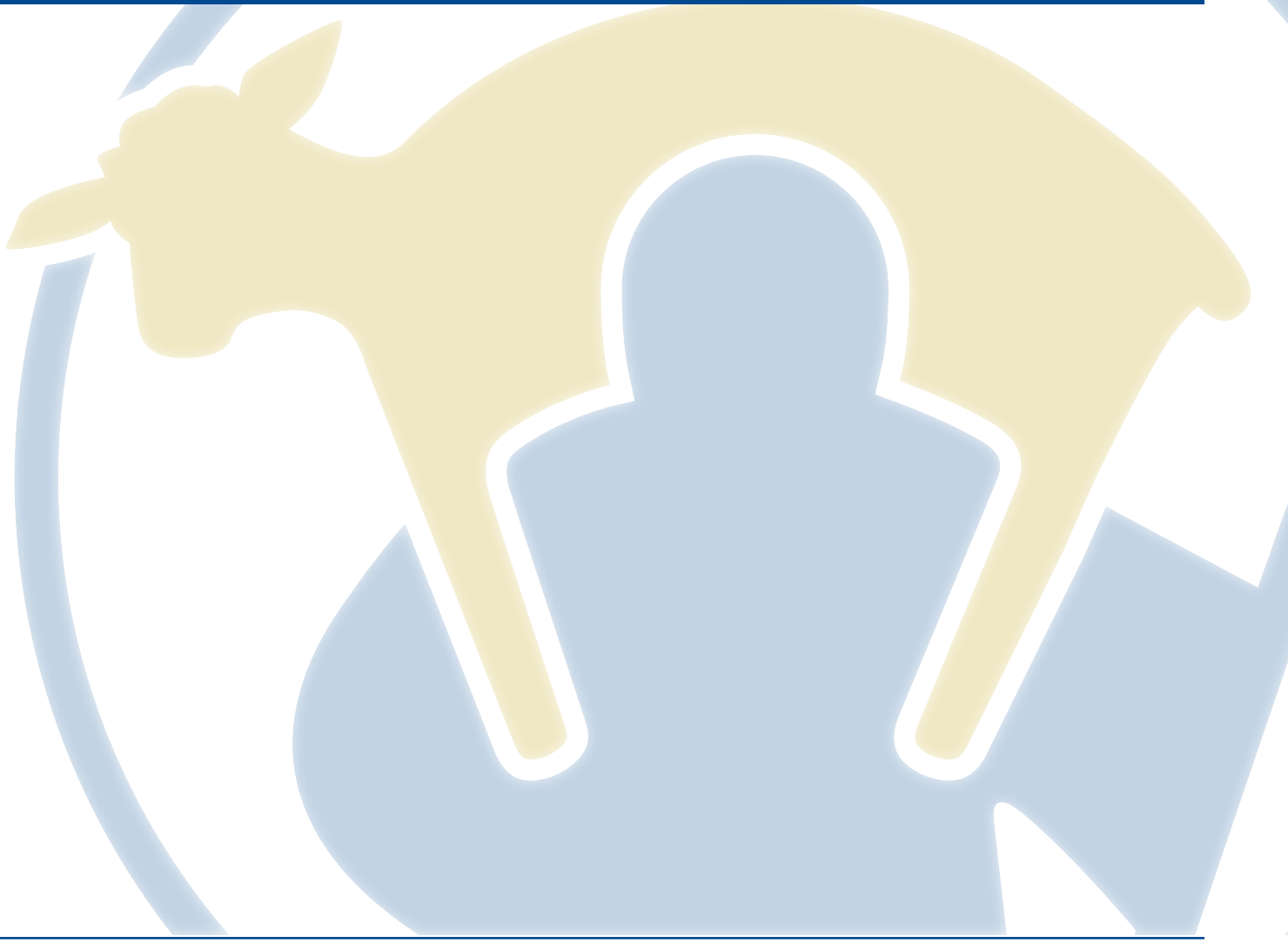
Catholic Leadership
INSTITUTE

TEAM CHARTER PACKET



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Components of the Team Charter

There are six components to the team charter document. The first five components belong to the team members. The sixth component brings the Sponsor and the Team together to sign off on a mutually agreed upon document.

Part 1: Team Vision

- Visualize the Ideal
- Craft a Team Purpose Statement
- Identify Team Values
- Align Vision

Part 2: Anticipated Team Outcomes

Part 3: Team Operating Guidelines

Part 4: Team Norms and Ground Rules

Part 5: Team Roles and Responsibilities

Part 6: Charter Endorsement

The Charter Document precedes the team's work on specific outcomes. It is the single most important element in setting up a sponsored team for success. It takes into account the critical duality that a team must pay attention to: both output and process. It debugs teams!

"Mutuality does not mean equality, but it does mean the absence of domination and 'power over' in the relationship[s]. Respect for and acceptance of the other is the bedrock of mutuality. In this paradigm freedom is the heart of what it means to be human. We are free to love and to choose freely that which is good for ourselves but also for others."

—Leadership in Religious Communities: Witnessing to the Power of the Resurrection Human Development; Volume 27, Number 4, Winter 2006, Helen Cahill, O.P.

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Part 1: Team Vision

Visualize the Ideal

Project yourself into the future. Assume you are reflecting back on work the Team has performed. If the team was functioning ideally, what would it look like? As the visualization questions are read aloud, simply think about what your answers might be. Let your imagination run wild.

Guiding Questions

1. What does the team produce or accomplish? How does it serve others?
2. How do we share our faith and help each other grow spiritually?
3. How do we use our time?
4. How do team members interact with each other?
5. How do team members feel when a meeting or event is upcoming?
6. How do we deal with disagreement and conflict?
7. How are decisions made?
8. How is leadership provided?
9. What is the atmosphere or climate of the team?
10. What values are being demonstrated in the way we work together and in the services we provide or products we produce?
11. How do we support, encourage, and recognize each other?
12. What do others say about our team?
13. How do we celebrate success?
14. If this team knew it could do anything and not fail, what would it dare to do?

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Continued, Team Vision

Self-Reflection

Capture your thoughts, feelings, and ideas about the ideal in the spaces below.

Team Reflection

Share your responses with those of your team members. Capture the common denominators in the spaces below.

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Craft a Team Purpose Statement

Now that the team has visualized the ideal team, imagined the best-case scenario without limitations, and recognized the team's potential, it is more likely to create a purpose with passion.

Identify Assumptions and Boundaries
Identify the assumptions that team members have about the team—especially regarding the purpose, responsibilities, authority, and boundaries of the team. Assign one member to record responses to the following questions regarding purpose, responsibilities, authority, and boundaries of the team.

Guiding Questions

1. Why does the team exist? Why was it formed?
2. How will our organization (the Parish or Diocese) benefit as a result of our team's success?
3. What is the sponsor's vision for the team?
4. Is there a difference between what the sponsor hopes for the team and what team members envision?
5. What is the team's understanding of its resources?
6. What is the time commitment that team members perceive needs to be made for the team to accomplish its purpose?
7. What assumptions does the team have regarding its authority and boundaries?
8. What do team members see as the team's primary responsibilities?
9. Do assumptions, prejudices, and/or issues from the past exist among the team's constituents (the people and parish that the team serves) that the team needs to address?

Notes

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Continued, Team Vision

Agree on Assumptions and Boundaries
Highlight the assumptions brainstormed that the team agrees are true or relevant and record in the space provided below.

Discuss Areas of Disagreement
Attempt to resolve areas of disagreement or confusion. Capture unresolved areas of disagreement below to discuss with the Sponsor.

Monitor these conflicting assumptions as you continue the chartering process to be sure they are not undermining your progress. It is better to acknowledge areas of confusion, contention, and consideration now rather than have them deal the team a fatal blow at some critical juncture.

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Craft the Team Purpose Statement—Team Version

Now that the team has visualized the ideal team, imagined the best-case scenario without limitations, and recognized the team's potential, it is more likely to create a purpose with passion. Create the Team's Purpose Statement using insights gained from the team visualization and agreed upon assumptions and boundaries. Before making use of the team's collective wisdom, try your hand at crafting the team's Purpose Statement from your own point of view.

Individual Version
Follow the four-step process outlined below to write an individual version of the team's Purpose Statement in one sentence (or short paragraph).

1. List common characteristics present on the team that you feel good about. These will be nouns.

Examples: We have ...

Expertise in ...	Compassion for ...	Knowledge of ...
Sense of humor	Faith in ...	Understanding of ...
Interpersonal skills	Love of ...	Caring for ...
Energy	Sales ability	Creativity
Enthusiasm	Diversity	A calling to ...
_____	_____	_____
_____	_____	_____
_____	_____	_____

"The one who involves themselves in creating a new way of being, those who craft and create a new model, are the ones will eventually own it and claim it as theirs. If there is no involvement, there is no ownership. Thus, everyone needs a place at the table, and there must be a means for finding their seat."

—Circular Models of Leadership: Birthing a New Way of Being. Ted Dunn, Ph.D. in Human Development, Winter 2006

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Continued, Team Vision

2. Create a list of ways the team effectively interacts with people, especially those it serves.

Examples: We...

Teach	Convince	Inspire	Nurture
Produce	Study	Care	Plan
Encourage	Lead	Write	Act
Stimulate	Love	Manage	Sell
Speak	Help	Motivate	Build
_____	_____	_____	Organize
_____	_____	_____	_____
_____	_____	_____	_____

3. Write a description of a perfect world for your team—from your perspective. The "world" can be defined as the universe, the planet Earth, or the parish community your team serves.

Example: *My perfect world is a place where every parishioner understands and lives the Catholic faith as a result of a dynamic, stimulating, and effective religious education program.*

My perfect world...

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4. Combine two nouns, two verbs, and your definition of the perfect world.

Example: *The Religious Education Leadership Team's purpose is to use our knowledge of the teachings of the Magisterium and understanding of students' needs to create and oversee the delivery of a dynamic, stimulating, and effective religious education program so that all parishioners of St. Monica's understand and live the Catholic faith.*

Our team purpose is to use our

(noun) and (noun)

to (verb) and (verb)

(with whom or what) to/so that/in order that

(my perfect world...)

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Continued, Team Vision

Craft the Team Purpose Statement—Team Version

Use the team's collective wisdom to craft the team's Purpose Statement.

Follow the four-step process outlined below to craft the team's Purpose Statement in one sentence (or short paragraph). Coalesce team members' individual responses and ideas to create a Purpose Statement that draws from the team's diversity, but reflects its shared sense of purpose.

1. List common characteristics present on the team that you feel good about. These will be nouns.

Examples: We have ...

Expertise in...	Compassion for...	Knowledge of...
Sense of humor	Faith in...	Understanding of...
Interpersonal skills	Love of...	Caring for...
Energy	Sales ability	Creativity
Enthusiasm	Diversity	A calling to...
_____	_____	_____
_____	_____	_____
_____	_____	_____

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2. Create a list of ways the team effectively interacts with people, especially those it serves.

Examples: We...

Teach	Convince	Inspire	Nurture
Produce	Study	Care	Plan
Encourage	Lead	Write	Act
Stimulate	Love	Manage	Sell
Speak	Help	Motivate	Build
_____	_____	_____	Organize
_____	_____	_____	_____
_____	_____	_____	_____

3. Write a description of a perfect world—from your perspective. The "world" can be defined as the universe, the planet Earth, or the community your team serves.

Example: *Our perfect world is a place where every parishioner understands and lives the Catholic faith as a result of a dynamic, stimulating, and effective religious education program.*

Our perfect world...

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Continued, Team Vision

Craft the Team Purpose Statement —Team Version

4. Combine two nouns, two verbs, and your definition of the perfect world.

Example: *The Religious Education Leadership Team's purpose is to use our knowledge of the Magisterium and understanding of students' needs to create and oversee the delivery of a dynamic, stimulating, and effective religious education program so that all parishioners of St. Monica's understand and live the Catholic faith.*

Our Team Purpose Statement

Our team purpose is to use our

(noun) and (noun)

to (verb) and (verb)

(with whom or what) to/so that/in order that

(our perfect world...)

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Identify Team Values

Identify heartfelt values that will guide the Team's future decisions and actions. In considering your team values, remember the duality of teams, specifically the need to balance output and process. The team's values should answer the questions *What does the team stand for?* and *What standards are important to the team, to the way it works, and to its outcomes or services?*

Values Examples
From the values below, circle those that especially apply to this team. Write in any other values you believe should guide the team.

sacrifice honesty courage joy peace truth
ambitious logic helpful freedom cleanliness
efficient thriftiness self-control
friendliness reverence fortitude authenticity kindness
beauty
courteous
forgiveness obedience patience
generosity
loyalty
compassion
love prudence
trustworthiness
cheerful
faith security

Additional Values:

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Continued, Team Vision

Identify Team Values—Individual
Identify the 2-3 values you would like your team to adopt.

1. _____

2. _____

3. _____

Identify Team Values
As a team, agree on 2-3 values that the entire team can embrace. Be sure to communicate the meaning and description of the values presented.

1. _____

2. _____

3. _____

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Proclaim Values

In the following chart, identify and state each of the 2-3 values important to your team. Define what each means for you. Then, list the specific and concrete behaviors that operationalize the value.

	Value 1	Value 2	Value 3
Identified Value			
Definition			
2-3 Behaviors to Operationalize the Value			

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Continued, Team Vision

Image Statement

Now that your team has agreed on its purpose and values, synthesize the essence of the team in elegant simplicity through an image statement that is motivating to both team members and its constituents.

An Image Statement captures the answers to the following questions:

What does your team do?
What does your team stand for? and
What does your team hope to accomplish?

With your teammates, write an easy-to-recall statement—hopefully just one sentence—that captures the message you want to send to the team's constituents and the general public about what your team stands for and hopes to accomplish.

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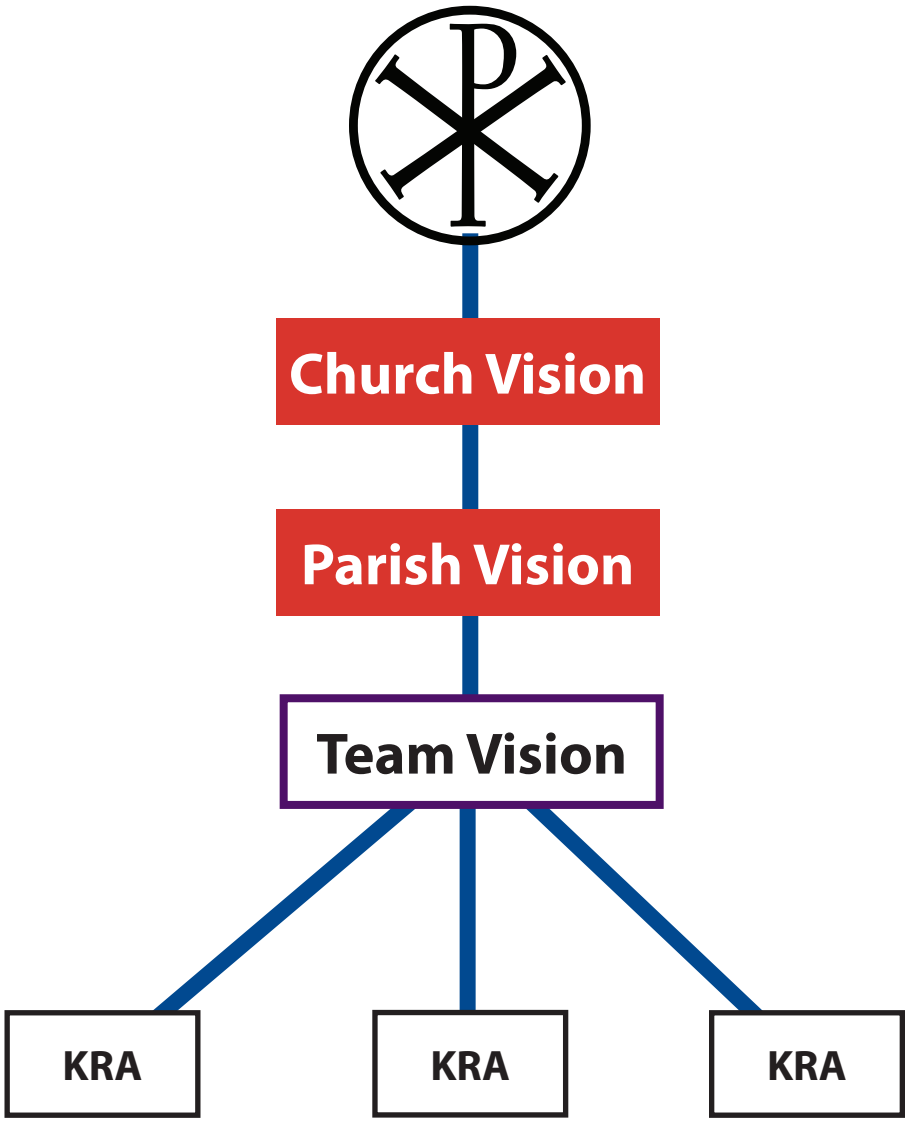
Team Vision: Align Vision

Leadership Model of Alignment



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Part 2: Anticipated Team Outcomes

Set SMART Goals

Goal Statements describe the desired results the team is expected to accomplish within a specific time period. Goals should set standards for quality, quantity, timelines, cost, or percent of change desired.

Set 1-3 goals. Validate the goal statements using the SMART questions from your job aid—reworking the goal statements to make them SMARTer, if necessary.

Achieve *Non-fuzzy action verb*	
Outcome *Specific end result*	
When? *Specific end date*	

Achieve *Non-fuzzy action verb*	
Outcome *Specific end result*	
When? *Specific end date*	

Achieve *Non-fuzzy action verb*	
Outcome *Specific end result*	
When? *Specific end date*	

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Part 3: Team Operating Guidelines

The most critical guidelines are those for meeting structure, problem solving, decision making, conflict resolution, and emerging leadership.

Consider the following questions to prompt awareness of the guidelines that will empower your team to work efficiently and effectively over time. Based on your answers from the team guideline prompts, establish critical operating guidelines. Jot them in the spaces below.

Meeting Structure

- *How should meetings be run?*
- *Should agendas and minutes be used?*
- *How often should meetings be called?*
- *Should there be a facilitator, scribe, process observer, or timekeeper?*

We will...

Problem-Solving Process

- *What is the team's policy on voicing problems, issues, complaints, and concerns? How shall the team solve project/program problems and issues?*
- *Will the team follow or use a particular problem-solving model?*
- *What is the team's tolerance for exploring solutions and generating alternatives?*
- *Does the team know the rules of brainstorming?*
- *What tools or techniques will be required?*

We will...

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Continued, Team Operating Guidelines

Decision-Making Policies

- *How will the team make decisions?*
- *Will different decisions require different decision-making processes?*
- *Does a quorum need to be present for certain decisions? Which ones?*
- *What resources will the team have for making decisions?*
- *Are decisions considered final once made? Under what circumstances is it appropriate to change decisions?*
- *Does the team have a plan for involving all team members to contribute to the decision-making process and for encouraging and valuing participation?*

We will...

Conflict Resolution Rules

- *How does a team member voice a conflict or perceived breech of values?*
- *What strategies does the team employ to resolve conflict?*
- *Does the team have a systematic approach to resolving conflict?*
- *What is the responsibility of the parties who are in conflict?*
- *What is the responsibility of other team members when conflict arises?*
- *What is the team's value regarding conflict and raising issues?*

We will...

Other Rules for the Team to Consider

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Part 4: Team Norms and Ground Rules

Chart DISC Team Profile

A DISC Team Profile will be created on a flip chart. We will discuss and record the implications of the primary DISCpositions present on the team.

Member Name	DISCposition	
	Primary	Secondary
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____
8. _____	_____	_____
9. _____	_____	_____
10. _____	_____	_____

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Continued, Team Norms and Ground Rules

Team Norms and Ground Rules

Team Norms are guiding principles or rules that govern interpersonal conduct among members. They describe how people should treat each other. If things become unruly, uncomfortable, or dysfunctional, the Team Norms need to be evoked.

As a team, consider and record the most important ground rules that will establish norms that result in better communication, feedback, participation, leadership, and atmosphere for fulfilling the team's purpose. Refer to your job aid for helpful tips and examples.

Our Ground Rules for Communication

Our Ground Rules for Giving & Receiving Feedback

Our Ground Rules for Commitment, Involvement, & Engagement

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Our Ground Rules for Leadership

Our Ground Rules for Setting Tone

Our Ground Rules for Celebration

Other Ground Rules

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Part 5: Team Roles and Responsibilities

Team responsibilities are a set of roles that the whole team or individual members will be accountable for during the team's operation. Roles and responsibilities may be collective, paired, or individual. This distinction is important to ensure balance between a team approach and individual accountability. This worksheet gives you an opportunity to clarify existing roles and evaluate assignments or re-assignments that need to be made.

Identify Team Roles and Responsibilities

Based on the operating guidelines and team norms, identify which roles and responsibilities are collective, which are paired, and which are individual. Refer to your job aid for helpful tips and examples.

Collective Responsibilities
(Clear statements of responsibilities to be shared by every team member)

Paired Responsibilities
(Clear statements of responsibilities to be shared by two team members, one acting as a support to the other)

Individual Responsibilities
(Clear statements of responsibilities for which an individual will be held accountable)

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Assign Team Roles and Responsibilities

After responsibilities have been outlined, assign specific people to the paired and individual roles—especially for the process roles listed below.

Team Leader: _____

Meeting Facilitator: _____

Process Observer: _____

Scribe/Recorder: _____

Timekeeper: _____

"We are created by God different, not so that we should be alienated by our differences, but so we should know our need of one another. We are created for interdependence. The only way you can be human is together. I have gifts that you don't have and you have gifts I don't have—and God says 'Voila!'"

—Archbishop Desmond Tutu. 1999

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Part 6: Charter Endorsement

Step One	Step Two	Step Three	Step Four
Team's Final Review	Sponsor's Endorsement	Team's Validation	Communicate to Parish Community
Ensuring all steps are fully completed	Requesting any clarification or minor changes (*) By signing the charter the sponsor agrees to support the team with resources and advocate for the team throughout it's life	Signing the charter the team validates the sponsorship	Communicating the charter with the groups and persons with whom they work, the team can increase its credibility and probability of success

(*) Major disagreements with the sponsor's outcomes, boundaries or resources

"My prayer is that your love may more and more abound, both in understanding and wealth of experience, so that with a clear conscience and blameless conduct you may learn to value the things that really matter, up to the very day of Christ. It is my wish that you may be found rich in the harvest of justice which Jesus Christ ripened in you, to the glory and praise of God."

—Philippians 1: 9-11

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Team Final Review

Address these questions to help you and your teammates assess the level of commitment or potential problems each individual has with the charter. Each team member must agree to commit his or her best efforts to the team outcomes. Team members, having had their chance to influence the charter, must now fully agree to support the charter or be prepared to step out of the team.

Discuss the following questions to help you and your teammates assess the level of commitment or potential problems each individual has with the charter.

1. Do you think the charter represents the group's best thinking? If no, why not?
2. Will the charter require you to behave in ways that are against your personal values? If yes, how? Is this a serious issue that will affect your contribution to the team? Do you see any way to solve the issue?
3. Is it important for you to object to the charter? Why?
4. If you have reservations, are they based on sound fact? Do you believe the team has fully heard your reservations? Do you feel you have had an opportunity to influence the team? (If the answer is no, help the team member's ideas be heard and understood, if not accepted.)
5. If you have reservations, are they strong enough that you may choose not to give your best effort?

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Continued, Charter Endorsement

Sponsor Endorsement

The sponsor's endorsement means approval is given for the content of the charter and the commitment to support it with resources as required.

Answer the following questions to help the team and the sponsor and/or management verify the endorsement.

1. Is there any part of the charter that needs to be elaborated on for further understanding?
2. Are the outcomes and deliverables seen as beneficial to the organization?
3. Are any processes or outcomes against organizational values?
4. How will the team, sponsor, and/or management team communicate frequently enough to meet the needs of all concerned?
5. What behaviors does the team want from the sponsor and/or management as an indicator of support?

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Communicate the Charter to the Parish Community

The charter should be communicated to those with whom the team will work most. By sharing the charter with primary contacts, the team can increase its credibility and probability of success with these external groups. The endorsement process should be completed by announcing the team's vision and outcomes to the parish community.

Answer the following questions to determine how the team might share the charter with the parish community.

1. What information would be of interest to the groups with whom the team will have the most contact? To the parish at large?
2. What is the most appropriate means of communicating the charter to the parish at large? Email? Internet? Parish newsletter? Bulletin board posting? Memo?
3. How can the team produce periodic updates on a routine basis that can be done easily and efficiently?
4. What information should not be shared at this time?
5. What "image" does the team want to present to the parish community?

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Charter Document Template

Team Name:	
1. Team Vision: One easy-to-recall sentence to capture the hopes and dreams for your team and the community it serves.	
Purpose Statement: 2 nouns, 2 verbs, and statement of perfect world. Connect to goals and your parish/diocesan mission and plans.	
Values: Rank order and define the values by which your team will operate.	
2. Team Outcomes Define the key responsibility areas (KRAs) and SMART goals for the team. What does your team do and why? What outcomes will it achieve by when?	
Timing: Highlight any major milestones including the beginning and end time for the team.	
Resources and Budget: Define what people, organizations, tools, and money the team plans to use to achieve its purpose.	

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3. Team Operating Guidelines: Define the meeting structure and timing, problem-solving process, policy for making decisions and resolving conflicts and any other operating guidelines.	
4. Team Norms and Ground Rules: How will you communicate and share feedback, deal with commitment and involvement of members, set tone and celebrate successes?	
5. Team Roles and Responsibilities: What are the collective, paired, and individual responsibilities? Assign these specific roles:	Team Leader: Meeting Facilitator: Scribe: Process Observer: Timekeeper:
6. Charter Endorsement:	Sponsor's Signature: Team Members Signatures: 1. 5. 2. 6. 3. 7. 4. 8.

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