

# Hybrid Charter Checklist

Step-by-step guide for managers

Use this checklist to create a Hybrid Charter for your team. The aim is to outline and communicate how your team will work together most effectively in the future. Take each section in order. Involve the full team in creating the Hybrid Charter to ensure collective agreement

1. YOU AS A MANAGER

FIRST CONSIDER YOUR ROLE AND MANAGEMENT STYLE

- What are the company’s expectations around hybrid working? Consider any strategic guidelines which may have been set at a company level
- How much flexibility do you have as manager to set the expectations for your team?
- What works best for you to manage your team most effectively?
- What do you need to be a fully effective and supportive people manager?

3. YOUR TEAM MEMBERS

THIRD CONSIDER YOUR INDIVIDUAL TEAM MEMBERS

- (note: if you do not know the answers to these questions, feel free to ask your team members for their input)
- How do different individuals in your team prefer to work (how/where/when)?
  - What are your team members’ personal circumstances and wellbeing considerations?
  - Does anything constrain team members from working in the office?
  - Do any team members need more support (new joiners, struggling team members etc.)?

2. THE WORK ITSELF

SECOND CONSIDER THE WORK YOUR TEAM NEEDS TO DELIVER

- (note: if you do not know the answers to these questions, feel free to ask your team members for their input)
- What is the nature of the work of your team:
    - What activities are best done independently?
    - What activities require collaboration?
    - Who do team members collaborate with (other members of your team, or people outside your team)?
    - Do team members undertake similar roles or do their roles vary?
  - What value would the team gain from working in the office?
  - What issues arise from a lack of collaborative working?

4. AGREE THE HYBRID CHARTER WITH THE FULL TEAM

FINALLY DRAFT THE HYBRID CHARTER, THEN AGREE IT WITH THE FULL TEAM

- Draft your Hybrid Charter based on these inputs - set out how and when you suggest the team should work and communicate with each other
- Have a discussion with the team to agree it together – this is critical to ensure collective agreement
- Communicate the agreed Hybrid Charter so that everyone is clear and aligned
- Review the Hybrid Charter regularly to check that it still meets everyone's requirements



If you are considering a new performance management system or looking to change your existing one, talk to one of our experts.

Talk to an expert