

# Facilitator Guide: Team Building and Team Charter Creation

## Session Planner and Facilitator:

**Time:** 90 minutes

**Session Description:** Each team draws its membership from multiple stakeholders. This session equips each team with methods to create team norms, increase effectiveness of teamwork and maximize success, focusing primarily on issues and challenges that teams confront at the outset of their work. It will provide each team a facilitated opportunity to create a charter that will clarify and document how the team will accomplish its work. Ongoing challenges to team effectiveness will be covered as time permits.

Completing a strength, opportunities, aspirations, and results (SOAR) analysis is meant to occur in conjunction with, and in support of, creating the team charter. Ideally, these exercises will be conducted in close coordination. However, when necessary, it is possible to complete a team charter without an accompanying SOAR analysis.

**Session Goal:** By the end of this session, team members will create a team charter that guides them in deploying methods and tools to optimize teamwork.

## Session Objectives:

**OBJECTIVE 1** *Team members will be able to develop a team charter with content and mechanisms to:*

- ensure an aligned understanding of the team's primary mission and major goals.
- establish and maintain operating norms critical to team success by creating an accountable space agreement as part of the team charter.
- allocate roles and responsibilities.
- designate a formal team decision-making method.
- create meeting agendas.
- establish effective communication and information sharing.
- monitor performance and make timetable and milestone adjustments.

**OBJECTIVE 2** *Team members will exhibit the skills to:*

- communicate effectively with key stakeholders.
- directly address and manage conflict in a manner that promotes trust and interpersonal connection.
- hold focused discussions without sidetracking.

**Materials/Supplies/Space Needed:** In-person, teams should be grouped/seated together and have access to an easel, flipchart paper, markers, and a supply of large post-its. In a hybrid/virtual meeting, teams should be sorted into breakout rooms so that all members of one team are together and assigned a technical assistance staff member to reiterate instructions, provide links and assist with Jamboard/Mural.

- A copy of the *Charter Template* for each individual
- A copy of the *Team Building – Definitions, Concepts and Guidance for Creating a Team Charter* document for each individual.

## Pre-Session Preparation:

- Flipchart paper easels should be in place at each table and/or Jamboard/Mural virtual site set-up.
- Ideally, team leaders should have attended a previous team leadership virtual training session.

Familiarize yourself with the relevant technical assistance resources and materials on the following topics:

- All Foundational Activities tools and resources
- Creating a Culture of Equity: Introduction to Theoretical Frameworks
- SMARTIE Goal-setting.
- Strengths, Opportunities, Aspirations, and Results (SOAR) Analysis

## Session Activities:

**Provide a detailed description of the session (including timing breakdown)**

### • 10 min

AHE TA Facilitator Introduction, Session Goals, and Objectives

- Example facilitator prompts to gain buy-in:
  - “What is one thing you’re hoping to learn today?”
  - “What do you think about the idea of creating a team charter?”
  - “What would you tell a friend who is skeptical about this project/process?”

### • 15 min

AHE TA Facilitator will cover points listed above under Objectives, introduce team members to the *Team Building* resource document and the *Charter Template*.

### • 50 min

Teams will designate a facilitator for the session and work together to create a team charter

### • 15 min

AHE Facilitator will conclude the session and ask 2-3 teams to report out on their team process and different sections of their charter.

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## ABOUT AHE

Advancing Health Equity: Leading Care, Payment, and Systems Transformation (AHE) is a national program supported by the Robert Wood Johnson Foundation and based at the University of Chicago. AHE’s mission is to discover best practices for advancing health equity by fostering payment reform and sustainable care models to eliminate health and healthcare inequities.