**Development, Implementation, and Assessment**

**TOOLKIT**



**TEAM CHARTER TOOL**

A team charter is a formal document describing the work a team will do and how the team will do it. The implementation team charter should be created early in the initiative, perhaps even drafted by two or three people until the full team is organized. This critical step should not be overlooked, but it also should not be given too much time; a team charter is a living document that should be reviewed and revised as the initiative progresses. For example, the charter can help a team get back on track when it is not doing the work that it was originally charged to do. If the implementation team finds that other teams are needed to address certain functions, it should “charter” these new teams by specifying their goals, the timeframe for achieving those goals, and the teams’ expected deliverables.

This tool can guide the development of a formal team charter. Before your team starts working on the initiative, it should discuss and agree on what work it will do and establish guidelines for how the team will operate. Use the questions on the left to guide your discussion, and take notes on the right. Once you have covered each of the elements below, you will be ready to write your team charter.

***This tool may be used in two ways:***

1. ***Print the following pages and use them as a discussion guide with your team. Write your answers in the space provided.***
2. ***Type your information into the space provided and save to your computer. This will allow you to print the completed document or e-mail it to your team members.***

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| **Elements** | **Key Discussion Points** |
| **Mission of the initiative—**Include background information about the work you will do and a brief statement about the expected outcomes. | What is the problem that is being addressed? |
| What result or outcome is expected? |
| Why is it important to solve this problem? |
| What are leadership and other stakeholders expecting this team to do? |
| **Goals and objectives for the work the team will do—**Be specific and include a timeframe for achieving the goals. | What do we want to accomplish, achieve, or create as a team? |
| How will we know when we have accomplished our goals and objectives? |
| How much time will we need to complete our objectives? |

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| **Elements** | **Key Discussion Points** |
| **Scope, boundaries, and timeframe for completing the work—**Define what the work is and is not and how the team will know when it is finished. | What resources are available? |
| Are the available resources adequate for completing the work? |
| Is anything missing that we need to request from leadership? |
| How has the money been allocated in the budget? |
| **Expected deliverables—**List deliverables that are tied to the goals and objectives for the project and that help define the timeframe and milestones. | Make a list of the tasks and deliverables |

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| **Elements** | **Key Discussion Points** |
| **Decision-making authority—** Clarify who is on the team, the skills they bring, and their decision- making power. | What skills and competencies are needed? |
| What kinds of decisions will we make? |
| Do our members have the knowledge and authority to do this work and make these decisions? |
| What authority do we need to implement decisions? |
| How many team members do we need? |

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| **Elements** | **Key Discussion Points** |
| **Decision-making policy—**Outline how decisions will be made within the team. | What will be our primary decision-making method (e.g., consensus)? |
| Will there be exceptions to our decision-making policy? |
| Who, if anyone, can block decisions? |
| Do all members have equal voting rights? |
| What is non-negotiable? |
| **Leadership—**Determine who is authorizing/sponsoring the team and who are the team leaders. | Who is the team leader? Who are the co-leaders? |
| How do we share leadership responsibilities? |
| Who on the executive leadership team is sponsoring this work and supporting the team leader? |

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| **Elements** | **Key Discussion Points** |
| **Communication strategies—** Identify with whom the team will communicate; how and how often; and for what purpose. Consider communication with those internal to the organization as well as those outside of the organization. | Identify other teams and stakeholders with which our team will need to communicate. |
| Communicate with other teams to determine how information will be shared as well as how information will be shared with our team members. |
| Identify the kinds of information that will need to be shared. |
| Identify feedback loops that already exist and others that might need to be created. |
| Identify resources that will help everyone stay informed and involved; for example, are collaborative workspaces available? Are there regular presentations at stakeholder meetings? |
| Decide how often information should be shared. |
| Specify responsibility and authority for sharing information. |
| Identify obstacles to communication and define strategies for addressing obstacles and challenges. |
| Discuss the importance of buy-in and maintaining momentum and brainstorm strategies for accomplishing this within the team and with outside stakeholders. |

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| **Elements** | **Key Discussion Points** |
| **Roles and Responsibilities—** Identify who will participate and in what ways, and set guidelines for acceptable behavior. | How often will we meet? For how long? When? Where? |
| How do we develop meeting agendas? |
| Who will lead or facilitate the meetings? |
| How will we keep track of our decisions and agreed-upon actions? |
| What are our individual responsibilities? |

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| **Elements** | **Key Discussion Points** |
| **Roles and responsibilities—** Identify who will participate and in what ways, and set guidelines for acceptable behavior. | What are our individual skills and functional areas of responsibility? |
| How will individual members be held accountable and performance judged? |
| Do we have the right people on the team to accomplish the work we are charged with doing? |
| How will we resolve conflict? |
| How will we evaluate our team performance? |