

Team Charter

At the beginning of a team's lifecycle it is imperative that team members work together to develop a written statement of objectives and practices that will help to ensure team alignment. Research shows that the best teams invest a tremendous amount of time and effort exploring, shaping and agreeing on a purpose that belongs to them collectively and individually. In contrast, failed teams rarely develop a common purpose. The best teams also translate their common purpose into specific performance goals (Katzenbach & Smith, 1993).

Team charters are contracts. As such each team member should be held accountable to all of the items outlined in the contract. The charter should be considered a "living" document. Therefore, the charter is subject to changes and modifications based on the needs of the team. Teams should plan to review the charter periodically to make appropriate revisions.

Simply, a team charter outlines the, "What, How, and Who" for the team. *What* are we as a team trying to accomplish? *How* are we going to achieve our goals? *Who* is responsible for various tasks?

More specifically, a team charter should include the following key elements:

1. A clear statement of the team's goal(s). In other words, a delineation of the mission and purpose of the team.
2. The way that the team will operate to accomplish the mission. For example, how will team members communicate? How will decisions be made by the team? How will conflicts be resolved?
3. An outline of specific roles and responsibilities. Note: Some roles, like team scribe/secretary, might rotate.
4. Specification of norms that the team will adhere to and the culture that the team is trying to create.
5. How people will be held accountable for their behaviors? What are the rewards and benefits for strong performance, as well as consequences for failure to adhere to the contract? How will people be given feedback to improve performance?

Adapted from:

1. Kellogg Teams and Group Center –"Team Contract Exercise" by Leigh Thompson and Deborah Gruenfeld
2. Mathieu, J.E. & Rapp, T.L. (2009). Laying the Foundation for Successful Team Performance Trajectories: The roles of team charters and performance strategies. *Journal of Applied Psychology, 94*(1), 90-103.

Guidelines for Writing a Team Charter

Part 1:

Individual Preparation

Each team member should complete a User Manual

Part 2:

Group Meeting

1. Team members meet and share individual information from part one.
2. The team discusses its goal and mission.
3. The team determines how it will operate and what norms will be established. For example, norms and expectations should be set around, meeting attendance, participation and contribution to the team, work quality, etc.
4. An outline of specific roles and responsibilities. Note: Some roles, like team scribe/secretary, might rotate.
5. The team determines how individuals will be held accountable and how developmental and performance feedback will be provided to team members.

Team Charter Sample Template

Team Mission/Purpose/Goal(s):

Team Operation:

Processes:

What procedures, practices, and methodologies will the team use to accomplish its mission? (E.g. communication mediums, decision processes, technology? Project timeline and changes, tracking progress)

Expectations:

What behavioral norms do we expect? (E.g. How will we facilitate trust, collegiality, *etc.*

Roles & Responsibilities:¹

(Roles to consider: Implementer, Completer, Coordinator, External Networker, Relationship Builder, Evaluator, Researcher, Devil's Advocate, Meeting Manager, Knowledge Manager, Project Manager)

¹ *It is likely that team members will assume multiple roles*

Rewards, Sanctions & Feedback:

How will people be held accountable? What are the consequences for failing to adhere to the charter? What rewards will people receive for their performance and contributions?

How can we instill a culture of feedback to ensure everyone's development?

Team Member Signature _____

Team Member Signature _____

Team Member Signature _____

Team Member Signature _____

Team Member Signature _____