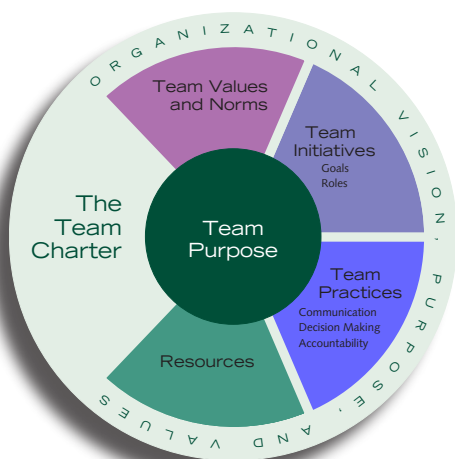


# Team Charter Process

## Is Your Team Operating in Unchartered Territory?

As the Cheshire Cat said to Alice, *“If you don’t know where you’re going, any road will get you there.”* That philosophy didn’t work for Alice, and it won’t work for anyone in today’s business world.

The number one success factor of high performing teams—whether working face-to-face or virtually—is the alignment that is specified in a set of agreements that clearly states what the team wants to accomplish, why it is important, and how the team will work together to achieve results. Creating a clear team charter is the single most important step for getting a team off to a good start and keeping it on track throughout its existence.



The team chartering process explores the elements of a team charter and provides guidance for working through each element including instructions for writing formal team initiatives and goals. The elements of the charter include:

- **Organizational Vision, Purpose, and Values** are the foundation for the Team Charter. They provide the context for the team’s existence.
- **Team Purpose** is the reason for the team’s existence. It states:
  - What the team does
  - For whom
  - Why
- **Team Values and Norms** which are the enduring principles that guide the team’s actions and the ground rules that identify appropriate behaviors for team members.
- **Team Initiatives** which are the broad areas of focus necessary to achieve the team’s purpose. These include Team Goals which identify the measurable outcomes needed to achieve the team’s purpose and Team Member Roles which identifies the key responsibility areas of each team member for achieving the goals.
- **Team Practices** are the strategies and processes that need to be clarified and set up in order to accomplish the work of the team.
- **Communication Strategies** is the process for sharing information both within the team and outside the team.
- **Decision Making and Accountability** determines the process for how decisions are made and communicated in addition to establishing agreement on how team members hold each other responsible for commitments made to the team.
- **Resources** are the tangible materials and organizational support the team needs to accomplish its goals.

# Data Sheet

## Audience

For new and existing teams at all levels, including self-directed teams

## Format

The chartering process is simple and easy to follow. It is designed so that the team leader or a team member can lead the team through all the elements of a team charter. Team members are provided with Team Charter Worksheets to be completed in class or online to stimulate ideas and record their initial thinking.

A Microsoft® Word® file containing a template for the team charter is also provided and can be used by a scribe during the chartering sessions to draft on a laptop the essence of the team's agreements as they are discussed and decided on. Often wordsmithing each section can be done by one or two members outside of the session and forwarded to the rest of the team for final approval and then to other key stakeholders.



The Team Charter Leader Package provides a team leader with the tools for facilitating a face-to-face or virtual session. Depending on the complexity of the team's purpose, as well as the size of the team, the chartering process can be done in either of two ways, and for different lengths of meetings, and over various periods of time.

The Face-to-face session can be completed in one-half to two days or in a series of shorter sessions.

The virtual session is facilitated during a series of teleconference calls or WebEx sessions.

## Outcomes

By participating in the chartering process, a team can

- Develop a solid foundation for building high performing teams and sustaining performance
- Provide the structure and direction it needs to stay focused on a common end result
- Learn to document team agreements regarding performance and hold itself accountable
- Create buy-in and increase commitment for accomplishing the work of the team
- Increase communication, trust, and effectiveness.

For more information, please contact your Blanchard® Sales Associate at 800 728-6000 or 760 489-5005.