Handbook

Team Charter

Version 3.0

Revision History

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Team Charter

# Introduction

## Purpose

The purpose of this handbook is to provide guidance for the development of a team charter.

The handbook is relevant to all teams in the organisation and therefore is relevant to all personnel.

## Scope

This handbook is focused on the development of a team charter; other aspects of project operations are not within its scope. The formation and operation of teams is covered in separate handbooks (see references).

## Definitions, Acronyms, and Abbreviations

Charter A guide that serves to focus and motivate a team in its pursuit of its goals and objectives

## References

PEM 110 HBK Working in Teams

PEM 111 HBK Integrated Product Teams

# Overview and Rationale

Multiple reasons exist for preparing a team charter.

All teams, large and small, work better if the members are united to a common purpose and everyone is clear about their roles and expectations. Having a name (and possibly a logo) and a mission statement helps build unity, while defining roles and ground rules lets everyone know where they stand minimizing the risk of conflict and facilitating task completion. A team member skills inventory helps identify the strengths and weaknesses of the members, which may save time in assigning and accomplishing group tasks. Setting goals and being aware of potential obstacles to their achievement — a skill central to the management process — encourages teams to develop contingency plans and take an active approach to problem identification and problem solving.  An essential element of a good proposal is conflict resolution mechanisms. Conflict cannot be—and probably should not be—completely avoided, but it can be managed and should be managed.  By identifying the likely kinds of issues that might bring team members into conflict and agreeing beforehand how to deal constructively with those conflicts, team members will help to ensure the optimum functioning of the team. One common conflict, for example, is the perception that one or more team members are not doing a fair share of the work.  This can be the result of unclear or conflicting expectations, or of an intentional or unavoidable failure to follow through on assignments or attendance.  Either way, by agreeing on the “rules of engagement” before conflicts even arise, teams can manage it more ably if they should arise.

# Content of a Team Charter

This section can be used as a template for your team charter and be updated throughout the duration of your project as needed. Include this document on your repository or add relevant sections of this template to create a page in your repository.

**Team Name**

## Team Mission and Objectives or Goals

* Begin with a one or two sentence statement of what the team is supposed to do – a statement of why your team exists
* What are you trying to accomplish in general terms?
* The specific goals and or outcomes that you are hoping to achieve over the life of the team. These include but are not limited to:
  + Objectives relating to task completion
  + Objectives relating to task quality
  + The development of specific team “process” skills
* Members should also identify barriers that may hinder goal attainment (e.g. work commitments, not understanding the work required, failing to adhere to ground rules, etc)
* These goals and objectives need not be limited to the course project e.g. you may want to help each other prepare for unrelated tasks

**Team Member Skill Inventory**

* Team members can identify for the others what they think they bring to the team in terms of the task and team maintenance roles they can fulfill.
* You can also identify any skills or knowledge areas they would like to work on during the team process and to solicit the help of others.

## Role Identification

What are the different roles that members of the team will take on to support its success? These can be permanently assigned or rotate. Examples include:

* *Leader*
* *Chairperson*

### Facilitator

* *Scribe/Secretary*
* *Communications coordinator*
* *Resource person/Technical support*
* *Editor*
* *Reviewer*

## Ground Rules

These are the basic values and operating principles and procedures that will govern your life as a team. They may include such things as:

* Work tasks
  + Assigning responsibilities
  + Setting deadlines
  + Meeting deadlines
  + Quality of work
* Meetings
  + Attendance Expectations
  + Schedules/times
  + Locations
  + Coming Prepared
  + Protocol
  + Agendas
  + Notifications
  + Record keeping
* Attitude
* Contacting
  + Method (email, phone, on-line etc.)
  + Limits
* What will serve as acceptable excuses
* Penalties
* How will you maintain configuration control over your work?
* How will decisions be made within the group?

**Conflict Resolution Mechanisms**

* What are potential sources of conflict and how will you deal with them?
* e.g. All problems will be kept within the group until that is no longer a solution and then we must escalate the issue.

## Preliminary Project Plan

Once the foundation for a successful team has been laid, team members can then begin to plan for the accomplishment of its course project by working on a preliminary project plan. The project plan can ber included in the project overview or duplicated also here in the Project Charter. This should include things such as:

* identification of tasks or processes
* member assignments
* due dates

**Performance criteria**

Five performance Criteria with descriptions must be prepared and included in the charter.

**Team Member Sign Off:**

I have participated in the development or review of this charter and agree to it.

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Industry party: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Seminar tutor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: