



## Team Charter

A Team Charter is a document developed to capture the reasons why a team is established, expectations for the team, and their responsibility and authority. While some general guidance may come from the person or organization that creates the team, the team gains considerably by developing the "meat and potatoes" of the charter itself. Participating in development of the team charter helps team members clearly understand what their purpose is, what processes and procedures they will use, and often translates into increased commitment by all team members because of the ownership they feel for the product.

**Team Purpose:** The purpose captures the reason the team exists and what it was created to accomplish. Although the purpose may seem intuitively obvious, it's often misunderstood or misinterpreted. Team members should clearly define the purpose in their own words, to ensure they all clearly understand and agree on what they are trying to accomplish, while creating a strong sense of ownership of that intent.

**Authority/Sponsor/Lifespan:** Insert under whose authority the team charter was developed, the name of the sponsor (if different from the authority), and how long the charter is in effect.

**Goals and Objectives:** Goals and objectives provide the intermediate steps necessary to fulfill the team's intended purpose. They help team members focus on accomplishing tasks that will lead to successful product delivery. Some people use the terms "goals" and "objectives" interchangeably, but from the perspective of organizational or strategic direction, they are actually different. The goals identify what the team is trying to achieve and are more general and long term in nature. Objectives are more specific and short term in nature. Objectives translate goals into daily action through work processes and activities that lead to the delivery of products and/or services. Generally, a goal has one or more objectives. The important thing is that team members know and understand the steps they need to achieve along the way toward completing their final product.

Goals and objectives may be product-related (e.g., budgeted cost, life cycle cost, schedule, performance), process-related (e.g., team meeting effectiveness, action item tracking), performance related (e.g., team communication, conflict resolution, individual contribution), or some combination thereof.

The acronym SMART is useful when creating goals and objectives.

- **Specific.** Clearly describe what you want accomplished.
- **Measurable.** Something that ideally not only tells you whether the goal/objective has been achieved but also allows you to determine your progress toward achieving the goal before it is successfully achieved. Quantifiable measures are good and usually preferred, but qualitative goals/objectives may be appropriate in some cases.
- **Achievable.** Under normal circumstances, team members should be capable of achieving their goals/objectives without being overly challenged. Some teams may prefer to set goals and objectives that slightly stretch team members; in other words, challenge them to do more than what they believe they can achieve under normal circumstances. Typically a stretch goal or objective is one you have about a 70 to 90 percent chance of attaining.
- **Relevant.** Goals and objectives should add value and directly contribute to the purpose and tasking of the team.
- **Timely.** Setting a time frame (or deadline) for meeting the goal or objective helps provide a sense of urgency in achieving it.



Goals and objectives should not be confused with tasks or work activities. A task is work that must be completed. For example, to analyze an integrated master schedule, evaluate engine manufacturers, or develop a bottom up cost estimate; these are all tasks, not objectives. A goal or objective is concerned with how well that task is performed.

**Team Expectations:** Most effective teams establish operating agreements or ground rules. These are agreed-upon guidelines or norms for individual and team behavior that describe how the team members will interact with one another, what processes they will use, how they will make decisions, and what they expect of one another. They can be very effective in helping the team manage conflict and capitalize on diversity of ideas, skills, and experience, instead of being dragged down by them. For expectations to be effective, they must become part of a team's culture and enforced by all team members, not just the team leader. Team expectations that are not enforced have no meaning and erode trust and commitment to excellence.

#### **Approach and Commitment to Best Practice:**

**Roles and Responsibilities:** Team roles and responsibilities should be agreed upon and assigned to specific individuals. Some roles may be shared and/or rotated periodically. The point is for the whole team to be clear on who does and is responsible for what.

All teams will have a Team Leader (primary leadership responsibility for the team; the link to the next higher level in the program). Note: For most teams, the leader will be designated by the person or organization who establishes the team; but in some cases, the leader may be chosen by the team membership.

Other roles and responsibilities will vary depending on the work and makeup of the team. When assigning roles, each individual's training, experience, capabilities, and workload should be considered. Teams should aim to balance the workload of team members, which doesn't mean "exactly equal," since some members may be assigned full time, while others may be assigned to more than one team.

A simple but important example of roles is in meetings. At each meeting there should be a designated:

- Facilitator (keeps the team focused on the topic and operating within its ground rules)
- Timekeeper (keeps the team aware of where progress in relation to the agenda)
- Recorder (keeps and distributes minutes of team meetings)

Having these roles clearly laid out—and responsibilities executed well—keeps the team on track and leverages precious time and attention.

**Stakeholders and Spanning Boundaries:** Teams regularly work with many stakeholders to accomplish their work and span multiple boundaries of organizational structures, functions and disciplines. It is wise to prepare well for this and to be clear about who owns what aspects of the process. You may want to assign particular point people who will reach out regularly to keep lines of communication open and information flowing freely. It is also important to understand the needs and interests of your various stakeholders in order to build strong relationships and trust. When this happens, everything happens faster and more smoothly and it's easier to accomplish your goals and objectives.

**Revision of the Charter:** It is important to revisit a team charter periodically to make sure it is still relevant and useful and equally important to make clear up front how often this will be done. This is a living document, and it shouldn't just sit in a file somewhere. The team leader, or other appointee, should add charter revision to their work calendar and schedule a whole-team session well in advance.



**Approval:** A team charter is only valuable when everyone owns its content and commits to operating in alignment within the guidelines it provides. If the charter is co-created by the whole team—as is should be—then each member should feel proud to sign their name as proof of their commitment.



<b>TEAM CHARTER</b>	
<b>Team Name:</b>	
<b>Team Purpose</b>	<b>Authority/Sponsor/Lifespan</b>
Consider: Why does this team exist? Why do we need this team in the first place? What uniquely defines this team and its composition?	Through what authority (law, policy, regulation, standard, guidance, requirements, memorandum, etc.) or sponsorship is this team established? Also, what authorities relative to this team are either undefined or missing that will need to be corrected? When does the team start and finish (dates)? Note: The team's CTA should be updated after major milestones or deliverables and/or significant changes in tasking
<b>Goals and Objectives</b>	
A critical section! Start with objectives that help drive you towards a holistic solution. In this section, list the specific outcome(s) the team is expected to achieve. Ask yourselves: When our team creates what it is intended to create, what will that look like? How will we know? Take the requisite time to derive objectives holistically before determining specific goals that support them.	
<b>Team Expectations (Acceptable Habits and Behaviors)</b>	
<p>Before you get going, take the time to make sure your team is prepared for potentially challenging conversations and circumstances. The soft stuff is the truly hard stuff, and proper attention to the soft elements (i.e. people and working relationship dynamics) creates a powerful team atmosphere where members actually look forward to coming to work and voluntarily donate their discretionary energy to the team. Here are some things to consider:</p> <ol style="list-style-type: none"> <li>1. How will your team establish and maintain mutual trust among the members?</li> <li>2. How will you stay outcome (versus problem) focused?</li> <li>3. Teams create opportunities for hierarchy: how will you use yours? Sparingly? Often?</li> <li>4. There will invariably be a diversity of viewpoints, which is a good thing. How will you be respectful of others' views?</li> <li>5. How will you balance action and inquiry? There are times for both, especially the latter.</li> <li>6. How will your team promote the challenging of assumptions on an individual and group level?</li> <li>7. What does it look like on your team to assume innocent intent of others?</li> <li>8. What simple rules will govern the conduct of team meetings? Think especially in terms of simple rules that reinforce your team's rules of engagement</li> <li>9. How will you hold each other accountable when it comes to delivering on promises and/or adhering to team rules of engagement?</li> <li>10. How will conflicts be resolved?</li> <li>11. What habits &amp; behaviors will we see in ourselves and customers?</li> <li>12. What structure is needed to support those behaviors?</li> <li>13. What results will materialize?</li> </ol>	
<b>Approach and Commitment to Best Practice</b>	
What will be your overall strategies to meet goals and realize your desired outcome(s)? Start by comparing a picture of where you are now with where you want to go and decide what needs to be kept, abandoned, invented or reinvented to get there (KAIR). Summarize the results in the charter. Then, as a team, commit to	



**TEAM CHARTER**

follow-through by leveraging best practices in project management. For example, you might consider the following: An Integrated Master Plan (IMP) sets up your decision architecture at any level of leadership (agency down to working group) by aligning decision points with specific, measurable success criteria to determine what “done” looks like. Will the team develop a Work Breakdown Structure (WBS) with a dictionary for work products? Will a Responsibility Assignment Matrix (RAM) follow to identify sub-teams? Will the team develop an integrated master schedule (IMS)? How will you determine cost/budget? None of these elements has to be fancy or complicated, yet each offers an approach to ask critical questions of your effort that ought to be considered.

**Roles, Responsibilities, and Internal Team Governance**

In this section you should summarize the key aspects of roles, responsibilities, accountability and authority within your team. Will the team have a leader assigned, or will the team pick the leader? Is the team supporting an accountable individual or is the team accountable? Do team members represent their home organizations as accountable members or do they need to coordinate with accountable individuals?

Team Members (names)	Represent (organizations)	Authority (specific role on the team)

**External “Team of Teams” Governance**

No team operates in isolation. Decisions are not made in a vacuum. This section addresses all stakeholders: the known, key external interfaces with this team. This is also a good place to identify external interfaces that currently do not exist but should.

**Revision of the Charter**

The team agrees to revisit this charter, and amend as necessary, every \_\_\_\_\_ months beginning:  
 Date: \_\_\_\_\_

**APPROVAL**

Every team member must buy into this CTA and nothing says that better than a signature on paper. Add more lines if you need to.

[Team Member Signature] \_\_\_\_\_ [Team member organizational sponsor  
 Signature] \_\_\_\_\_

[Team Member Signature] \_\_\_\_\_ [Team member organizational sponsor  
 Signature] \_\_\_\_\_