

# Charter the Team

## *Set A Team Up For Success*

*“A team is a small number of people with complementary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable.”*

Katzenbach and Smith (2015) **The Wisdom of Teams**

I have used this simple and direct description of a team for many years. It gets to the heart of the matter in distinguishing effective teams from ineffective teams, and from groups in general.

However, no team will be able to maintain its focus on a common purpose, goals and an approach without being clear and explicit about what these are. And this clear agreement forms the basis for the mutual accountability that is a hallmark of effective teams.

The “Team Charter” tool helps teams have the vital conversations that bring alignment and agreement about purpose, goals and approach. It serves to remind team members of issues that they need to make explicit, testing for agreement as they dialogue around different expectations and experiences.





## Purpose and Direction

The team has to be clear on why it exists and where it is going. This is fundamental. Without a sense of direction that is clear, challenging, and consequential, people won't know why they have been brought together.

- What is the reason we are here?
- Is our direction clear (without being overly prescriptive)?
- Do we feel realistically challenged by where we are headed?



## Team Goals

These statements describe the more tangible outputs of the team. What the team is trying to do. Goals should be as specific as possible so the team knows when it has achieved them.

- What do we intend to achieve?
- What are we responsible for producing?



## Norms and Agreements

Norms and agreements shape the behaviors desired among members. Norms are part of the team's enabling structure, a short list of those things members will always (or never) do. Agreements lay out the way team members will behave with one another.

- What do we see around us that will influence what we do next?
- What must we always (or never) do?
- What are the key behaviors we expect from each other?





## Measures

Measures should focus on relevant aspects of the team's work, including goals, group success, and individual achievement that is in service to the team. A few meaningful measures are more valuable to a team than a long list that is burdensome to monitor.

- What are the most important aspects of our work and operation?
- What do we need to know in order to remain confident we are on track?

## Team Composition and Roles

The team should have the appropriate number of people with the necessary (complementary) skills and experience to accomplish its work.



- Who are we? Who is responsible for what?
- What are we able to do (capabilities)?
- Should we have a core group responsible for most of the work?
- Will we have specialized contingent members?
- How are we going to handle leadership?

If the right team size seems large (i.e. in excess of 8-10 members), consider alternate structures.

## Organizational Context

No team operates in a vacuum. Members always need to pay attention to the financial, political, social, technological, and other aspects of their environment.



- Do we have the tools and resources we need?
- What's going on elsewhere in the organization or the wider landscape that might impact what we are trying to do?
- What can we do about that?



# Team Charter

Team Name: \_\_\_\_\_

Date: \_\_\_\_\_

Our Purpose/Direction	Goals
Team Composition & Roles	Key Measures
Team Norms & Agreements	
Organizational Context	

