# Team Engagement Charter Template Instructions

## For Remote/Hybrid Teams

Purpose

A Team Engagement Charter can help establish best practices, define operational processes and help build effective working relationships among colleagues. It can also set clear expectations, define accountability, guide conflict resolution and build camaraderie.

As remote and hybrid teams become more common at Ohio State, creating a team-focused, living document is a valuable engagement tool for addressing the topics above and others relevant to your work and/or team, as well as influencing a positive and inclusive team culture.

Ideally, the Team Engagement Charter would be developed by all team members, not management, with the objective that everyone participates and is aligned with the final version. The team should review the initial charter after using it for three months to evaluate what is and is not working and revise, as needed. Thereafter, it is recommended the team review and renew the charter twice a year. It is also important to remember to share it as new members join the team.

For the purposes of this template, “team” is defined as those who report to the same manager or department leader, but it can also be used across teams for specific project work. The below categories are suggestions and can be changed to more appropriately meet the needs of your work and/or team.

Instructions

Here is a recommended process for creating a Team Engagement Charter. You will find the template on the following pages. Do not hesitate to use other categories that fit your team’s dynamics and/or preferences.

1. Ask for a volunteer(s) to coordinate meeting arrangements, needs and resources, and/or facilitate and capture the sharing of ideas. Share what the Team Engagement Charter is and the goals.
2. Schedule a team meeting (ok to schedule multiple if needed); make sure everyone can attend and use the same meeting mode for everyone to ensure everyone feels they are on the same playing field (e.g., in-person or virtual).
3. Share the template with all team members prior to the scheduled meeting. Ask them to come to the meeting with a few examples for each category.
4. Capture ideas for each category. If in-person, you can use sticky notes on an easel/whiteboard or pull the Team Engagement Charter Template up on a screen. If virtual, a host or co-host can share the template and enter ideas as they come up. Consider using virtual tools, such as the sticky notes functionality on Miro or whiteboard functionality in Zoom.
5. Compile ideas for each category, then share the draft charter with team members for review and comment. Ask if they see anything that is missing or that could be clearer. Share the final charter with all team members and mention the team will revisit it periodically to fine tune as needed.

Team Engagement Charter

**Department/Area/Team name:** [Add your text here]

**Team Members:** [Add your text here]

**Inception Date:** [Add your text here]

**Revised Date:** [Add your text here]

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| Collaboration Tools: What program(s) will be used for the purposes of shared work/project documents, when should the program(s) be used, who should have access and who decides who has access |
| [Add your text here]  Examples:   * Microsoft Teams: the following channels will be created with established Team: Meetings (individual folders for weekly stand-up meetings, monthly team meetings, and quarterly department meetings), Team Project Work (individual folder for each project), and Processes (individual folder for each team process) * Shared Drives (ex. One Drive) * Slack Channels |

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| Meeting Frequency, Tools & Etiquette: When will team meetings occur, who will lead, purpose for each, expected attendance (e.g., mandatory), length of meeting, mode of meeting (especially if a hybrid team), ways information/outcomes will be shared, define etiquette expectations (e.g., mute when not speaking, video on/off, etc.), how can we get all the voices in the room (e.g., being inclusive) |
| [Add your text here]  Examples:   * Monthly team meetings will be held the 3rd Wednesday of each month from 2:00-3:00p.m.; two team members will co-host each month; proposed agenda items are due to co-hosts 5 business days in advance of meeting; agenda will be sent to all team members 3 business days prior to monthly meeting to ensure efficiency and so team members are prepared for any discussion items, recommendations, solutions, action items, etc.; meeting participants are required to turn videos on; meeting participants should use the ‘raise hand’ function to indicate they have a question/comment * Weekly, virtual stand-up meetings will be held on Mondays 9:30-10:00a.m. (EST); participants are not required to turn their videos on; no agenda; format will be round-robin so each team member can share project/work status (team-based or external to immediate team) and request envisioned needs for team members for the week |

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| Communication Tools & Protocols: What, how, and when will information be shared among the team, who is responsible |
| [Add your text here]  Examples:   * Ad-Hoc as needed * Email * Microsoft Teams; monthly meeting co-hosts are responsible for providing meeting minutes to MS Teams Meetings channel within one business day of meeting; action items will appear bolded |

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| Team Schedules & Showing Status: Set expectations to share regular work schedules/locations, time out of office, access levels to calendars, establish what the status indicators mean and don’t mean (how should they be used/not be used) |
| [Add your text here]  Examples:   * Set Skype Status (free, busy, do not disturb, etc.) * At a minimum share free/busy calendar status with all team members * Share with team members during weekly stand-up meeting when you will be on vacation/out of office |

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| Team Member Contact Preferences & Information: How do individuals prefer to be contacted based on different types of work needs (e.g., IM, scheduled meeting, email, phone), what constitutes an ‘urgent matter’, does the contact preference change for urgent matters (e.g., text instead of IM), does the team have correct contact information for everybody on the team |
| [Add your text here]  Examples:   * Share cell phone numbers with team members in case of emergency * Try diligently to not contact outside of established core hours to allow for life-work alignment * Use Skype IM or MS Teams chat for quick hit questions |

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| Accountability, Decision-Making & Resolving Differences: How will the team hold each other accountable to this agreement and each other, what processes/protocols are needed related to decision-making, how will the team resolve differences in approaches to work, actions, thoughts, behaviors, etc. |
| [Add your text here]  Examples:   * Full or partial team-based projects will have a designated lead who will be responsible for ensuring work is done efficiently and effectively; leads will track when decisions are needed, propose recommendations for those decisions, determine when feedback on recommendations are due; disagreement on final recommendations will be addressed 1:1 with the lead * The team believes that the diversity of thought is an important aspect of their work and encourages members to ask clarifying questions and openly and respectfully share concerns, opinions and/or solutions to problems; team members are also expected to be receptive to other’s ideas and be willing to compromise when not in contradiction to established compliance and/or policy standards * Team members who may be struggling to communicate with one another are expected to first try to resolve their communication differences themselves before involving the manager |

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| Informal Interactions: How does the team want to create opportunities to interact socially/casually on an individual/team basis, whenwill those opportunities occur |
| [Add your text here]  Examples:   * Monthly team meetings will begin with an activity that provides members an opportunity to share something about themselves that is non-work related; co-hosts are responsible for determining and facilitating the activity * The last weekly team meeting of each month will be non-work focused and used to have coffee/breakfast together and catch up on whatever each member is comfortable sharing with others * A virtual lunch will be scheduled monthly for team members to catch up with one another; these lunches are encouraged but not mandatory |