



Creating a Communications Charter - Overview

WHAT IS A COMMUNICATIONS CHARTER

A communications charter is a collectively-designed and mutually agreed-upon summary of norms, expectations, and practices for a group. It is a set of guidelines for best practice, not a rule book. **It generally takes 2-3 group conversations to address the various communication aspects that are important to your team.** As a living document, your charter should be reviewed, adjusted, and refreshed as needed.

STEPS FOR CREATING A CHARTER

Begin with self-reflection. Consider what is important to you, as the group leader, regarding communication standards, practices, and tools. Remember, for a charter to be most effective, it must be created by everyone in the group, not mandated by you. Consider these questions:

- What technologies do I prefer for what tasks?
- What standard formats do I prefer in our written communication?
- How do I think we should keep everyone in sync?
- What do I prefer regarding response time to a request?
- What do I prefer regarding in-person and virtual meetings?
- What other norms do I think should be articulated?

Determine **who will take the lead** on pulling the charter together. This includes taking notes at group meetings, creating 1-2 document drafts, soliciting feedback, and completing the final document. Meet with them before and after each group meeting.

Determine the communication topics that are most important for your group. We recommend your first conversation be about keeping everyone in sync.

Invite your team members to reflect on the questions above in preparation for your communications charter discussions.

Plan on 20-25 minutes of group discussion for each communication topic. See the next page for a step-by-step facilitation guide you can use repeatedly.

MAINTAINING A CHARTER

Store the charter in a shared, easily-accessible location.

Periodically **review** and **update** your communication charter.

Anticipate missteps. See the last page of this guide for strategies to get back on track.



Creating a Communications Charter - Leading Discussions

STEP-BY-STEP FACILITATION GUIDE

Start with something like this:

Thanks for coming. The purpose of today's meeting is for us to begin to **collectively create a communications charter** to help us consistently communicate effectively with one another, our colleagues, and our clients. As we engage in conversation, I expect we will learn more about each others' preferences. We need to understand these preferences but not be driven by any one of them in particular. We are creating something that will help us **as a team** do our best work.

Introduce the communication topic to be discussed. For this example: **assuring everyone on the team is informed and in sync regardless of where they are physically located.**

Then, invite people to engage in some brain-writing. Ask participants to write down as many ideas as they can in 1 minute for your selected topic. In this example, assuring everyone on the team is informed and in sync regardless of where they are physically located. Set a timer for 60 seconds. The goal at this stage is quantity of ideas.

Next, ask individuals to circle one item from their list that they believe has the highest probability of ensuring effective communication.

If your group has fewer than 10 people

- Ask each person to share their one item and why it's important
- As a group, discuss the ideas allowing people to ask questions and refine ideas.
- Aim to collectively agree on 1-2 ideas that the group believes have the highest probability of ensuring effective communication (these can be a combination of presented ideas)

If your group has 10 or more people

- Break into smaller groups of 3-4
- Offer the following instructions:
 - Each person share their one item and why it's important
 - Together, discuss the ideas in order to collectively select one item that the group believes has the highest probability of ensuring effective communication (this can be a combination of presented ideas)
 - Have each group report their item when back in the large group

Thank people for their engagement and indicate when you will discuss other topics relevant to your communications charter. Because a charter is a living document, plan on building it over time after each discussion you have.

Want to participate rather than facilitate?
Leading this discussion not your thing?
CLOC can help.

Contact us to learn how we can partner with you to create your communications charter for a modest fee.



Creating a Communications Charter - Example Charter

Group name:

Dates of discussions:

Date plan was approved:

Timeframe for periodic review of plan:

How we will keep everyone in sync

- Our overlapping work hours are 10am-2pm Tuesday through Thursday.
- Share weekly status updates via the "This Week" Google doc by Friday at noon.
- Send an email to the group if your schedule changes for the day or week (e.g., illness, vacation, errand).

Technologies we will use for particular tasks

- Scheduling via email; questions via text.
- If email is longer than 2 paragraphs, pick up the phone.
- Don't use email for sensitive interpersonal issues.

Standard formats for written communication

- Highlight or bold action items in emails.
- Use headings and subject lines that include agreed-upon key words like "For Decision," "Informational," or "For Review & Approval."
- Start your email with the response you need.
- Don't use cc to tattletale.

Expected response time for requests

- Acknowledge receipt within 24 hours even if immediate action is not possible.
- Use snooze function on Gmail as needed to remind you to respond to an email.

When we meet in person, virtually, hybrid

- Monday staff meetings are in person.
- If 3 or more people are attending a meeting virtually, then everyone should attend virtually.

Other

- Be clear about who can have access to particular information.
- Aim for 45-minute virtual meetings to allow for a break.
- Whenever possible, keep video on during virtual calls.



Creating a Communications Charter - Anticipate Missteps

Even with a communications charter, people may make mistakes. Follow these strategies to get back on track.



Remember that your communications charter is a set of guidelines for best practice **not a rule book**.



Assume good intent. We all make mistakes from time to time.



Explore **what's getting in the way** of following the charter.



Make exceptions when necessary to **accommodate individual challenges** and needs.



Clarify that the purpose of the charter is to help **everyone** in the group do their best work.



Consider that it may be time to **revisit** the charter and make adjustments.



When you notice repeated missteps from the same person, **prepare yourself** for a performance management conversation.