

Team Charters

Creating a Team Charter is a critical step in ensuring the success of a team. Both the process of discussing the charter content and the actual document itself help foster efficiency and effectiveness. A charter is an open declaration of the team's purpose and scope of responsibilities and also how the team will function. It helps a team focus and avoid out-of-scope tangents. A charter is a sort of contract, but it is not a straight jacket. It does not have to conform to any format. It can and should be renegotiated periodically.

The following are typical areas covered in a Team Charter: (Note: "?"s" intentionally omitted to ease reading.)

- 1) Mission. What is the general purpose and intent of the group. Why does it exist. Typically this includes the strategic outcomes for the team. Sometimes this section states what is not the team mission and/or how the team differs from other groups in the organization. List formal name of team here.
- 2) Goals/Objectives. What is the team's focus. What outcomes is it responsible for. These should be measurable objectives so that the team will know when they have achieved them. These are long term goals and not a list of all the team's topics for discussion. Consider using a SMART format for goals.
- 3) Authority scope and limits. What can the team do and not do. What empowerments can the team exercise (and be held accountable for.) A team may make authority requests from it's sponsor. Scope of authority may change as a team develops skills and trust. What can the team create and approve. What tasks can it assign. Does the team have a budget, contracting, hiring/firing authority, etc.
- 4) Sponsor. Person or group team is responsible to. Who can address roadblocks, provide feedback, etc.
- 5) Membership. Who should be on the team to ensure it can achieve its objectives. If the team becomes too large, then subcommittees and/or advisory groups should be formed. A team may have core members and extended members who participate part time. However, when present, the extended members are equal to the core members in decision making. They are not guests or temporary advisors. List membership by name and/or title. Also cover how to handle changes in membership.
- 6) Resources and support. Often covered in other sections. List special budgets, training, advisors, etc.
- 7) Roles / authority within the team. Define the functions and authority of chairperson, facilitator, time keeper, recorder/scribe, and other roles the team needs, such as liaison with other teams. List authority, for example, to add an agenda item or cancel a meeting. If there is a team "leader," define the meaning.
- 8) Operating procedures / processes. This section outlines how the team will function.
 - Schedule. Basics of when, where, frequency of meeting. Notification if member cannot attend.
 - General method of discussion facilitation. Use of parliamentary procedure, for example would be listed here. Facilitator term, backup, rotation, use of outside facilitators, etc.
 - Formal documents and distribution. Agenda, nature of minutes, confidentiality, etc.
 - Ground Rules and how they will be administered. Outline facilitator authority and group agreements about handling violations of rules.
 - Decision making process. How will decisions be made? Consultative, vote, consensus... and what method to be used when these fail? Charters sometimes define "consensus" in the document.
 - Conflict resolution. What special procedures / ground rules will be followed when things get bogged down or when emotions rise or roadblocks appear. Be specific here or the Charter won't be useful.
 - Goal achievement measurement. How will the group monitor assignments and if reaching goals?
- 9) Interface with other teams. Special agreements / requirements in working with other groups.
- 10) Process Improvement. How will the team become self aware and continue to develop. Special steps, training, surveys, feedback, meeting evaluation, etc.
- 11) Appendixes. Put at the back anything that tends to change and/or is a supporting document.
- 12) Approval and signatures. Formal approvals and record of team member agreement.