

Team Agreement Instructions & Template



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Team Agreement Instructions:

These instructions will help you lead your team in creating a simple team agreement in three phases.

- **Phase 1:** Create a clear statement of purpose.
- **Phase 2:** Define goals and objectives.
- **Phase 3:** Agree on how the team will work together.

1. Set aside 4 weeks to complete.

Consider breaking the three sections out in a weekly meeting and wrapping them together for a final walk-through. Agree on official agreements on the fourth week.

2. Ask questions.

This process uses a question-and-discussion approach. This encourages participation encouraging team members to:

- Hear each other's thoughts, opinions, and perspectives,
- And to co-create the team's direction and working approach.

3. Document responses.

During discussions, capture the team's responses and ideas on flipcharts or whiteboards. Document key decision on a "draft" team agreement document in your team meeting folder. This final documentation will serve as your team's agreement.

4. Use a variety of discussion methods.

While this process works well when the full team discusses each question, varying the approach can add variety to the process. You can:

- **Focus strategically:** Post questions on flipcharts and have team members travel from chart to chart, writing their responses. Then discuss their responses.
- **Use small-group breakouts (pairs or larger):** Breakout groups discuss the questions, then report their findings to the full group.
- **Use individual reflection:** Each member privately answers one or more question(s), then everyone reports their findings. Or, answers can be collected and read to the group.

5. Allow time to create an effective team agreement.

Don't rush the process. Also, be mindful that team members may get impatient. Break up the process as much as possible; add variety where you can. You may also need to help the team understand that setting up clear agreements within the team will help the team work toward its goals more effectively.

Phase 1: Create a clear statement of purpose.

Set Up	At the start, briefly explain that you will lead the team through a three-phase process of creating a team agreement. The agreement will help the team clarify its purpose, goals, and working approach so you all know where you are going and how you will get there.
Time	30 to 90 minutes depending on length of discussion.
Step 1	Discuss the team's general purpose. As a team, answer the following three questions. Allow enough time for full discussion of each question before moving to the next. <ul style="list-style-type: none">• What are we here to do?• Why is this work important to our agency, #TeamCity, our community, etc.?• Why do we care about this work?
Step 2	Pull themes from the previous discussion. <ul style="list-style-type: none">• What critical themes have emerged from this discussion?
Step 3	Create a purpose statement. Have small groups break out, craft their own statements, then report to the full team. Members can combine and tweak these statements until they create a final statement that all team members support. <ul style="list-style-type: none">• How might we capture this discussion in a meaningful statement of purpose?
Wrap Up	Capture the notes in a draft agreement to reaffirm before starting Phase 2.

Phase 2: Define goals and objectives.

Set Up	In this phase, you'll decide upon key goals and objectives. Often, at the beginning of a team's development, you and the team may not be able to foresee all the goals, objectives and activities that will be necessary; some may only become evident once the team is further along. Nevertheless, this process will help the team clarify the most important goals.
Time	30 to 120 minutes depending on length of discussion.
Step 1	Brainstorm possible goals. At this point, aim to capture key phrases, not fully developed SMARTER goals. <ul style="list-style-type: none">• As we work toward achieving our purpose, which key goals or objectives will help us there?

Step 2	Brainstorm possible measurements to define success. <ul style="list-style-type: none"> • What might we measure, assess or calibrate against so we'll know when we have reached our goals?
Step 3	Decide on goals. Following the discussion, if the list of goals needs to be shortened or prioritized, ask members to vote on them. <ul style="list-style-type: none"> • From our list of possible goals, which do we want to embrace, and why? Which goals should we discard or put on hold?
Step 4	Create SMARTER goals. <ul style="list-style-type: none"> • How can we craft each of these into a SMARTER goal?
Wrap Up	Capture the notes in a draft agreement adding to Phase 1, Team Purpose Notes. Review the document to date before starting Phase 3.

Phase 3: Agree on how the team will work together.

Set Up	This phase sets the team's ground rules, accountability, key activities and roles. These elements define the team's tactical and operational approach – that is, how the team will do its work.
Time	30 to 120 minutes depending on length of discussion.
Step 1	Brainstorm potential ground rules for the team. After the discussion, hold a vote to help the team decide on three key ground rules. <ul style="list-style-type: none"> • Which three rules of behavior are critical for this team's successful performance?
Step 2	Discuss shared accountability for the ground rules. <ul style="list-style-type: none"> • Given these ground rules, how will we hold each other accountable?
Step 3	Discuss potential logistical aspects of the team's working arrangement. After the discussion, vote on how to prioritize these. <ul style="list-style-type: none"> • What logistical aspects must we discuss for team operations and communication?
Step 4	Decide on key activities for the team. <ul style="list-style-type: none"> • Which key activities will enable us to accomplish our goals?
Step 5	Decide on key roles. <ul style="list-style-type: none"> • Who will "own" each activity?
Wrap Up	Capture the notes adding to the two previous phases in your draft "team agreement" document. Bring it back to the team for a final draft and agreement to start using it in your interactions. Remember to refresh it any time a new member joins.

HR-OD Team Agreement Example



Team Name	Human Resources – Organizational Development Unit
Team Members	Anne Nowak Kara Kratowicz Emily Jamieson Jay Winston Andie Hopkins
Team Purpose	We work with key stakeholders to increase organizational health and effectiveness.
Team Goals	Our goal is to provide support to agencies and staff to help develop and organization that is: <ul style="list-style-type: none"> • Healthy • High-performing • Self-renewing • One that leads and manages change.
Team Measures	We measure our effectiveness through our work plan completion and its measures, successful solutions, customer feedback, and employee feedback.
Team Agreements <ul style="list-style-type: none"> • Behaviors: Acceptable & Unacceptable 	<div style="display: flex; justify-content: space-between;"> <div data-bbox="444 940 980 1360"> </div> <div data-bbox="997 940 1516 1360"> </div> </div> <p>We build psychological safety and accountability through the following agreements:</p> <ul style="list-style-type: none"> • Continuous Learning & Improvement • Integrity & Authenticity • Focused Collaboration • Self-Awareness & Empowerment • Private Disagreement, Public Unity
Team Communication <ul style="list-style-type: none"> • Meeting Frequencies • Type • Format 	<ul style="list-style-type: none"> • Weekly 15-minute huddle on Mondays at 8:45 am. <ul style="list-style-type: none"> ○ Kick-off the week ○ Touch base on individual priorities for the week ○ Share weekend happenings if comfortable • Weekly HR-OD Team meeting on Tuesdays at 1:00 pm. <ul style="list-style-type: none"> ○ Pre-populate agreed-upon meeting agenda ○ Come prepared

Team Agreement Template



Team Name	
Team Members	
Team Purpose	
Team Goals	
Team Measures	
Team Agreements <ul style="list-style-type: none">Behaviors: Acceptable & Unacceptable	
Team Communication <ul style="list-style-type: none">Meeting FrequenciesTypeFormat	