

ADVANCING HEALTH EQUITY LEARNING COLLABORATIVE

# Foundational Activities: Team Charter (Presentation)

# Why this session?

- // Each Learning Collaborative team is composed of individuals representing multiple complex organizations.
- // Each team has a different mix of stakeholders inside and outside of the partner organizations.
- // This is a multi-faceted complex project.
- // Teams need to work as efficiently and effectively as possible.

# Session Goal

To outline and explain steps a team can take to set itself up for success and to take those steps today.

# Agenda

## / Introduction

## / Eight Steps

1. Align on mission and goals
2. Determine members
3. Allocate roles
4. Determine timelines
5. Define accountability
6. Define operating norms
7. Manage meetings and teamwork
8. Create the Team Charter

## / Team Meeting

## / Team Report Outs and Questions

# What is a team?



A group is a bunch of people in an elevator that is not yet a team.

A team is also a bunch of people in an elevator, but the elevator is broken.





Who's been stuck in an elevator before?

Who knows how elevators work?

Whose phone has the best reception?

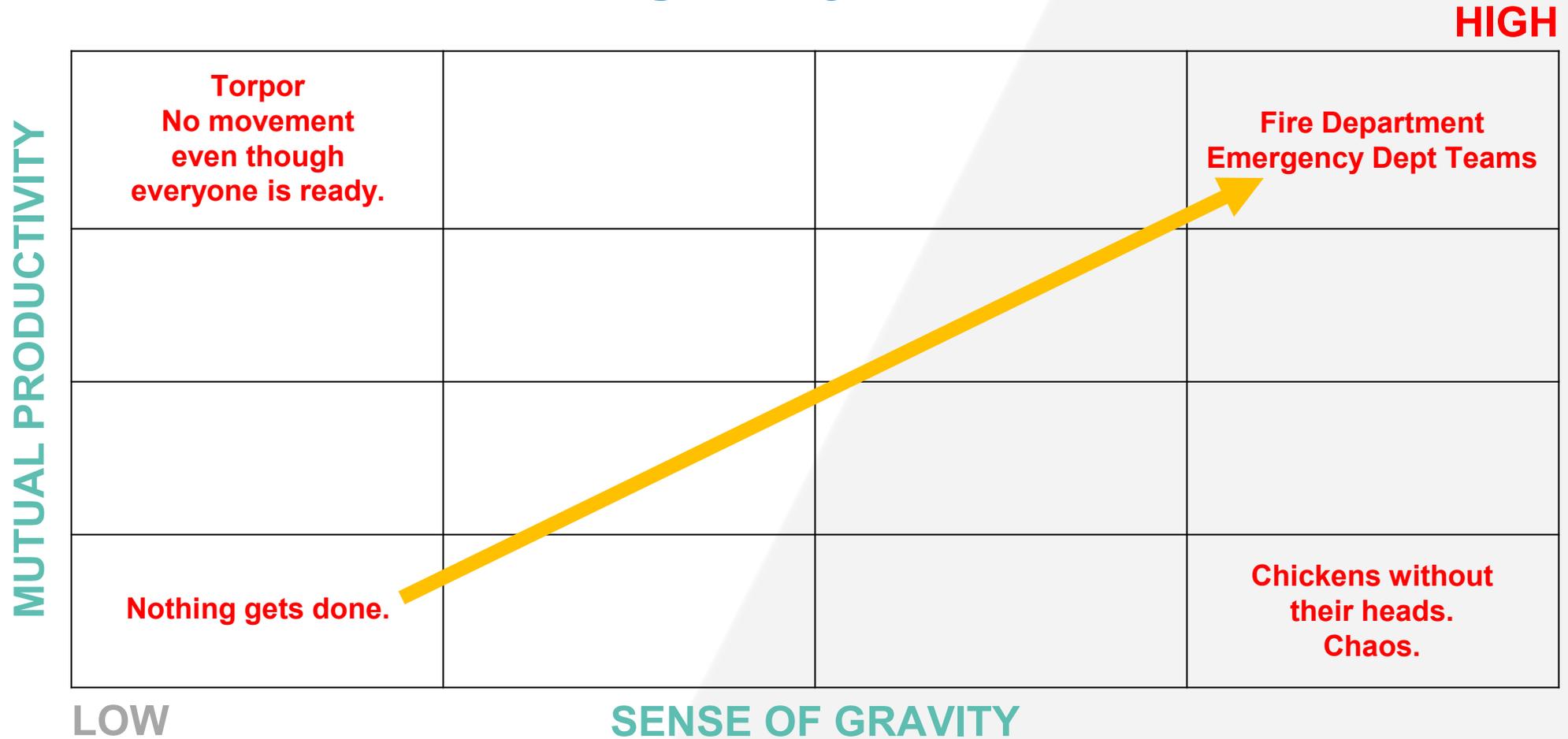
The mood inside the elevator is intensified when it stops. Emotions are aroused. Conversation in the elevator begins, and will likely include questions such as:

# Experience Expertise Tools and Resources

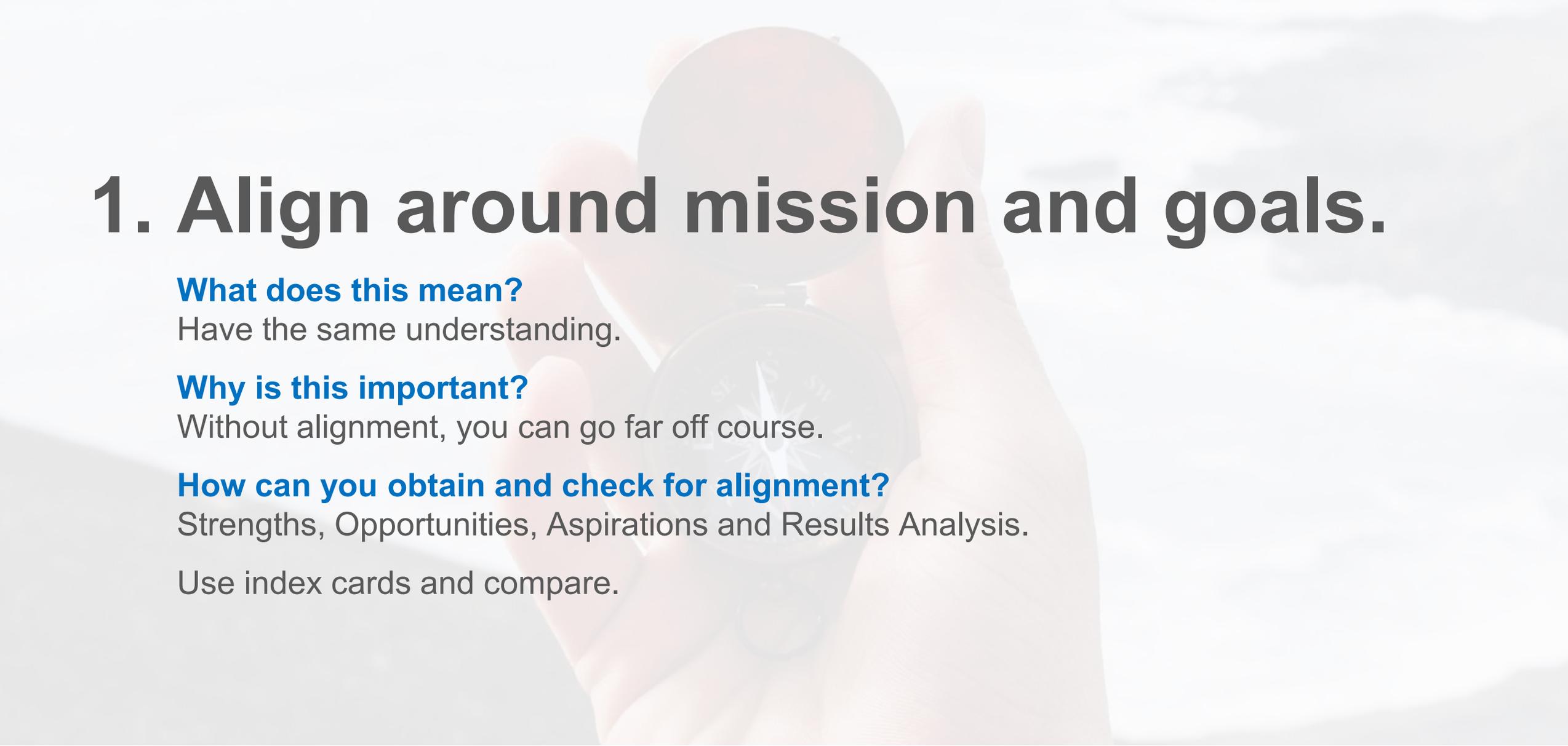


The new team members galvanize around a sense of gravity and the need to collaborate.

# Effective teams exhibit mutual productivity and sense of gravity about their work.



Effective teams can **take specific steps** at the outset of their work **to promote** a sense of mutual **productivity** and **gravity**.



# 1. Align around mission and goals.

## **What does this mean?**

Have the same understanding.

## **Why is this important?**

Without alignment, you can go far off course.

## **How can you obtain and check for alignment?**

Strengths, Opportunities, Aspirations and Results Analysis.

Use index cards and compare.

# 2. Determine membership.

## **What does this mean?**

Who are the core members? Who are the support members?

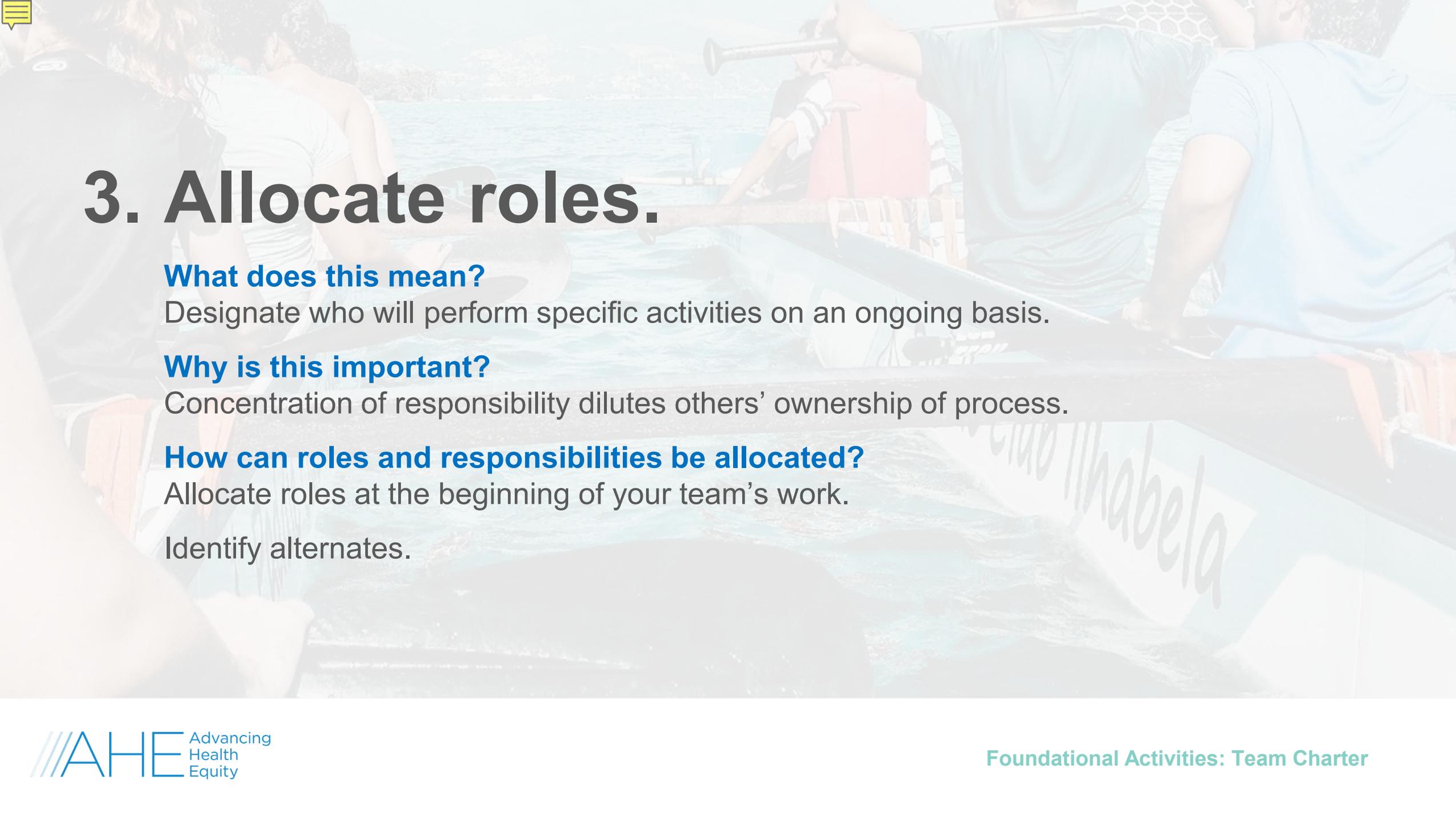
## **Why is this important?**

It is essential for defining roles and accountability.

## **How can you identify the necessary members?**

Conduct and regularly update a stakeholder assessment.

Earn the trust of patients and community members who hold key perspectives.  
Invite them to the team.

A background image showing a group of people rowing a boat on a body of water. The image is semi-transparent, allowing text to be overlaid. The rowers are wearing blue and red shirts. The boat has the name 'Thabela' written on its side.

# 3. Allocate roles.

## **What does this mean?**

Designate who will perform specific activities on an ongoing basis.

## **Why is this important?**

Concentration of responsibility dilutes others' ownership of process.

## **How can roles and responsibilities be allocated?**

Allocate roles at the beginning of your team's work.

Identify alternates.

# 4. Determine Timelines

## What does this mean?

Designate when the team forms, projected completion date, project phases, and target milestones.

## Why is this important?

Builds an appropriate sense of gravity and a realistic assessment of progress.

## How can you know the future?

You cannot. Timelines and milestones will be consistently updated.

Remember that this Learning Collaborative team is designed to initiate long-term, ongoing, and expansive work.

# 5. Define accountability

## **What does this mean?**

Responsibility for a specific piece of work.

## **Why is this important?**

Without accountability, the work does not get done or others take it on.

## **How can you address accountability?**

Agree on how to address lack of accountability.



# 6. Define operating norms

## **What does this mean?**

Accountability in countering ways of being together and doing our work that generate and maintain inequities.

## **Why is this important?**

It establishes care for others in the work we do and the conversations we have.

## **How can you address operating norms?**

Adopt an accountable spaces framework.

# 7. Manage meetings and teamwork.

## **What does this mean?**

Agreements for managing time, how to make decisions, topic and task prioritization, and between meeting work.

## **Why is this important?**

To minimize lack of focus and maximize productivity. Attends to power and how it is used within the team.

## **How can you address team management?**

Ensure that decision making processes are agreed upon, transparent, and attentive to power differences within the team.

# 8. Create a team charter.

## What does this mean?

A written agreement of how the team will work.

## Why is this important?

Without a charter, team process is less effective.

## How can you create a team charter?

Use the provided template.



# When effective teams begin their work, they...

1. Align on mission and goals.
2. Determine membership.
3. Allocate roles.
4. Determine timelines.
5. Define accountability.
6. Define operating norms.
7. Manage meetings and teamwork.
8. Create a team charter.

# Team Meetings

Create a team charter using the provided template.

## TEAM MEETINGS LOCATIONS:

**Breakout space #1**      (Insert Team Name)

**Breakout space #2**      (Insert Team Name)

**Breakout space #3**      (Insert Team Name)

....

# Team Report Outs

Insert instructions for conducting team report out procedures.

Consider having different teams report out on different sections/topics of their charters.

Questions and Comments

## **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 disparities.

For more information visit [advancinghealthequity.org](https://advancinghealthequity.org)