

Team Charter Development Template

Introduction to the Team Charter

- **Purpose of the Charter:** Briefly describe the purpose of creating a Team Charter and its importance in setting the foundation for team success.

1. Mission and Vision Statement

- **Mission Statement (Objective):** What are the immediate goals of the team?
 - **Instructions:** Write a concise statement that summarizes the primary objectives and how these contribute to the broader organizational goals.
- **Vision Statement (Aspiration):** What is the long-term aspiration of the team?
 - **Instructions:** Craft a statement that provides a compelling picture of the future where the team's contributions have made a significant impact.

2. Team Composition and Leadership

- **Team Roles and Responsibilities:**
 - **Instructions:** List the roles by function and describe the key responsibilities and skills required for each.
- **Leadership and Sponsorship:**
 - **Instructions:** Outline the support structure provided by leadership, including resource allocation and decision-making authority.
- **Escalation Path:**
 - **Instructions:** Provide a clear escalation path for resolving issues that exceed the team's authority.

3. Operational Duties

- **Process Management:**
 - **Instructions:** Specify which team members are responsible for particular processes and the methodologies (e.g., Agile, Lean) to be used.

4. Scope of Work

- **Included and Excluded Tasks:**
 - **Instructions:** Define what tasks and projects the team will handle and what is explicitly out of scope.

5. Accountability Metrics

- **Performance Metrics:**
 - **Instructions:** Identify key performance indicators (KPIs) that link to both individual performance and team objectives. Schedule regular reviews.

6. Core Values and Conduct

- **Ethical Guidelines and Behavior Standards:**
 - **Instructions:** Write a code of ethics that includes expectations for communication, conflict resolution, and collaboration.

7. Communication Protocols

- **Communication Methods:**
 - **Instructions:** Detail the preferred tools and methods for different types of communication within the team, to leadership, and external parties.

8. Feedback and Continuous Improvement

- **Feedback Mechanisms:**
 - **Instructions:** Establish methods for collecting and implementing feedback from team members and stakeholders.

9. Completion and Implementation

- **Final Review and Approval:**
 - **Instructions:** Once all sections are completed, review the Charter with your team and management for feedback and make necessary adjustments.
- **Adoption:**
 - **Instructions:** Officially adopt the Charter and communicate its contents to all team members. Schedule periodic reviews to ensure it remains relevant and effective.

Tips for New Managers

- **Engage Your Team:** Involve team members in the drafting process to foster buy-in and gather diverse perspectives.
- **Keep It Flexible:** Remember that the Team Charter is a living document. Be prepared to make adjustments as your team evolves.
- **Focus on Practicality:** While thorough, ensure the Charter remains practical and concise to avoid overwhelming the team with bureaucracy.