



Alberta Health  
Services

# Collaborative Care Team Charter Guide



## Collaborative Care Team Charter

### The Purpose of a Team Charter

Teams work more effectively when they are united towards a common purpose, when individual responsibilities are known, and when all team members are clear about their roles and expectations. A Team Charter is a document that defines the vision/purpose of the team, team values, operating rules, and accountabilities. The charter lays out a “blueprint” for conducting business and defines how the team will operate in an empowered manner. A team charter also facilitates stakeholder buy-in by including team members in the decision making process. A charter:

- Provides a link between the team’s goals and the AHS over-arching mission, vision and goals
- Reinforces Collaborative Care
- Should be developed and agreed to by the team itself
- Should be a living document and be revisited on a regular basis to ensure that it is current, particularly as new members join the team

### The Components of a Team Charter

The Team Charter supports Collaborative Care and will be mapped to the Canadian Interprofessional Health Collaborative (CIHC) National Interprofessional Competencies.

The components of the Team Charter include:

1. The Team Vision/Purpose
2. Patient and Family Centered Care
3. Role Clarification
4. Interprofessional Communication
5. Team Functioning
6. Collaborative Leadership
7. Interprofessional Conflict Resolution
8. Accountability and Sustainability Agreement

## Team Charter Template Development Guide

### 1. Team Vision/Purpose

The team vision identifies why your team exists. It defines your clients, your service, your relationship with your clients and the ideal future state of your team. The team purpose is the North Star that guides the team members to achieve identified goals.

#### Discussion points:

- a) Define who you serve.
- b) Define your services to your patients (quality, accessibility, the right service, to the right patient at the right time).
- c) Define your relationship with your patients.
- d) What impact do we wish to make for our patients, their families and the community at large?



### 2. Patient/Client/Community Centred Care

Practitioners from different professions seek out and value the input of the client in designing and implementing services.

#### Discussion points:

- a) What does patient and family centered care mean to us?
- b) What is our ideal relationship with our patients?
- c) How do we make patients and families partners in their care?
- d) How do we ensure they understand the information we are sharing with them?
- e) What are ways to encourage discussions?
- f) How do we include them in decision making?
- g) How do we ensure that appropriate education and support is provided to all involved in the patient's care?

### 3. Role Clarification

Everyone understands their own roles and the roles of others and uses this information appropriately to achieve patient outcomes.

#### Discussion points:

- a) Do you know your role? Do we understand, value and respect the diversity of all roles?
- b) Why is Role Clarity Important?
- c) Optional Activity:
  - In a group discussion format and in their own disciplines, have staff describe their role within the Collaborative Care Team to a new grad on a flip chart paper
  - Post the papers
  - Have each discipline view others role and ask questions for clarification or give comments
  - Compile role descriptions and get final approval from the team

### 4. Interprofessional Communication

Practitioners from different professions communicate with each other in a collaborative, responsive and responsible manner to enable interprofessional collaboration.

#### Discussion points:

- a) How would you define interprofessional communication and its purpose?
- b) What is acceptable communication within our team? What is unacceptable?
- c) What gets in the way of interprofessional communication within our team?
- d) What do we need to do to ensure that everyone has a common understanding of patient care decisions?
- e) How can we use information and communication to improve patient and family centered care?
- f) Do you believe our team practices full disclosure and transparency in all of our communication including with patients, families, all Collaborative Care Team members? How can we improve?
- g) What type of additional training would improve our team communication?



## 5. Team Functioning

Practitioners understand the principles of team work and group processes to allow for interprofessional practice.

### Discussion points:

- a) How do you think we function as a team now?
- b) What are our values as a team?
- c) What is our ideal relationship when working together to support these values and positive patient outcomes?
- d) What behaviors would negatively impact this ideal working relationship?
- e) How do we agree to work with other health practitioners to achieve desired patient outcomes?
- f) What can we put in place to regularly reflect on our effectiveness in working together as a team to achieve patient and family outcomes?

## 6. Collaborative Leadership

Practitioners understand and can apply leadership principles that support a collaborative practice model – shared decision making with individual accountability within your scope of practice.

*Practitioners support the choice of leader depending on the context of the situation. Leaders/practitioners assume shared responsibility for the process to achieve the best patient outcome.*

### Discussion points:

- a) What do you think Collaborative Leadership means?
- b) How would you describe a shared leadership model?
- c) What do we need to have Collaborative Leadership and shared decision making on our team?
- d) What conditions are necessary for trusting relationships? Where are we with trust?
- e) How will we collaboratively determine who will provide group leadership in any given situation to achieve best patient outcomes?



*What decision making processes can we put in place to ensure that we are making the best decisions for our patients?*

## 7. Interprofessional Conflict Resolution

Practitioners consistently address disagreements as they arise and address in a constructive manner.

### Discussion points:

- a) What value does conflict bring?
- b) What challenges does it bring?
- c) What are some common situations that can lead to disagreements or conflict?
- d) What processes do you suggest to manage disagreements as a team?
- e) When things really go sideways, what would you recommend?

## 8. Accountability and Sustainability Agreement

Team members discuss and agree how they will hold themselves accountable for the charter.

Team members agree on a plan to keep the Team Charter alive and relevant.

### Discussion points:

- a) Where do you want to keep the Team Charter so it is visible and accessible to the whole team?
- a) How will the team hold itself accountable for the terms of the charter that have been agreed upon?
- b) What will the process be if the charter is not followed?
- c) Who will be responsible for reviewing the charter with new team members?
- d) What process will we use for annual review of the charter?



