Virtual/Hybrid Team Charter Checklist

Team Charters help to define the purpose of the team, how it will work, and the expected outcomes. By creating a team charter, the team creates a "roadmap" to ensure that everyone understands where they are headed, how they want to get there and what directions they need. Even team members who have been part of the team for years need to re-examine their team charter when making the move to a virtual/hybrid world.

Here are some key areas to focus on when building a Team Charter. Your team may be tempted to skip some areas, but we recommend that you at least validate that all are still in agreement, especially if you have new team members on board.

1. Vision and Values
- ✓ What is the purpose of this team? Why does it exist? What are we here to do? Why is it worth investing this time and effort?
- ✓ What shared values do we need to guide how we approach our shared work and how we work with each other? In which areas?
- ✓ What do these values look and sound like in action?
- ✓ How will we uphold these values and hold each other accountable?
- ✓ How will we measure our success? What will that look like? Feel like?

2. Team Processes
- ✓ How will we organize ourselves to accomplish the work? What is the best structure, given our respective work locations, hours, time zones and other factors?
- ✓ What roles are needed? Accountabilities?
- ✓ What planning and problem-solving processes are we going to use?
- ✓ How will we coordinate our efforts?
- ✓ How will we identify key interdependencies?
- ✓ What other stakeholders do we need to engage to do our work?
- ✓ How will we raise issues and flag problems?

3. Goals and Scope
- ✓ What is the scope of our work?
- ✓ What are the deliverables, and who is responsible?
- ✓ What timeframes must we work within? To what extent are these flexible, or immutable?
- ✓ How will we know we have successfully delivered what we promised?
- ✓ How do we measure our success as a team?
- ✓ How do we celebrate achievements and milestones?

4. Communications and Coordination
- ✓ What communication ground rules are especially important for the team to live by? For example, to what extent is active meeting participation important? What level of responsiveness

should we expect of each other? How important is it that we all use the same applications for common tasks?

✓ Under what circumstances do we use which form of communications, and why? For example, when is the team's Slack channel or SharePoint portal the best way to communicate? When are real-time meetings needed? How will we use asynchronous communication channels? What do we use email for?

✓ What information needs to be shared, and with whom?

✓ What is the best way to share and access information easily and quickly across the team? Outside of the team?

✓ What is the purpose of team meetings? How often will we meet, for how long, and at what time? Who sets the agenda? What technology will we use for prework? Meetings?

✓ How will we communicate between meetings? How often? In what ways?

✓ How will we keep up to date on the team's progress? How will we report progress and how often? How do we alert others that we're in danger of missing an important deadline?

✓ How accessible do team members need to be, and how do we signal our availability?

✓ In what ways do we want to communicate important changes, inside and outside of our team?

✓ How do we assign confidentiality to our communications? What kind of information can be shared with others? What restrictions are important to uphold?

✓ How do we collaborate to create a team glossary so that everyone uses consistent terminology and a shared vocabulary?

5. Authority and Accountability
✓ To whom is the team accountable?

✓ To whom are individual team members accountable?

✓ How will we make decisions? Who's involved with which decisions? What are their roles?

✓ What is the team's decision-making authority? Which decisions require outside approval, and what criteria will be used?

✓ What decisions can be made by subgroups and what decisions need to be made by the whole team? Which decisions need to be made by the team leader?

✓ How will we communicate certain kinds of decisions, and to whom?

6. Resources
✓ Who are the core members of the team, and what are their primary areas of expertise?

✓ Which stakeholders do we need to work with? Communicate with? How and why?

✓ If we need additional expertise, and what's the best way to access it?

✓ Which other groups or individuals need to be represented or consulted?

✓ What resources do we need to achieve our goals? How will we obtain them?

✓ What IT systems and processes will be needed by those in the office? At home or elsewhere?

✓ How will people cultivate knowledge and skills when using these resources?

✓ What others kind of training, knowledge or skills will team members need?

✓ What's the best way for them to learn and practice new skills?