

TEAM CHARTERS

The purpose of this tool is to guide you through the thought process necessary to write a charter for your team. A team charter typically consists of the following elements:

- **Purpose statement:** A brief statement of why the team exists and what it aims to achieve.
- **Team ground rules:** Brief statements of how the team wants to work together and what types of behaviors are desired.
- **Decision-making authority:** A brief summation of the team's decision-making authority in the context of the greater organization.

I. Team Purpose

Most organizations develop mission statements that communicate their purpose both to their employees and to the outside world. Similarly, teams or committees should also develop purpose statements that communicate their essential purpose and aim. While not as far-reaching as an organization's mission, a team's charter will help it focus and prioritize its work. The purpose statement should also help team members see the greater purpose they serve – and even inspire them!

Here are some examples:

- "Our team's purpose is to create innovative tools for translating data into valuable information accessible to anyone in our company."
- "Our team aims to create highly satisfied customers by continually re-inventing the in-store experience."
- "Our team's purpose is it to facilitate the professional growth of people within our company."

II. Ground Rules

Here are some examples that you can use to guide the development of your team's ground rules.

1. Be on time (meetings will start and end on time).
2. Keep discussions focused (if you're not clear what the focus is, ask for clarification).
3. Participate fully – look, act, and be interested.
4. One speaker at a time – avoid side bar discussions.
5. Bring all issues to the table – avoid "back room" discussions.
6. Use the "parking lot" for important but tangential topics.
7. Tackle issues, not people.
8. Manage your "airtime."
9. Identify and question assumptions.
10. Explain the reasoning leading to your conclusions.

III. Decision Making Authority

The final important element of the team charter is defining the team's decision-making responsibilities, both within the team and in the broader context of the organization. Typically, a team develops recommendations that someone higher up in the organization must approve. But, sometimes, the team has final decision-making authority. See the following examples:

- The authority of the marketing team is to advise the senior vice president of marketing. The team develops a variety of recommendations for her to consider.
- The decision-making authority of the Finance Committee is advisory to the Board of Directors. The committee recommends the annual budget for board approval and provides quarterly financial updates at regularly scheduled board meeting.

IV. Example

Putting these elements together, here is an example of a complete team charter:

Health Care Team Charter

Purpose: The purpose of our team is to identify and document the major tasks and decisions that need to be addressed in the next three years so that California successfully implements the requirements of federal health care reform. Specifically, our team will:

- Catalyze a process that institutionalizes cross-department planning;
- Build the knowledge and capacity to provide continuity for the next Administration;
- Identify the key policy issues that must be addressed or that present an opportunity for consideration – and use them as a jumping-off point for further analysis;
- Provide documents that incoming leaders can use to understand the top priority issues to be addressed and considered in the next three years.

Ground rules:

- Be on time (meetings will start and end on time)
- Consistent attendance is expected (no substitutes)
- Come prepared (complete all reading and homework assignments)

Decision-making authority: The team will identify and frame important planning and policy decisions for the new administration. Its purpose is not to make those decisions.

Note: Team charters can include other details. For example, some charters include a timetable for completing the team's tasks or a list of team members. You should feel free to modify your team's charter in whatever ways you think help bring clarity and definition to its work.