

# Team Charter Canvas | Office Transition Action Team (initial draft)

## Why this document

This is an alternative to the [S3 Delegation Canvas](#), which teams may use to establish their domain of responsibility and accountability and other agreements essential to guiding effective work.

By Nancy Cardin, John Willson, **Michael Strumberger**, etc.

Date, Version and Incremental Authors (reverse chronological order)	Changes
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Delegator<sup>1</sup>(s): **Dana Taylor, Executive Director**

## 1. Why does this team exist?

- This team exists because the Green Party of Canada (GPC) has become a remote-first operation, with its entire management team operating remotely, without considering how it needed to adapt to be able to work effectively.
- This team intends to learn from our experience of being remote-first, to identify any gaps of needs that are not currently being served, and intentionally plan and implement a remote-friendly or remote-first working culture and infrastructure for the Green Party of Canada.
- The team's objective is to ensure that all GPC stakeholders (i.e. initially staff, but ultimately also Caucus, Council, EDAs, regional structures, members and volunteers) are able to fully contribute, feeling equally valued, without barriers.

<sup>1</sup> A **delegator** is defined as the individual or group delegating responsibility for this domain (team or role) to other(s), i.e. to the delegatee(s).



## **2. How do we contribute to the organization's success?**

- By identifying and implementing tools that will help integrate remote staff in a way that overcomes inequity introduced by having colocated staff
- By identifying and updating processes and information that need to change to operate in an entirely virtual environment (esp. management of invoices and receipts)
- By making recommendations for new cultural norms that will help build a cohesive team, with shared values and purpose, despite being virtual

## **3. What are we accountable for?**

- Creating a description of what the Green Party of Canada's ideal working environment looks like, including the role of physical offices.
- Creating plans to progressively build towards that working environment, understanding that needs will evolve as progress takes place
- Proposing and launching 'experiments' of tools, processes and cultural practices to help shape GPC collaboration
- Building regular mechanisms to collect feedback on the working environment and how it can be improved

## **4. What are we not accountable for?**

- The team is not an "Employee Experience" team, and is not accountable for employee satisfaction or global stakeholder satisfaction.

## **5. What is our essential intent for the next 90 days?**

- Understand and map stakeholder perspectives and needs on possible office transitions
- Develop progressive plan to transition to a more remote-positive culture and workspace
- Implement experiments to create remote-friendly cultural and workspace change



## 6. How will we know if we've succeeded?

- Greater participation in working teams
- Higher satisfaction with work environment
- We will measure ourselves based on the following tracking questions (generally 0..5):
  - “Do you feel you have access to the tools you need to work effectively? (what would...)”
  - “Do you feel you are able to work well with your GPC teammates? (what would ...)”
  - “Is it easy to communicate effectively with your GPC teammates?”
  - “Do you feel safe and supported while working with your GPC teammate(s)?”
  - “Do you feel you can trust your GPC teammates?”
  - “Do you consider any of your GPC teammates to be your friends?”
  - “How many different GPC teams are you involved in, significantly?”
  - “How much time do you spend on GPC activities in an average week?”

## 7. What principles guide us?

- Equity - acknowledges that there are underserved and underrepresented populations and that **fairness is needed to assist equality in the provision of effective opportunities to all groups.**
- Equivalence ***Involve people in making and evolving decisions that affect them, so that you increase engagement and accountability, and make use of the distributed intelligence toward achieving and evolving your objectives.***
- Effectiveness ***Devote time only to what brings you closer towards achieving your organization's overall objectives, so that you can make the best use of your limited time, energy and resources***
- Continuous Improvement ***Regularly review the outcome of what you are doing, and then make incremental improvements to what you do and how you do it based on what you learn, so that you can adapt to changes when necessary, and maintain or improve effectiveness over time.***
- Accountability ***Respond when something is needed, do what you agreed to do, and accept your share of responsibility for the course of the organization, so that what needs doing gets done, nothing is overlooked and everyone does what they can to contribute toward the effectiveness and integrity of the organization.***

## 8. What will be prioritized for the next 30 days?

- Identification of all workplace environment stakeholders
- Survey (timing subject to support of Data Team)
  - Week 1 - Design of survey for staff's and/or key stakeholders' sentiments and recommendations regarding the need for physical offices and remote work, including setting baseline of tracking questions
  - Week 2 - Survey responses collected
  - Week 3 - Interpretation of responses
  - Week 4 - Presentation of responses to OTAT



- Processes - Documented master list of paper and online processes (esp. HR, Finance)
- Culture - Development of pro-remote work meeting practices and team-building activities
- Identification of different groups of stakeholders and their different needs
- Development of initial recommendations for office transition

## 9. What are the roles required to do this work?

### Team process and structure roles (ideally these rotate every 3 months)

- Facilitator - for holding space during meetings and keep things on track (training available)
- Coordinator - organizes and schedules meetings, prepares agenda, ensures all teams members have access to team tools like Chat, workflow management, etc.
- Record keeper - tracks team agreements (RC interested)
- Scribe - takes meeting notes, distributes to team, and tracks action items (possibly on team's Kanban board), ensures [shared folder](#) has relevant files
- Member communications, R.C. Maptio and X-Space - Onboarding, member inquiries, Google workspace Group Manager, and X-space updating

### Project roles

- Technology team - focuses on technological experiments
- Culture team - focus on cultural implications and opportunities
- Process team - focus on processes relevant to supporting intentional and effective remote working
- Survey team and data team liaison - focus on authoring survey and producing results
- Regional / geographic variability team - Provides regional/geographic lenses to core work
- Accessibility & equity team - Provides accessibility and equity lenses to core work

## 10. What roles will we each play?

- TBD

## 11. Are there any roles not yet claimed?

- TBD

## 12. What do we expect of one another?

- Discipline in our use of shared task management (eg. Kanban)
- Complying to agreements on how we communicate with each other (e.g. chat for chat, email for email)
- We make a space safe to raise tensions when work isn't in flow, asking for help, proposing changes



- Holding space with kindness and respect for what each person brings to the team

### **13. Who are our users or customers?**

- Staff and board
- Federal Council
- Action teams
- Caucus teams
- EDAs
- CWG
- Campaigns
- Members

### **14. What decision rights do we have?**

- Defining or changing internal processes
- Deploying new tools or technology
- Recommending new cultural norms (e.g. conduct)
- Experiments can incur expenses up to \$1,000, combined

### **15. What can we do without asking permission?**

- [not sure how this is different from above]

### **16. Within what guardrails do we have autonomy?**

- Need to have organization-wide changes approved by Executive Director

### **17. Are we responsible for anything that we don't control?**

- Flagging the Tech Audit project that the Data Action Team is proposing in partnership with Le Tech Team which has implications for this project as well

### **18. How will we make decisions?**

- A consent-based process with no minimum quorum.
- Maybe experiment with <https://www.murmur.com/>



## 19. What resources do we control?

- N/A

## 20. What is our meeting rhythm?

- Weekly ops meetings
- Monthly governance meetings
- Meeting agreements and guardrails
- Check-ins & closing retrospectives
- Working with a kanban board to keep track of shared workflow

## 21. How often will we conduct retrospectives?

- Quarterly for whole-project retrospectives
- Brief closing retrospective at the end of each meeting

## 22. What tools will we use to communicate and coordinate?

- Rocket.Chat channel for immediate feedback ([#office.transition.action.team](#))
- [transition.action.team@greenparty.ca](mailto:transition.action.team@greenparty.ca) Google Group for archived, threaded discussion
- Shared folder ([link](#))
- *Maptio* so our team is accurately reflected in this dynamic org chart

## 23. How will we share our work with one another and the organization?

- Keep our page on X-space up to date
- Ensure that key updates are included in any internal newsletters
- Work with other teams (Le Tech Team) seeking solutions like a wiki or *GitBook*

## 24. What are the learning metrics that will help us steer?

- ...



### 25. How will we know if we're making progress?

- Stakeholder tracking surveys?

### 26. Relevant resources

- [Action Team Rocket.Chat server](#) (Ask team for an account, channel #Office Transition Action Team)
- [Project planning Kanban](#)
- Office Transition Action Team Workspace [Shared Drive](#)

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