**team Charter TEMPLATe**

A **team charter** can be used to document what a team aims to accomplish and how it will work to achieve its goals. The charter should be developed collaboratively with all team members and revised as needed over time. The examples provided in this template reflect best practice and can be adapted as necessary to meet the needs of each team.

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9. **Project Name & Aim Statement:**

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| --- | --- |
| **Project Name** |  |
| **Aim Statement:** | Insert your team’s Aim Statement here.  *Template:*  *We aim to \_\_\_\_\_\_ because \_\_\_\_\_\_\_\_\_ for \_\_\_\_\_\_\_\_ by \_\_\_\_\_\_\_\_.*   * *We aim to:*    + *What are we trying to accomplish? (Improve, reduce, increase…)*   + *Be specific and achievable.* * *Because:*   + *Why is it important? “So what?”* * *For:*   + *Who is your target population?* * *By:*    + *What is the time frame for the project?* |
| **Summary/Other Details** |  |

1. **RESULTS & MEASURES**

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| **PERFORMANCE MEASURE / INDICATOR** | **Method** | **Baseline** | **Target** |
| We suggest choosing 2 or 3 performance measures , with one balancing measure. | Name the method of collection. | Where are you now on this measure? | Where do you intend to be at the end of the time frame? |
| [a national or state performance measure] | [survey, focus group, observation journal, in-depth interview, etc.] | [current number] | [our preferred future number] |
| [an existing quantitative measure we have] | [source, components of that data] | [current number] | [our preferred future number] |
| [a quantitative measure we made up and will have to go gather] | [For you to determine] | [TBA in a future version of the charter] | [TBA in a future version of the charter] |
| [a qualitative or process measure] |  |  | [a direction of change] |
| [a balancing measure, something that would help you detect unintended consequences] |  |  | [stay the same] |

**Other Goals / Deliverables**

1. Example – A process indicator [e.g. built capacity in service to the ultimate aim]
2. Example – A deliverable for this calendar year, something that moves the work forward [e.g. a milestone to hit on a longer journey]
3. Example-- a subjective / hard-to-measure qualitative goal [staff engagement, culture change]

**RESOURCE:**

Learning Institute Session, Developing Your Challenge and Aim Statement

Webinar (coming soon)

1. **PROJECT SCOPE**

* How are you scoping the project?
* What is “IN” and what is “OUT” of your scope?
* You can align this list with the implementation stage you are in, including activities you have agreed to focus on within that stage and an activity or two from the upcoming next stage.

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| --- | --- |
| In Scope | Out of Scope |
| [A thing we are explicitly working on;  an example] | [a thing that belongs to a future stage] |
| [another example of an area of work] | [work that belongs to a future partner] |
| “developing options, building connections with partners” | “making decisions about IT platforms” |
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**Resource:**

Learning Institute sessions related to Developing Your Challenge and Aim Statements, Causal Loop Diagramming, and Implementation Stages

1. **TEAM MEMBERS & STAKEHOLDERS**

* Who is on the team?
* Who is most immediately important to achieving the aim?
* Your full team may have a distinct function and may benefit from its own charter.
* (Will other teams be developed, with their own functions and charters?)

**TEAM ROSTER**

|  |  |
| --- | --- |
| Team Name |  |
| Team Member | Role, Responsibility, Commitment |
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**KEY STAKEHOLDERS**

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| **Other stakeholders** | **CONTRIBUTION to achieving the aim** | **Strategies to communicate and/or gain support** |
| [a person or group] | [What you need them for. Rationale for why they are key, in terms of contributions, power, influence…] | [an approach to help you achieve common goals with this stakeholder] |
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**Resources:** System Support Map, Team Building session

1. **Leadership & communication**

Propose a **format** for the team to report up to the senior sponsor, and a **frequency** for the report. Include the name of the person who is responsible to file that report.

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| **Communication format and goal** | **Frequency** | **Person responsible** |
| 30/30 report and short summary, via email, to communicate progress | Monthly | Kelly, Team Co-lead |
| One-on-one meeting to share needs and ask for help/resources | Weekly | Kelly and John, Team Co-leads |
| Updated charter, to keep goals aligned | Every three months or when major elements are adapted or completed | John, Team Co-lead |

**Communication Protocol**

Developing communication protocols for new or existing programs/initiatives establishes a transparent feedback process and furthers the development of a hospitable policy, funding, and operational environment.

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| **Domain** | **Notes** |
| Recipient |  |
| Sender |  |
| Rationale |  |
| Information to communicate  (e.g., updates, successes, challenges) |  |
| Responsible Individual(s) |  |
| Schedule, Time Allotted |  |
| Format |  |
| Response Timeline |  |
| Response Format |  |

1. **Logistics**

* When and where do we meet?
* Who needs to be there?
* How do we share documents?
* How do we communicate in between meetings?
* What else needs to be decided about how we complete the work?
* BONUS: When will you convene for your MCH WDC in-state consultation session?

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| Logistics | Decisions | Notes |
| Meetings |  |  |
| Documents |  |  |
| Communication |  |  |
| Resources |  |  |
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1. **Team agreements**

* Describe how you want to be together.
* What are the rules or guidelines that govern your behavior as a team?
* How will you hold yourselves accountable to those guidelines?

Example: We will… [behavior agreement] – [indicator that we are doing the behavior]

**Resource**:

Core Conversations (from Peter Block, *Community: The Structure of Belonging*)

Sweet Spot tool (from Craig Weber, *Conversational Capacity*)

Mutual Learning Teams model (from Roger Schwarz, *Smart Leaders, Smarter Teams*)

1. **The 30/30 Tool - Planning, Monitoring & Celebrating the Work**

30/30 Tool

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| --- | --- | --- | --- |
| **Date:** |  | **State: ­­­­­­­­­** |  |
| **Aim Statement** |  | | |

**Guidance:** Maintaining alignments is a dynamic process requiring continuous attention and communication. Use the guiding questions to track, align and learn from your efforts.

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| 1. **What have we accomplished?**   *Reflect on the action items from the last meeting. Each team member should briefly report on the action items for which they were responsible. If tasks have not been completed, figure out how to move forward.* | | | | |
|  | | | | |
| 1. **What have we each learned over the last 30 days?** *(Consider new information, observations, insights, results of data analysis, etc.)* | | | | |
|  | | | | |
| 1. **Does our proposed course of action still make sense?** *Do we need to adjust? Discuss any possible* c*ourse correction needed, dates to be updated/implemented.* | | | | |
|  | | | | |
| 1. **What (if anything) should we be communicating?** *To whom? Using what format? By when?* | | | | |
|  | | | | |
| 1. **What will each of you do over the next 30 days?** *Who will do what, by when? What is the deliverable? Capture this in your action plan below.* | | | | |
|  | | | | |
| 1. **When, where, and how will we get together next (in about 30 days)?** | | | | |
| Date: | | Time: | | Place: |
| 1. **Which statement best describes our team? (Select One)** | | | | |
| We’re working our plan and progress is coming along. | We’ve hit some road bumps and have had to make some adjustments, but our goals/outcomes and project are still the same. | | We’ve decided to make major changes to our project and/or outcomes. | |

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| **Action Plan** | | | | |
| **Work/Activity**  (What is the activity or work you are doing?) | **Product/Accomplishment**  (What is being produced or accomplished?) | **Indicator/Measure**  (How will you measure this activity or that work is happening? Data sources?) | **Person Responsible**  (Who is responsible for this work?) | **Frequency/Deadline**  (What is the frequency or deadline for this activity or the work you are doing?) |
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30/30 Tool - EXAMPLE

|  |  |  |  |
| --- | --- | --- | --- |
| **Date:** | **EXAMPLE** | **State: ­­­­­­­­­** | **EXAMPLE** |
| **Aim Statement** | **EXAMPLE** | | |

**Guidance:** Maintaining alignments is a dynamic process requiring continuous attention and communication. Use the guiding questions to track, align and learn from your efforts.

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| --- | --- | --- | --- | --- |
| 1. **What have we accomplished?**   *Reflect on the action items from the last meeting. Each team member should briefly report on the action items for which they were responsible. If tasks have not been completed, figure out how to move forward.* | | | | |
|  | | | | |
| 1. **What have we each learned over the last 30 days?** *(Consider new information, observations, insights, results of data analysis, etc.)* | | | | |
| * How to get stakeholder and partner input on core components of our project work using the **5Rs** * How to incorporate stakeholder and partner input to scope our project using a **Challenge Statement** * How to identify system-level factors using the **Key Drivers Diagram** * How to develop an **Adaptive Mindset** and a **Learning Mindset** * How to describe our program, including its different variables, and how these variables are related to a larger system using **Mental Models** **/ Causal** **Loop Diagramming**. | | | | |
| 1. **Does our proposed course of action still make sense?** *Do we need to adjust? Discuss any possible* c*ourse correction needed, dates to be updated/implemented.* | | | | |
| We’re **adjusting our Challenge Statement** to include \_\_\_\_ based on feedback received from the Full Team call and new ideas generated during the Learning Institute. We will send this out to the full team on June 30, 2021 to validate and finalize by March 13. | | | | |
| 1. **What (if anything) should we be communicating?** *To whom? Using what format? By when?* | | | | |
| We require **internal communication** to manage expectations of **agency leadership** regarding the timeline associated with our anticipated long-term outcomes. We will reach out to schedule in-person meetings with the appropriate person(s) to take place **by mid-July 2021**. | | | | |
| 1. **What will each of you do over the next 30 days?** *Who will do what, by when? What is the deliverable? Capture this in your action plan below.* | | | | |
| Camara Jones will follow-up on internal communication needs upon returning from the LI.  Ralph Ellison will reach out to the full team to validate and finalize the adjusted Challenge Statement. | | | | |
| 1. **When, where, and how will we get together next (in about 30 days)?** | | | | |
| Date: July 8, 2021 | | Time: 10am | | Place: Dolly’s office |
| 1. **Which statement best describes our team?** | | | | |
| We’re working our plan and progress is coming along. | We’ve hit some road bumps and have had to make some adjustments, but our goals/outcomes and project are still the same. | | We’ve decided to make major changes to our project and/or outcomes (please make sure changes are reflected on your logic model and measurement table). | |

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| **Action Plan** | | | | |
| **Work/Activity**  (What is the activity or work you are doing?) | **Product/Accomplishment**  (What is being produced or accomplished?) | **Indicator/Measure**  (How will you measure this activity or that the work is happening? Data sources?) | **Person Responsible**  (Who is responsible for this work?) | **Frequency/Deadline**  (What is the frequency or deadline for this activity or the work you are doing) |
| Schedule and hold meeting with agency leadership | * Meeting invite is sent * Meeting takes places * Agency leadership and team agree to sequencing of anticipated outcomes | * Meeting agenda and notes * Agency leadership and team have same understanding of timeline for anticipated outcomes | * Camara Jones | * Invite sent by June 30, 2021 * takes place by mid-July 2021 |
| Adjust and finalize Challenge Statement |  | Program record – the Adjusted Challenge Statement written in workbook and finalized statement written in work plan | * Travel team adjusts * Malik Yakini validates and finalizes | * Adjust by June 20, 2021 * Validate/Finalize by June 30, 2021 |
| Share Causal Loop Diagram with full team to get feedback/input | * Mental Model/ Causal Loop Diagram | Updated Causal Loop Diagram | * Malik Yakini | * June 15, 2021 * Feedback received by July 15, 2021 |

Please consider:

* What are some of the necessary activities needed to reach immediate short-term outcomes?
* What are some outcomes you hope to reach by the end of the Cohort?