

## **Chartering Teams Template**

Chartering is a process by which expectations of a taskforce or working work team are clarified and translated into a scope of work. Charter formats vary from organization to organization, but there are some useful guidelines to make chartering successful. Developing a charter typically involves both an organization's leadership team (the "sponsors" of the work) and work team members who will do the work being chartered. A good charter is not overly prescriptive. It does not contain every detail about the work to be done. It offers enough detail to guide the work team to complete the work, while allowing the work team some flexibility to decide exactly how the work will be completed.

Common elements of an effective charter include:

- **Parameters of Work:** This defines what constitutes the work team's scope.
- **Organization of the Project:** This specifies who will serve on a work team, for how long, and, if necessary, with what provisions for backfilling them in their regular work. This establishes the basis whereby supervisors of daily performance can make accommodations to other work priorities while individuals serve on these work teams.
- **Conditions of Satisfaction:** This specifies two things: (1) the general outcome expected and (2) the specific, measurable outputs or products of the work team. Specifying both balances a focus on tangible production and accountability with the overall purpose of the initiative.
- **Commitments to the Work Team:** Work teams often need various forms of support from the Leadership Team during their commitment. These forms are feedback, information, encouragement, resources, help removing or navigating various obstacles to success, and opportunities to discuss progress and reflect on how the initiative and charter is translating into value for clients and the organization.

A crucial element of chartering is assigning specific people to perform the work. If the sponsor group has not already developed standing work teams or specific taskforces, this is an important initial step to take.

Effective work teams typically:

- Have a point-person or team leader;
- Identify environmental obstacles early in their planning and data gathering;
- Gather input widely and include individual and group input where the expertise or relevance is high;
- Plan for communicating progress regarding their work;
- Request extra hands and other resources as needed;
- Provide alternative solutions to the sponsor group versus a single preferred one; and,
- Identify development gaps within the organization that will need to be addressed in implementing any new process, system, or technology needed as a result of their work.

Once the scope of the work is defined in a charter, the work team assigned to the work creates an action plan, detailing the specific tasks and timelines for completion of the charter goals and additional resources needed from the leadership team (if any). Considering the objectives in their charter, members should specify the following in their action plan:

- What work steps will be accomplished;
- Who will be primarily responsible for the steps;
- When we will accomplish them;
- What resources will be required; and,
- What specific progress measures or general milestones we will track.

Action plan formats vary. The most important attributes of effective action plans are that they stress substance over form, serve to track and communicate work progress, and keep a sense of accountability in place over time.

## **Charter Template**

**Charter for:**

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**This section to be completed by the sponsors of the work:**

**Rationale:** Why is the work team being charged to perform the work?

**Work Team Members and Leadership:** Names of group members and who will lead the work team (single chair or co-chair)

**Boundaries:** What the work team can do and what work team cannot do – what is the decision making scope of the work team?

**Goals:** What are the expected outputs and outcomes of the work team?

**Completion Date:** How long should the work continue? When should the work team be done with its work?

**Impact:** How does it benefit the agency and its client?

**Communication:** What will be communicated about the charge of the work team? Who will communicate the charge and activities of the work team? What will the communication structure back to the sponsor group be?

**This section to be completed by work team:**

**Activities/Tasks /Timelines:** This section should be completed by the work team and submitted to the sponsors to ensure support and “buy-in” on the way the work team has chosen to complete its work. Reviewing this section with sponsors also allows the work team to secure necessary resources they have identified for the completion of the work.

**Accomplishments and Date Charter Closed:** At the completion of a charter, the work team should complete this section to document the accomplishments of the work team. The agency leadership could spotlight accomplishment at staff meetings, in agency newsletters, or agency bulletin boards.