

# Draft Guidelines for a Team Charter

## STATEMENT OF PURPOSE

States the purpose of the team and why it has been created.

## GOALS

Team goals are stated here. Use SMART goal setting guidelines. SMART stands for Specific, Measurable, Achievable, Results-oriented, and Time bound.

## TIME REQUIREMENTS

State the time requirements for the team. Self-Directed Work Teams meet weekly for 45–60 minutes and 5–10 minutes for daily team huddles. Cross Functional teams should include the time for the meeting and outside preparation work needed to complete team activities. This information must be given to prospective team member's managers/ coaches to determine availability for the team. The charter should include a statement that time requirements exceeding those stated in the charter must be approved by the coach/sponsor.

## EXPECTED ACTIVITIES

List the major milestones that the team must reach to achieve high performance and the team goals. It's an option to add the work breakdown plan to the charter.

## AVAILABLE and NEEDED RESOURCES

Those things needed and in place to support the team in its purpose and goals.

## EXPECTED COMMUNICATIONS

Defines how the team communicates within and outside the team on team's progress as a team and on progress in meeting the team's purpose and goals. Communication should define the frequency and type of communication including scribe notes, reports on progress, and updates required to the sponsor/coach.

## EXPECTED MEASURING POINTS

How the team will measure progress in achieving its goals and purpose. This section should include "hard" measures such as quantity and time as well as "soft" measures such as quality and team effectiveness.

## SKILLS and ABILITIES NEEDED

List skills needed in each *individual team member* and also skills needed *within the team as a whole*.

## MEMBERSHIP

List the team executive sponsor, sponsor, coach, and team membership here or refer to the team roster attachment and its location. In the case of a cross functional team, this section should also include how membership should be rotated after the first year.

## ROLES and RESPONSIBILITIES

Meeting roles, star point roles, and any other roles the team uses and its responsibilities.

## AUTHORITY LEVEL

What the team has authority to do, as delegated by either the coach or the sponsor or founding group.

## NON-NEGOTIABLES

Those items the team does not have decision making authority for, and are outside their focus and should not be topics of discussion.

Some examples of non-negotiables:

- selection of coach/sponsor
- banning coach or sponsor from meetings
- SDWT's membership

## NEGOTIABLES

Those items the team has authority to make decisions or recommendations for and should have discussions on.

## OTHER SIGNIFICANT ROLES and RELATIONSHIPS

Note other key interactions and relationships of the team.

## ATTACHMENTS TO THE CHARTER

Things that may be helpful to attach to the team charter:

- Work breakdown plans for each goal
- Help/hinder list
- Meeting protocol
- Conflict resolution protocol
- Decision making protocol
- Membership rotation protocol (if needed)
- Communication protocol (if needed)