**The WHY for a Team Charter**

High performing teams do NOT happen by accident, they happen by design. The Team Charter gives you a framework to design your senior leadership team so you can embrace the diversity of people and roles in the team, make effective decisions and have clarity and focus on delivering results that take you towards your shared team goals and purpose.

Your team charter defines the purpose of your team, expected outcomes and how your team will work together for results. It is a set of agreements created when you form the team to ensure everyone is on the same page from the start. It must support and align with the organisation’s vision and purpose, but it is for you as the team to design it.

A clearly articulated team charter provides the foundation for developing goals and action plans that will assist your team in reaching its desired outcomes. The team charter statement contains three key elements:

• What does the team do?

• For whom does the team perform its functions?

• How does the team go about doing its job?

Note that for whom the senior leadership team performs its functions is NOT for whom your function team that you lead performs its functions. (*I suspect here that your leadership team performs its functions for the executive team, to enable pensions to deliver on the organisation purpose… with client focus. )*

In the second session (this session) we are focusing on identifying the purpose, vision, values that will guide the team’s decision making and actions as a team and behaviours that describe and align with the values or conflict with the values. We want to clarify our overall shared goals as a team and how our function roles contribute to those goals. We’re also looking at how our function head roles/responsibilities and accountabilities contribute and/or impact on the team collaborating as a whole. These conversations are vital for us to be able to achieve the top three levels in the Lencioni model we talked about in the last session – commitment to decisions, being accountable and responsible and putting team priorities first.

In this session, we are also importantly checking how well the purpose, vision, values, and shared goals align with the organisation’s purpose visions nad values.

Once these are clear, we can then focus in the next session on the HOW we go about working together – our mutual expectations, and operating procedures, including when, frequency and how we have team meetings, ways of communicating, decision making, resolving conflict, measure success, and create the team environment that we’ve talked about in the first session based on Patrick Lencioni’s model of the 5 levels for a high performing team:

1) team members trust each other to have honest conversations without fear of blame

3) openness to listening to all perspectives without fear of conflict,

3) committing to team decisions that are the best outcome for the team as a whole even when it conflicts with your own preference,

4) holding yourselves accountable and responsible to decisions and your team charter, and

5) always putting the team priorities/goals ahead of your own personal or function goals and priroirties.

The Terms of Reference which you started and Dean circulated was a step in this direction. When you can agree your team charter, it provides you with the platform to collaborate effectively as a senior leadership team and contribute to the strategic direction for the pensions business as a whole.

This session (2) and the next (3) offers an opportunity for all team members to determine the purpose of the team and direction it takes in order for it to achieve its’ goals.