



## JUMPSTART TEAM SUCCESS: CREATE A TEAM CHARTER

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"Behaviors are rooted in the spoken and unspoken agreements we make with each other. Our interactions with others change when we decide to be together in a different way."

--Margaret Wheatley

*When a group first forms, there is minimal trust, no shared goals, no history of past performance, and roles are unclear. Despite this lack of clarity, members are eager to jump into the task at hand. The single most critical success factor in high performing teams is having a shared understanding of why a team exists and what it is trying to accomplish. This guide describes a straightforward approach to team start-up that enables a group to become a functional team and deliver better results faster.*

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### TEAM CHARTER PURPOSE

A *team charter* is a document that defines the purpose of a team, expected outcomes and how the team will work together for results. It is a set of agreements created when a team forms to ensure everyone is on the same page from the start.

### KEY ELEMENTS OF A TEAM CHARTER (TO BE ADAPTED TO EACH SITUATION)

1. **Purpose and Key Responsibilities:** the reason for the team's existence and what members hold themselves accountable for as a team. Purpose statements are often more powerful when stated from the viewpoint of the customer.
2. **Vision:** a results-oriented picture of the team that describes what members commit to achieve together sometime in the future.
3. **Values:** beliefs or principles that define what is important to team members and serve to guide the team's actions and decisions. They are not compromised for short term gain or expediency. These are most useful when they are defined in terms of specific behaviors.
4. **Goals:** specific, measurable results that are aligned with the team's purpose and vision.
5. **Roles and Responsibilities:** description of who is on the team and their functional responsibilities.
6. **Mutual Expectations:** ground rules that clarify how team members will interact, collaborate, support each other and give each other feedback.
7. **Operating Procedures:** descriptions of meeting structure, communication norms, decision-making methods, conflict resolution, and reflection strategies.

## BENEFITS OF DEVELOPING A TEAM CHARTER

- Builds alignment so everyone is moving in the same direction
- Provides clarity of purpose, priorities, roles and informs the allocation of resources
- Clarifies mutual expectations and anticipates potential “rubs”
- Creates buy-in and commitment for accomplishing the work of the team
- Enhances communication, trust, and collaboration
- Helps team members stay focused and realign when times get tough

## GREAT EXCUSES FOR NOT DEVELOPING A CHARTER

- *We know what we need to do, we don't need a charter*
- *We'll figure things out as we go along*
- *We don't have time for that, we have work to do*
- *Team membership is a revolving door, why bother?*
- *We have designated leadership, its their job to provide direction*

## HOW TO DEVELOP A TEAM CHARTER

- For a new or reconstituted team, plan a two-hour meeting.
- The team leader engages the team in a discussion, using the list of questions on page 3 of this guide.
- The leader then drafts the charter based on agreements made during the conversation. *Alternatively, the team leader drafts a charter in advance of the meeting and then facilitates a discussion to modify and adopt it.*

## HARD WON WISDOM – WHAT WE'VE LEARNED

- Creating a charter is the most powerful, effective and efficient way to create an engaged and aligned team before jumping into the work at hand.
- Time taken to create a team charter will be repaid many times over as the team matures.
- A charter is a living document that must be periodically reviewed and modified. It is extremely helpful to reference agreements made when confusion or conflict arises.
- When a new member joins the team, reviewing the charter provides context and facilitates effective assimilation more quickly.

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## QUESTIONS TO CREATE A HIGH-PERFORMING TEAM

*BEFORE focusing on the “work,” having a proactive, upfront conversation of the topics listed below enables a new group to gel as a team and become effective much more quickly. Documenting responses to the questions becomes the basis for a “team charter” which specifies team goals, values, roles, responsibilities, and how the group will work together.*

TOPIC	SAMPLE QUESTIONS TO ADDRESS EACH TOPIC
<b>Purpose and Key Responsibilities</b>	What is our purpose; why do we exist? What are our key responsibilities as a team? What are others counting on us to do?
<b>Vision</b>	What do we want to accomplish, achieve, or create as a team? What will be the impact of our collective efforts?
<b>Values</b>	What are the most important values that we will adopt to guide our actions and decisions as a team (e.g. integrity)? What are the specific behaviors that describe each value? (e.g. integrity = we do what we say we will do)
<b>Goals</b>	What are our shared team goals and deliverables? How will we measure our success?
<b>Roles and Responsibilities</b>	What are our individual skills and functional areas of responsibility? How do our individual accountabilities impact each other?
<b>Mutual Expectations</b>	What specific behaviors do we want and expect of each other? What behaviors would negatively impact our working relationship? What is the best way to give each other feedback?
<b>Operating Procedures:</b> <i>--Team Meetings</i>	How often will we meet? For how long? When & where? How will we develop meeting agendas? Who will lead or facilitate our meetings? How will we keep track of our decisions and agreed-upon actions?
<i>--Communication</i>	What is the best way to communicate with each other and keep each other informed? (e.g. voicemail, e-mail) How quickly do we agree to return phone calls and e-mail? How and what will we communicate to our key constituents?
<i>--Decision-Making</i>	What will be our primary decision-making method? (e.g. consensus) What decisions will we make on our own? What decisions will require agreement among all team members?
<i>--Conflict</i>	How will we resolve disagreements? How will we handle if we do not follow through with our agreements?
<i>--Reflection</i>	How and when will we evaluate our team performance?