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How to Develop a Team Charter

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Introduction

This manual is provided to guide newly forming self-directed/high performing work teams of University of Missouri Extension in developing a group framework. You are invited to follow this self-paced guidebook as you chart a course toward your team's success.

The following sections give explanations and examples of the sections of a charter. This reference is organized in 9 sections: Purpose, Stakeholders, Membership, Responsibility, Decision Making, Team Name, Life Expectancy, Communication, and Financial Resources.

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Elements of a Team Charter

What is a charter?

A charter is a guideline that helps Extension's team members understand the purpose and function of any team. A charter is similar to a job description for an entire team. It provides structure for how a team operates, who its members are and what responsibility the team has to the organization, to the team and to each other. Regardless of the size, duration, and purpose of a team, a charter will be helpful for team focus and productivity.

What a charter is not...

A charter is not intended to define the work style, plan, rules or a process for a team. Each team needs to establish these parameters for themselves.

Why use a charter?

Using a charter will guide your team toward meeting its goals, but this is only part of the benefit a charter will bring to you! A charter will help others in the organization to understand the purpose of your team. Why is this important? The more aware others are of your team's function, the more supportive they will be of your work. It may increase your team membership and involvement of team members, as well as commitment from others in your organization to support your goals. Ultimately, a clearly defined and communicated charter will provide a solid foundation for your success!

What to include?

Your charter may include a number of sections which will point you in the right direction for achieving your goals. Here are some things to consider as you begin to chart your course:

Purpose

It is important for a team to have a shared sense of purpose. A clearly defined sense of purpose will help your team focus on its mission and goals and will, therefore, help in your teams' success. Your team will understand how it fits into the overall work of our organization. Also, team members will be clear on their roles in the team. This shared purpose will create a sense of ownership and commitment to the team as well as the organization.

To help you think about your purpose, these questions might stimulate ideas and key elements of a purpose.

- *What is the overall purpose of the team? What is its role in the organization?*
- *What are the expectations, services and outcomes that the team will provide for?*
Missouri Extension?

Stakeholders

A stakeholder is any person who has a direct impact or is impacted by the decisions and outcomes of the team. This may include Extension staff and/or administration, other

University department staff, team members, customers, and community advisory group members. Stakeholders can facilitate, implement, stall and/or block decisions made by the team. Therefore, it is important to identify your stakeholders and include them in your decision-making and communication process.

Consider these questions to help identify your stakeholders:

- *Who can implement or block decisions of this team?*
- *Who is affected by the outcome? (Be as specific as possible)*
- *Who has information or expertise that can help the team?*
- *Is there a specific person or smaller group of people to whom your team is accountable?*

Membership

Define team members and their roles. Consider the skills that are needed as well as the experience that each team member can contribute to the team.

- *Who makes up the team? Is it cross-functional?*
- *What skills/competencies are needed?*
- *Who will be the team leader(s)?*
- *Membership term/replacement process?*
- *How many team members?*
- *How can a team member leave the team?*

Responsibility

The team has a responsibility to produce and meet organizational needs and expectations. This requires a willingness and commitment by all team members to accomplish the established goals. How is responsibility accounted for by your team? What does responsibility mean to your team? What is each team member's responsibility to the team and to other team members?

- *What specifically is the team responsible for?*
- *What is each team member responsible for?*
- *How is the team's success measured?*
- *What are your Ground Rules for working together as a team?*
- *How will you replace non-functioning members?*

Decision Making

The team needs to identify the process (es) by which it will make decisions.

- *What is this team's primary decision-making process?*
- *What is the fall back decision making process?*
- *Are there obligations of team members to each other once a team decision is made?*

Team Name

Identify a team name reflective of your team's purpose. This will help build team unity as well as communicate the function of the team to others.

- *Choose a word or phrase which represents the spirit of your team!*

Hint: When choosing a team name, remember to pick something that others in the organization will remember!

Life Expectancy

How long will it take for your team to accomplish its goals? A time frame will help you structure the scope of your work as well inform others of your commitment to your purpose. This will also help potential members decide on their ability to make the needed commitment.

- *Will you exist for one month? One year? On-going?....*

Communication

Remember to communicate with those individuals who will be impacted by your decisions and outcomes. For best results, communicate frequently and in various methods to ensure everyone is reached.

- *What needs to be communicated? To whom? By whom? When?*
- *When is the most effective time to communicate the information?*
- *How will the information be distributed and feedback collected?*
- *What communication resources do you already have?*
- *How will you know when the work of your team is finished?*

Other Resources

Think about the team's needed resources

- *What are the resources needed for your team to accomplish your goals?*
- *Are the resources human? Skill based? Time and energy?*
- *Who can help you find the resources needed?*

Financial Resources

Think about the team's financial needs.

- *Does your team need money to operate and support team needs?*
- *Where will the money come from?*
- *How do you assess those needs?*
- *Who approves spending and who will manage the overall budget*