

Charter For Leaders in New Roles, Work Teams and Project Teams

Project Name: _____
 Team Name: _____
 Leader Name: _____

Team Members

NAME / TIME ZONE / TITLE	PHONE (P) / MOBILE (M) / EMAIL ADDRESS	EXPERTISE	STRETCH GOALS	ASSESSMENT RESULTS

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Team Member Skill Inventory

Name: _____

I can contribute in the following areas:

I am experienced in the following areas:

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I would like to learn/improve/stretch my abilities in the following areas:

I look for the following attributes in determining team success:

My governing values which support and direct all that I do include: _____

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My personal goals for being on this team include: _____

According to my leadership assessment results:

- I receive information best in the following way: _____

- I receive feedback best in the following way: _____

- I provide my ideas and thoughts in the following ways: _____

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Team Commitment

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On _____, each team member committed to the following:

A. Our Team Goals:

Goal 1: _____

Goal 2: _____

Goal 3: _____

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Goal 4: _____

Goal 5: _____

B. We've also identified potential barriers which will prevent us from achieving these goals:

Barrier 1: _____

Barrier 2: _____

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Barrier 3: _____

Barrier 4: _____

Barrier 5: _____

C. We've developed initial strategies to overcome these barriers:

Strategy 1: _____

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Strategy 2: _____

Strategy 3: _____

Strategy 4: _____

Strategy 5: _____

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D. We've agreed to the following accountability philosophies (Refer to the Accountability Ladder):

Philosophy 1: _____

Philosophy 2: _____

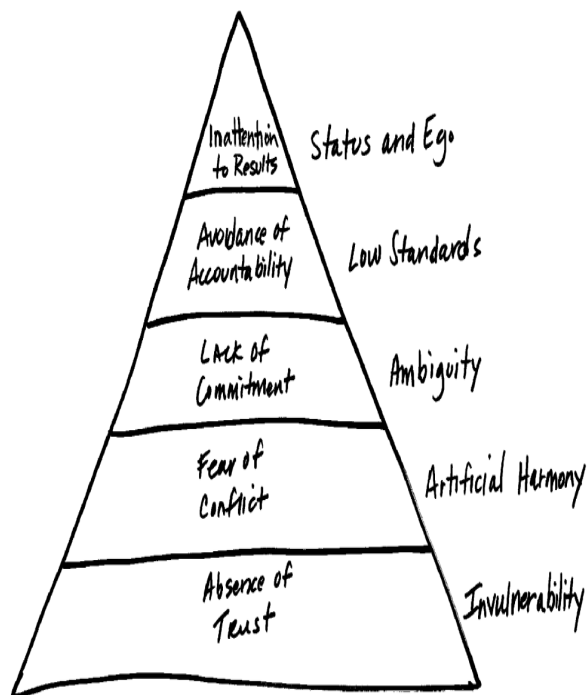
Philosophy 3: _____

Philosophy 4: _____

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Philosophy 5: _____

E. When conflict arises, we will look to the following resolution strategies:



1. _____

2. _____

3. _____

4. _____

5. _____

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F. We've also agreed to the following meeting ground rules:

Ground Rule 1: _____

Ground Rule 2: _____

Ground Rule 3: _____

Ground Rule 4: _____

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Ground Rule 5: _____

G. We've agreed to the following elements in making decisions:

Making Decisions Rule 1: _____

Making Decisions Rule 2: _____

Making Decisions Rule 3: _____

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Making Decisions Rule 4: _____

Making Decisions Rule 5: _____

H. We've agreed to the following rules in problem solving:

Problem Solving Rule 1: _____

Problem Solving Rule 2: _____

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Problem Solving Rule 3: _____

Problem Solving Rule 4: _____

Problem Solving Rule 5: _____

I. We've agreed to review and update this charter _____ per _____:

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J. Charter Context

This is the introduction to the charter. It sets out why the team was formed, the problem it's trying to solve, how this problem fits in with the broader objectives of the organization, and the consequences of the problem going unchecked.

What problem is being addressed?

What result or delivery is expected?

Why is this important?

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K. Mission and Objectives

This section is at the heart of the Charter. By defining a mission, the team knows what it has to achieve. Without a clear mission, individuals can too easily pursue their own agendas independently of, and sometimes irrespective of, the overarching goal.

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The next stage is to take the mission and turn it into measurable goals and objectives. These are the critical targets and milestones that will keep the team on track. When writing goals and objectives, consider using the SMART framework (SMART usually stands for Specific, Measurable, Attainable, Relevant, and Time-bound). The key here is to make sure each objective can be measured, so that success can be monitored. Reach out to your Crowned Grace International OD/OCM Consultant to learn more about OGIM™ when setting your Objectives, Goals, Initiatives and Metrics!

L. Composition and Roles

Teams are most effective when:

- They have members with the skills and experience needed to do the job.
- Team members can bring experience and approaches from a range of different backgrounds.

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- They have enough people to do the job, but not so many that people get bogged down in communication (seven to nine is an ideal number of people).
- They have representation from involved functions, departments, units, or other relevant category of stakeholder (possibly including the team's client, and senior management).

Look to your mission and objectives to determine who is needed on the team to make sure its goals can be accomplished. Once you know who should be on the team, you need to look at what each person will do to support the team in its mission. While this may seem like overkill at the very beginning of team formation, it will help you to

- Match team members to roles.
- Spot gaps in skills and abilities that are necessary for the team to reach its goals.

The best way to go about this is to list each team member and define the roles and responsibilities of each.

- Who will be the team leader?
- Who is the liaison between the team and the other stakeholders?
- Who is responsible for what duties and outcomes?

N. Authority and Empowerment

With the roles defined, you now need to look at what team members can and can't do to achieve the mission:

- How much time should team members allocate to the team mission, and what priority do team activities have relative to other ongoing activities?
- How should team members resolve any conflicts between their day jobs and the team mission?

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- What budget is available, in terms of time and money?
- Can the team recruit new team members?
- What can the team do, what can it not do, and what does it need prior approval to do?

O. Resources and Support Available

This section lists the resources available to the team to accomplish its goals. This includes budgets, time, equipment, and people. In conjunction with the performance assessments, changes to the resources required should be monitored regularly. It should also detail the training and coaching support available to the team to help it to do its job.

P. Operations

This section outlines how the team will operate on a day-to-day basis. This can be as detailed or as minimal as the situation warrants. It may be comprehensive and detailed for a long-duration team or limited to a few bullet points in a team that is expected to have a short lifespan.

Q. Negotiation and Agreement

A good Team Charter emerges naturally through a process of negotiation. The team's client establishes the context and mission. objectives, composition, roles, boundaries and resources ideally emerge through negotiation between the sponsor, the team leader, the team, and other stakeholders. Tip: We're using the word "negotiation" here ... it may not seem to be that way! Three things which are key to your success include:

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1. Discussion within the team and with the team leader to ensure that the mission and team charter is credible.
2. Assertive negotiation between the sponsor and the team leader to ensure that the mission is achievable and that sufficient resources are available and deployed.
3. Support from the sponsor to ensure that these resources are actually made available.

While these may appear to be standard discussions between a leader and his/her team, negotiation is actually taking place in a real way. Ultimately, the team must believe that the mission is achievable and commit to it! Last, but not least, comes approval. This is where all members of the team sign off on the Charter and commit to the principles it contains and the roles and responsibilities detailed. This is a symbolic gesture that communicates full commitment to the mission and objectives. It also helps to create accountability to one another and to the organization.

Developing your team charter at the beginning of a project and/or taking on a new leadership role – sets you and your team up for success. You as the leader ensure that everyone understands what is needed, required and expected for on-going success. It also can identify gaps which may prevent you / your team from being successful.

Done with active participation of your team allows wholehearted commitment to the team/project success.