# Team Charter Template | PATHS Teamwork Series

Estimated time: 7 minutes

**What is a team charter?**

* A team charter is a useful tool that can help your team work well together to achieve your goals.
* It’s a document that outlines a team’s purpose/objective, roles and expectations, and deliverables.
* During your first official meeting as a team, go through the steps below to create your team charter.
* **Tip:** You may want to spend 5 minutes to review these steps individually before re-grouping.
* **Step 1:** After reviewing your assignment, list the names of each team member, as well as their contact information and preferred choice for communication. You can share your pronouns here too.

## Contact List

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name, Pronouns** | **Preferred contact method** | **Back-up Contact Method** | **Email** | **WhatsApp/Phone** |
| *(e.g.) Aria Sadri, he/him* |  *Email* |  *Text message*  | *asadri@yorku.ca* | *(647)-400-8642* |
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* **Step 2:** List the major short-term and long-term goals that you have chosen to work with and need to achieve to successfully complete and submit your team assignment.

**Tips:**

* Need help setting goals? Create Specific, Measurable, Attainable, Relevant, and Timely (SMART) goals, learn more [here.](https://www.yorku.ca/scld/learning-skills/time-management/skills/)
* Need support to better understanding your assignment? Review this [checklist](https://learningcommons.yorku.ca/wp-content/uploads/2021/01/Understanding-Group-Assignment-Checklist.docx) or complete this step-by-step [module](https://spark.library.yorku.ca/understanding-the-assignment-assignment-requirements/)

##  Goals

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| --- |
| **Goals** |
| *(ex) Submit annotated bibliography with 10 peer reviewed sources*         |

* **Step 3:**  Get to know your teammates and their work styles. Discuss strengths, areas you want to develop, your preferences, and any stressors. This is a good time to share any information that will help you work well as a team and can help your team decide on roles and tasks.
* Team members should take time to reflect on these items for a few minutes independently before regrouping.

## Team Inventory: Get to know your team

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Skills/Strengths I am bringing**  | **Skills I want to develop** | **Preferences** | **Stressors** |
|  *(e.g.) Aria* |  *Research* |  *Writing* | *Having a detailed plan & weekly check in meetings before 7pm* | *Leaving things last minute & not receiving feedback* |
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* **Step 4:**Develop ground rules for how your team will work. The purpose of ground rules is to set out norms that your team agrees on and will operate by throughout the duration of the project.
* Write down your ground rules using the suggestions below, you may have others to add:
1. **Communication:** *How will we communicate throughout the duration of our project?*

(e.g.) We will communicate by email and focus on providing equal time for all members to speak and contribute. We will be transparent about our challenges and concerns. If we are unable to make a deadline or complete a task on time, we will communicate this as early as possible.

1. **Decision-making:** *How will we make decisions?*

(ex) We will allocate time for brainstorming as a team to present all ideas and then independently provide feedback to the faciliatory /leader who will present final ideas for decision.

1. **Conflict resolution:** *How will we resolve conflict?*

(ex) We will allocate time to discuss challenges as a team at the end of each meeting and pick an arbitrator/ mediator who will support conflict resolution among the team that individual team members can reach out to.

1. **Meetings:** *When/how will we meet and how will we structure our meetings?*

(e.g.) We will meet weekly for 30-minute check-in before class (Sept 27-Dec 9) and schedule bi-weekly work meetings via Zoom from 2-4pm (Sept 27-Dec 9).

* The first 5 minutes of our bi-weekly meetings will always include review of our team charter.
* Everyone will provide a brief update at our check-in meetings.
* Meetings will officially start five minutes after the agreed start time, and everyone should be there and ready by then.
1. **Diversity & Inclusion:***How will we support one another to succeed?*

(e.g.) We will find alternative ways to work as a team so that everyone is included and can contribute.

* **Step 5:** Assign roles that will help your team stay on track during team meetings, and divide important tasks and responsibilities.
* You may decide to rotate roles between team members to distribute workload or to give opportunity for different team members to learn different skills. Teams need to negotiate what works best for them as they identify what roles will fill their needs, and how best these roles are allocated.

## Roles

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| **Need help assigning roles? See** [**Guide to Group Roles & Maximizing Performance**](https://docs.google.com/document/d/1o2b7XhJ6M8nlXWflCj1VJXZkHfmlTuud/edit) |
| **Team Member** | **Role** | **Scope of Role** |
|  (e.g.) Aria |  Facilitator/Leader | * Starts the meetings, introduces each topic, and keeps the team on task and oriented towards its goals.
* Sends Zoom links for meetings
* Ensures that the team completes its tasks before deadlines.
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* **Additional Notes:**

(e.g.) Our team will rotate facilitators every two weeks

* **Step 6:** Looking at your major short and long-term goals, list out the key deliverables you will need to complete, with corresponding deadlines, in order to achieve your goals. Start from the end (your assignment deadline) and work backwards.

## Deliverables and Deadlines

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| --- | --- |
| **Deliverable** | **Deadline** |
|  (e.g.) Submit annotated bibliography in eClass |  April 4 |
|  (e.g.) Edit draft document and format |  March 28  |
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* **Step 7:** Each member should add their name and signature to the Team Charter to indicate that they have read, understand, and are committed to the Team Charter.
* If team members cannot add signatures in-person or digitally, the team can agree that each member typing their name in the signature section of the charter suffices as agreement.
* Be sure to keep a digital copy of your team charter in a central location where all members can easily access it.

## Signatures

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|  **Team Member’s Name** | **Team Member’s Signature** |
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* **Suggested next steps:** Create a Project Tracker with your team to assign specific tasks and divide workload. Use your team charter information to help determine tasks. Work backwards from the assignment due date(s) to map out deadlines and tasks. See the Learning Common’s [Tasks Planning Tool Template](https://learningcommons.yorku.ca/wp-content/uploads/2021/01/Tasks-Planning-Tool-Template.docx) and [Tasks Planning Tool Sample.](https://learningcommons.yorku.ca/wp-content/uploads/2021/01/TasksPlanningToolSample.pdf)

**Need more information about group work and working in teams?**

[Visit the Learning Commons @ York University, Guide to Group Work](https://learningcommons.yorku.ca/groupwork/)

[Learn more about being an effective team member](https://uwaterloo.ca/centre-for-teaching-excellence/teaching-resources/teaching-tips/tips-students/being-part-team/teamwork-skills-being-effective-group-member)

**Sources**

Adapted by PATHS, York University from: University of Calgary Team Charter Template Document Work” <https://www.ucalgary.ca/CTED/LS/rubrics/team_charter_template.docx>

Adapted by PATHS, York University from: [*Teamwork Skills: Being an Effective Group Member*](https://uwaterloo.ca/centre-for-teaching-excellence/teaching-resources/teaching-tips/tips-students/being-part-team/teamwork-skills-being-effective-group-member) byCentre for Teaching Excellence, University of Waterloo is licensed under [a Creative Commons license](https://creativecommons.org/licenses/by-nc/4.0/).



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