Title:
Creating Successful Team Charters

Word Count:
899

Summary:
Do you have a team that is frustrated, not making progress, or unclear about expectations?  There is one single thing that can alleviate or eliminate these challenges and get the team off to a solid start…a team charter.

Keywords:
team building, team charters, team success, project team, work team, teams, planning, starting teams, team agreements

Article Body:
How many times have you been on, or heard about a team that got frustrated?  Or felt like they weren't making progress?  Or weren't completely clear on what they were expected to do?  Or didn't feel like they had support from those above them?

If you are like me and most people I know, you are nodding yes to one or more of the questions above.

There is one single thing that can alleviate or eliminate these challenges and get the team off to a solid start. That single thing is a team charter.

What is a Team Charter?

A charter is a document that describes the purpose, boundaries and agreements of the team (the details are below).  It is co-created by whoever is sponsoring or forming the team and by those who will be on the team.  The power of this document comes from the conversation and agreements that are recorded on it.

Because the power comes from the agreements that are reached, the format of the document itself is less important than the conversation.  Whatever the format, the components in the next section should be considered.

What is Included?

Team charters should address the following areas and answer the related

questions.

• Purpose and Alignment. Why is this team being formed? What purpose will it serve? What challenge, problem, issue or opportunity will it address? How is the work of this team in alignment with the larger goals and strategies of the organization?

• Goals and Expectations. What are the specific goals for this team? When will we know we have completed their work? Who are Customers and Stakeholders of the team's work? What are their needs and expectations? What are the obstacles or challenges that can be seen at the start? Make sure to state the goals clearly with measurable outcomes and timelines.

• Roles. Who is the team leader? What is their role? Who is responsible for facilitation, logistics, and information management? Who will be responsible for communication to stakeholders and the team sponsor? How will each person be involved in decision making?

• Approach. How and when will the team meet? What are the norms or ground rules that the team will agree to? How we make decisions? How will we hold each other accountable for these things and for task completion? Who will communicate team progress and to whom? Your charter should also include a high level look at the major phases or milestones in the life of the team and outline those.

• Skills and expertise required. Make a listing of the skills and expertise that will be required for team success. Identify the individual on the team that can provide those skills and perspectives. Identify any gaps in skills and determine a way to attach those skills to the team through other resources. Adding these skills doesn't mean you have to add people to the team. It means that subject matter experts can best be identified and invited to participate in the beginning and a charter helps make that happen.

• Resources needed. What budget of time and money will be needed for this project? What other resources will be required?

• Authority. What level of authority on spending does the team have? What authority do they have for other resources? What approvals will be required and by who?

• Agreement. Once all of these questions and items have been documented, your charter should be signed by the team sponsor and each team member. This will cement the agreement and make it easier to hold people accountable. It

also ensures that every team member understands and is on board with the complete charter.

How do I Implement a Team Charter?

Because there is some structure required, typically a leader who is forming or sponsoring a team would initiate the process.  If this doesn't happen in your organization don't use that as an excuse!  Whatever your role you can gain support for having a conversation that leads you to the clarity and agreements that a charter will provide.

Get the team together along with the leader who formed and/or is sponsoring your team.  Have a conversation about the eight items above, documenting your agreements.  You may be able to finalize a charter in one meeting, or it might require people to gather more information before finishing - do what makes sense given the size, complexity and importance of the team's output.  Remember all time invested here will be repaid many times.  Resist the urge and tendency to "get this done and get on with the work."

Once the document is created, have all parties sign it as a way to signify commitment to each other.  Then keep the document fresh by referring to it in team meetings and making sure that you stay on-track with the boundaries and guidance it provides.  Recognize too that as time moves forward you may need to make adjustments, clarifications or changes to the charter.  This is perfectly fine as long as all team members and the leader and sponsor are in agreement and "sign on" to the changes.

Be Forewarned

Will creating a team charter take time?

Absolutely.

Will some people want to stop talking and get started?

For sure.

Recognize these facts but remember an even bigger one – time spent collaboratively building a charter will be repaid in reduced frustration, improved productivity and better results.