

A charter is a document that defines a team's purpose, values, and how members have agreed to work together. This guide, which includes a charter template, will help clinic teams discuss and create their own team charter. Grounded in Team-based care principles, this process builds commitment, collaboration and communication. The act of coming together to define values and team processes can be just as important as the written charter itself.

## Instructions

It helps to have someone guiding the process who can facilitate the discussion and pull the ideas together into a draft. This could be a team member or an external facilitator.

Effective facilitation ensures every voice is heard, establishes psychological safety and turns the charter into a living agreement that guides daily practice, strengthens teamwork and enhances person-centred care.

### Best practices

- Ideally, teams should create their charter in-person, but it can be done virtually.
- The key is to ensure everyone is involved. If time's tight, you might want to consider breaking the process into a few shorter meetings and tackle one or two topics at a time.
- Your team might need longer to decide some details and can revisit later to finalize everything.

### During the meetings

- Consider using sticky notes and a whiteboard.
- The key topics to discuss are listed below in **Appendix A**; start with purpose and values.
- For each topic, ask guiding questions and record everyone's responses.
- Encourage open discussion and aim for consensus.
- Group together common themes and draft statements based on these.
- Remember to save your work along the way.

### After the meetings

- Refine the statements that were drafted during the meeting.
- Create a draft charter, using or adapting our template (**Appendix B**) or your own document.
- When ready, hold a follow up meeting to go over the draft charter and make needed changes.
- Once the final charter is agreed upon, have every member sign it and keep it accessible.
- It's important to remember that a team charter is a living document. It should grow and adapt as the team learns and develops new ways of working together. To keep it relevant and actionable, your team should review and update it regularly.

## Appendix A: Charter Components and Questions to Consider

Component / section	Questions to consider	Example statements
<b>COLLABORATION AND CULTURE</b>		
<b>Our shared purpose</b>	<p>Who do we serve?</p> <p>What services do we provide?</p> <p>What impact do we wish to make for our patients?</p>	We are committed to providing exceptional maternity care through open communication, mutual respect and continuous learning as a team.
<b>Our values</b>	<p>What words reflect our values?</p> <p>What are the most important values we hold as a team?</p> <p>How do we want to operate in relation to patients and our team?</p> <p>How do we include our patients in decision-making?</p>	Person-centred care, compassion, respect, safety, accessibility.
<b>Reflecting and learning</b>	<p>How can we regularly reflect on challenges and successes?</p> <p>How can we improve as a team?</p> <p>How can we learn from each other?</p> <p>How do we encourage curiosity?</p>	<p>We report errors and near misses openly to prevent future occurrences.</p> <p>We understand we'll all make mistakes and avoid blaming each other.</p> <p>We hold regular debriefs to reflect on challenges and successes.</p> <p>We share expertise freely between team members.</p> <p>We celebrate learning opportunities and new insights.</p>
<b>Respect</b>	<p>What words come to mind when you think about respect?</p> <p>How will we ensure a respectful environment within the team?</p>	<p>We treat each team member and every role with dignity.</p> <p>We acknowledge and respect different working styles and perspectives.</p>

# Team Charter Guide



▶ Accelerating Change Transformation Team

	What behaviours would negatively impact our working relationship?	We maintain professionalism even during stressful situations.
<b>Decision-making</b>	How will we create a culture of empowerment?  How will we define the limits of decision making?	When disagreements arise, we focus on what's best for the patient.
<b>Celebration</b>	How will we celebrate success?  Why is celebrating success important to our team?	We take time at team meetings to celebrate accomplishments and successes.
<b>Commitment and accountability</b>	Have all team members signed the charter?  Is the review date set?  Where should we keep the team charter, so it is visible and accessible to all team members?  How will we hold ourselves accountable for the terms of the charter?	We regularly check in on how we're doing as a team.  We will review this charter every six months.  We hold ourselves and each other accountable to these agreements.  By signing below, we agree to uphold these standards and support each other in creating a respectful environment for our team and patients.
<b>COMMUNICATION</b>		
<b>Meetings</b>	How will we share information?	We hold daily team huddles to discuss the day ahead.  We hold weekly team meetings to discuss larger issues.
<b>Speaking up and listening</b>	What are the basic commitments we make to each other about how we will communicate?  What is acceptable communication within our team? What is unacceptable?  What can get in the way of assertive or empathetic communication?	We voice concerns about patient safety without fear of judgment.  Questions are welcomed and encouraged, regardless of role.  We use the DESC and CUS communication tools to support speaking up. We pause before responding when emotions are high.

# Team Charter Guide



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	<p>What structured communication tools and approaches could we try?</p> <p>What processes and tools should we use to manage disagreements?</p>	<p>We consider the perspectives and experiences of others and separate the facts from thoughts and feelings.</p> <p>We give and receive feedback with the intent to improve patient care.</p> <p>Feedback focuses on actions and outcomes, not personal characteristics.</p> <p>We try to address issues directly with each other before escalating.</p>
<b>COORDINATION AND COMMITMENT</b>		
<b>Task coordination</b>	<p>Do we understand each other's scope of practice?</p> <p>Do we understand the roles of everyone in the clinic?</p> <p>Why is role clarity important?</p> <p>How will we back each other up during busy periods?</p> <p>What does mutual support look like?</p>	<p>We work to the top of our scopes and distribute workloads accordingly.</p> <p>Everyone understands their roles and the roles of others.</p> <p>We communicate our competence and capacity honestly.</p> <p>We help each other during busy periods without being asked.</p>
<b>Care transitions</b>	<p>What is most important during care transitions and handoffs?</p> <p>What should be included in a handoff conversation?</p> <p>How should we introduce patients to team members?</p>	<p>We use the SBAR communication tool during care transitions.</p> <p>We create a warm handoff in person, whenever possible, between team members in the clinic.</p> <p>We take time to explain referrals and roles of care providers outside the clinic to our patients.</p>
<b>Team signatures &amp; date</b>		
<b>Review date</b>		

**Key sources:** [Team Charter Template](#): Team-based Care BC; [COACT Collaborative Care Team Charter Guide](#): Alberta Health Services.

## Appendix B: Team Charter Template

<b>Clinic name:</b>	
<b>COLLABORATION AND CULTURE</b>	
<b>Our shared purpose</b>	
<b>Our values</b>	
<b>Reflecting and learning</b>	
<b>Respect</b>	
<b>Decision-making</b>	
<b>Celebration</b>	
<b>Commitment and accountability</b>	
<b>COMMUNICATION</b>	
<b>Meetings</b>	
<b>Speaking up and listening</b>	
<b>COORDINATION</b>	
<b>Task coordination</b>	
<b>Care transitions</b>	
<b>COMMITMENT</b>	
<b>Team commitment</b>	By signing below, we agree to uphold these standards and support each other in creating a respectful and safe environment for our team and our patients.
<b>Signatures</b>	
<b>Date</b>	
<b>Next review date</b>	

Editable version of the [charter template available here](#)