

## TEAM CHARTER GUIDELINES

### Team Purpose:

The purpose should be stated using action verbs such as: develop, recommend, implement, analyze, define, execute, document, etc.

*Wrong: The team's purpose is to manage the rollout of the new software.*

*Right: The team's purpose is to develop a rollout plan for the new software and implement that plan.*

### Expected Results/Outcomes:

Outcomes should be SMART. Begin by identifying the result area (what will be measured), then document what standard is required for success (measure) and the target date.

*Wrong:*

| Result Area  | Measure                            | Target Date                       |
|--------------|------------------------------------|-----------------------------------|
| Rollout Plan | Complete plan approved by sponsor. | Plan approved by January 15, 2005 |

*Right:*

| Result Area  | Measure                                                                                                                                                                                                                       | Target Date                       |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Rollout Plan | Plan includes time line, accountability for each task, frequent and regular communication with all stakeholders, consideration for scheduled company events and holidays, and is approved by team sponsor with minor changes. | Plan approved by January 15, 2005 |

### Decision Boundaries:

Identify the areas of decisions that will be considered by the team. Policy decisions are about company procedures and rules. Action decisions are about work that gets done. Resource decisions are about how money is spent or time is used. Indicate their role in that decision as one of the following: Make decision, Make recommendation, Provide input.

*Wrong:*

| Decision Area               | Authority                                             |
|-----------------------------|-------------------------------------------------------|
| Rollout plan                | Develop rollout plan with time line                   |
| End User Communication text | Create 5 communication documents about the transition |

*Right:*

| Decision Area                                  | Authority           |
|------------------------------------------------|---------------------|
| Rollout plan                                   | Make recommendation |
| End User Communication text                    | Make decision       |
| Identification of accountability for each task | Make decision       |

## TEAM CHARTER GUIDELINES (CONTINUED)

### **Milestones:**

This section should be completed by the Team Sponsor, giving guidance to the team about any key dates they should consider as they create a plan for meeting their Charter. It should include both the milestone to reach and the date that milestone is expected. Note: These milestones are not the same as outcomes. They are instead the actions required by the team to meet the deliverables for the outcomes.

*Wrong:*

| Action                                                  | Target Date        |
|---------------------------------------------------------|--------------------|
| <i>All users transitioned</i>                           | <i>June 2006</i>   |
| <i>Work process reduced by 2 days due to transition</i> | <i>August 2006</i> |

*Right:*

| Action                                                         | Target Date            |
|----------------------------------------------------------------|------------------------|
| <i>Implementation draft to Sponsor</i>                         | <i>January 5, 2006</i> |
| <i>All software loaded and upgraded on all computers</i>       | <i>April 15, 2006</i>  |
| <i>All old versions of software removed from all computers</i> | <i>June 1, 2006</i>    |

### **Constraints:**

Indicate the specific constraints that should be considered by the team as they fulfill their Team Charter.

*Wrong:*

- *Budget*
- *Training Resources and Length*

*Right:*

- *Total budget for implementation (not including cost of software) must not exceed \$7,000.*
- *Training must be developed and delivered with internal resources.*
- *Formal training time per employee may not exceed 2 hours.*

### **Team Profile:**

Information should be captured in all three categories. It is not critical that an item be in the "right" category, as long as it is recorded somewhere. Technical skills are teachable and include: time management, project management, written communication, presentation skills, attention to detail, leadership, etc. Attributes tend to be less teachable and reflect the innate values a person holds that drive their work ethic, for example, risk taker, optimist, team player, ethical, caring, etc.

### **Management Support:**

This section will most likely be completed by the team as they discuss the challenges they expect in implementing their charter. Support actions should be very specific so that it is clear to all whether the support requested is actually provided.

*Wrong:*

*Support of team members' managers to participate on the team.*

*Right:*

*Managers commit to allow team members 2 hours per week to attend team meetings and complete team work.*

# TEAM CHARTER TEMPLATE

**Team Purpose:**

*This team's purpose is to*

**Expected Results/Outcomes:**

| Result Area | Measure | Target Date |
|-------------|---------|-------------|
|             |         |             |
|             |         |             |
|             |         |             |
|             |         |             |

**Decision Boundaries:**

The following decisions will be addressed by the team:

*Policy Decisions:*

| Decision Area | Authority (Team's role in decision) |
|---------------|-------------------------------------|
|               |                                     |
|               |                                     |
|               |                                     |
|               |                                     |

*Action Decisions:*

| Decision Area | Authority (Team's role in decision) |
|---------------|-------------------------------------|
|               |                                     |
|               |                                     |
|               |                                     |
|               |                                     |

*Resource Decisions:*

| Decision Area | Authority (Team's role in decision) |
|---------------|-------------------------------------|
|               |                                     |
|               |                                     |
|               |                                     |
|               |                                     |

*The team will not address these decisions:*

- 

The team should consider these factors when evaluating options and making decisions:

-

**Milestones:**

The team should create a project plan that meets these key dates:

| Action | Target Date |
|--------|-------------|
|        |             |
|        |             |
|        |             |
|        |             |

**Constraints:**

The team should consider these constraints and/or barriers when developing a project plan: (time, budget, etc.)

- 

**Team Profile:**

Project team members will be selected based on the following criteria:

| Technical Skills Needed | Departments Needed | Attributes Needed |
|-------------------------|--------------------|-------------------|
| •                       | •                  | •                 |

**Stakeholders:**

The following individuals and groups have a stake in the success of this project:

| <u>Stakeholder</u>                                                                    | <u>Name of Individual or Group</u> |
|---------------------------------------------------------------------------------------|------------------------------------|
| Project Sponsor                                                                       |                                    |
| Team Leader(s)                                                                        |                                    |
| Team Members (# members)                                                              |                                    |
| Internal Suppliers (staff or departments who will provide resources or information)   |                                    |
| Internal Customers (staff or departments to whom we provide resources or information) |                                    |
| External Suppliers                                                                    |                                    |
| External Customers                                                                    |                                    |

**Management Support:**

Managers and leaders will need to provide the team with support in these ways:

-

**Communication and Reporting Expectations:**

The team will be expected to communicate progress and results:

| Communicate to... | Frequency | Method (email, presentation, etc.) | Content (what information) |
|-------------------|-----------|------------------------------------|----------------------------|
|                   |           |                                    |                            |
|                   |           |                                    |                            |
|                   |           |                                    |                            |
|                   |           |                                    |                            |
|                   |           |                                    |                            |
|                   |           |                                    |                            |

**Charter Checklist:**

- ✓ Is the team's purpose clearly defined?
- ✓ Are all Outcomes SMART? (Specific, measurable, achievable, realistic, time limited) It should be clear to all when the Outcome is achieved.
- ✓ Is the team authorized and empowered to achieve the Outcomes?