continually grow, develop and embrace change, driving our culture of excellence
- Providing world-class Human Resources transactional processes to support the organisation to excel.
- Providing tools and techniques that support and empower leaders to drive excellent performance and accountability.
- Partnering with the business areas to develop aligned strategies with fit for purpose infrastructures that enable effective strategy deployment.
- Providing relevant advice and coaching that achieves legal compliance, minimises risk and drives excellence in people related practice and process.
- Through strong employer branding, we attract great talent and through providing a great place to work we will empower our people and allow them to realise their full potential.

Our Ground Rules are:

Respect. Always respect.

- We respect each other's time
- We respect the views and perspectives of our teammates
- We act with honesty and integrity at all times
- We praise publicly (and often) and critique privately (and with respect)
- We communicate face to face whenever we can

We embrace feedback

- We really listen to each other
- We seek out feedback and look for opportunities to give it
- We share and are transparent with what we know and what we do
- We leave defensiveness at the door

We'll be focused on:

- Solutions
- Challenging the status quo
- Continuous improvement
- A commitment to learning
- Strategy and the bigger picture

We're committed to this team!

- We're passionate about our purpose
- We look after each other and "have each other's backs"
- We do what we say we'll do – or communicate early if we can't
- We keep each other up to speed and inform each other of delays
- We have fun