

Team Chartering

Rationale, Process and Team Charter Starter

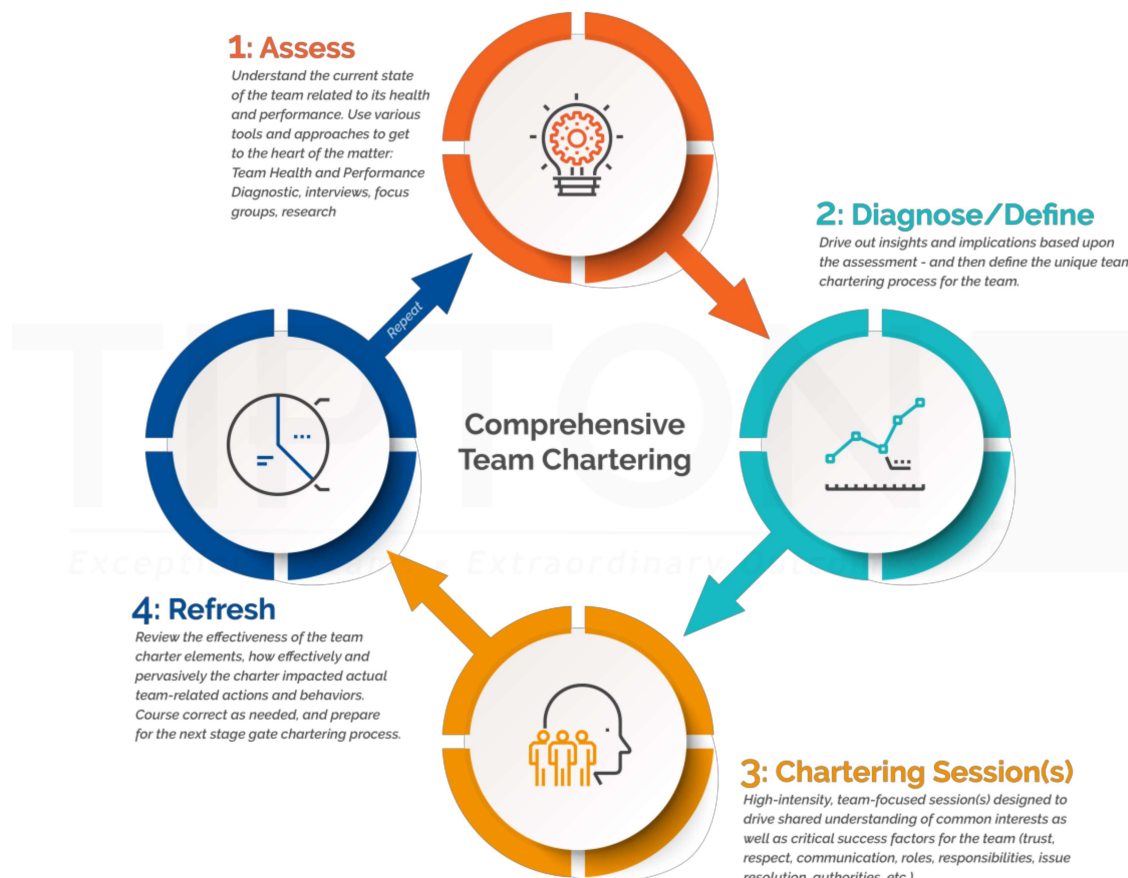
Rationale:

In our 40+ years of leading teams, we’ve learned that the most successful projects are delivered by teams who charter themselves effectively. These teams apply intentional and meaningful attention to team dynamics (the “behaving and communicating of the team”), they identify stakeholders, and they establish operating agreements, strategic priorities, goals and measures, decision-making frameworks, and roles and responsibilities during project initiation and throughout project execution.

With clarity and alignment around a meaningful and relevant charter, individual team members will avoid making personal interpretations and decisions — thus **mitigating project-related risk** to scope, schedule, budget, and quality.

Process:

Team chartering is a process, not an event. Authentic alignment, psychological safety (the idea that what needs to be said is said, when it needs to be said - without fear of repercussions or retribution), trust and transparency aren’t created in a single, procedural meeting (e.g., the proverbial “partnering session”). Team chartering is most effectively done as part of major stage gates in a project - initiation, execution (and at key stage gates within execution like planning, design, construction, warranty, etc.), and close-out. Below we show the high-level process we use in chartering project teams:



Team Charter Starter

The Foundation for a Healthy Project Team

When addressed proactively, a team charter defining a team's purpose, their relationship(s) with stakeholders, operating agreements, strategic priorities, goals and measures, decision-making frameworks, and roles and responsibilities can result in remarkable outcomes. However, when comprehensive team chartering is not an option, or a project is well underway, know that creating alignment around *any* of the eight components of a team charter can improve (or reorient) a project team's trajectory and mitigate risk to scope, schedule, budget, and quality.

To help you start chartering your teams, we've outlined the eight components of a team charter, the value of having aligned answers to each, and the questions we use to set the stage when facilitating work sessions to arrive at an "endorsable" (by all) team charter:

1: Articulate the Team's Purpose

Why do it?: The team purpose is the sole reason - the *why* - members of this team are coming together. Bringing the team back to its agreed-to purpose - whether that is at major stage gates, when onboarding new team members, or when the group finds themselves at an impasse - a defined team purpose helps level set the group, strip away ambiguity, and re-establish that the whole is greater than the sum of its parts.

Starter Question: What is the purpose of this team?

2: Identify Stakeholders

Why do it?: Identifying stakeholders provides clarity regarding not only who all the stakeholders are, but their relative proximity and importance to the project. When teams are able to bucket stakeholder groups into those with actionable roles in the project, those who will influence the project, and those who need to be kept informed about the project, it helps set appropriate expectations for and with each stakeholder group communication and level of involvement.

Starter Question: Who receives the outcomes of this team's work?

3: Establish the Team's Operating Agreements

Why do it?: By developing agreements for *how* the team intentionally decides to operate, communicate, and interact with each other, we are able establish behavioral expectations (trust, transparency, psychological safety), rather than accept behaviors that can lead to project risk (silos of information, loudest voice wins, placing an individual or organization above the objectives of the team).

Starter Question: How will this team work together to accomplish their purpose?

4: Establish the Team's Strategic Priorities

Why do it?: Strategic priorities are the guiding force behind aligned, program-centric decision making. They act as a compass - that won't tell you exactly what decision to make, only whether the decisions being made are leading the team in the right direction. Often, strategic priorities are based on

company / organizational culture, mission, or high level strategic plans that a team is charged with delivering (its purpose).

Starter Question: What strategic lens will this team use to make decisions and create deliverables?

5: Create Goals and Measures

Why do it?: Creating goals and measures allows the group to understand - specifically - what things the team is *doing* in order to deliver its purpose. Further, by establishing measurement criteria for goals, the team can assess whether progress is being made in achieving their goals. This work is especially useful for understanding *what* the team is doing from a project perspective.

Starter Question: What are the primary goals and measures this team will use to know whether it has been successful (achieved its purpose)? When finished, in a sentence or two, articulate what success looks like.

6: Develop the Team's Decision-Making Approaches

Why do it?: Decision-making models allow interconnected-but-distinct organizations the benefit of understanding why, who, how and when decisions will be made throughout the project duration. They are also used to establish an “issue resolution” process - before issues arise - to resolve unexpected changes in a project's scope, schedule or budget.

Starter Questions: *How will this team make the cathartic decisions (answers the “why” behind an issue) to achieve their purpose? How will this team make the salient decisions (answers the “what, when, how, and who” behind an issue) to achieve their purpose? How will this team resolve issues when at an impasse (issue arises that doesn't fit the mold, etc.)?*

7: Define and Distribute Roles and Responsibilities

Why do it?: By defining the roles and responsibilities required for a successful project or outcomes and allocating them to team members, everyone will have a clear understanding of how they, and others, will be held accountable to the team and support its purpose.

Starter Question: *How is each person accountable to the team and its purpose?*

8: Endorse the Charter

Why do it?: The act of signing or verbally acknowledging one's commitment to a team and its purpose naturally produces a moment of reflection regarding each member's alignment with all elements of the charter. Further, the explicit nature of endorsing a charter seals the bond among team members - it underpins healthy team dynamics throughout the project's duration.

Starter Question: *Do you commit fully to this charter and fulfilling the purpose of this team?*

TEAM TIPTON

Service Offerings



THE CHALLENGES YOU FACE

Team Tipton helps solve complex organizational development and change management issues to:



Create adaptable, resilient, and accountable teams

Align purpose and strategic direction



Address changes in leadership, organizational structure, programming, and technology

Increase healthy, productive interactions to minimize "human risks" that negatively impact outcomes



HOW WE DELIVER OUR SERVICES

Our services are delivered through virtual and in-person facilitation, Agile sprints, coaching, workshops, and "full-immersion" consulting. Engagements are customized to help your organization achieve extraordinary outcomes during times of uncertainty and change.

WHY THIS APPROACH WORKS

People don't resist change. People resist being changed without their involvement. Change is far more successful when done through people rather than to people. Team Tipton takes a "bottom up" approach to change, ensuring those who will live with the outcomes actively participate in creating those outcomes.

ARE WE RIGHT FOR YOU?

As a Certified B Corporation, Team Tipton focuses on assisting organizations that serve humanity and the public good. We contract directly with public organizations and partner with other private sector firms to ensure smooth delivery of large complex projects in federal, state and local governments, utilities, and public education institutions. In each engagement, we apply concrete and relevant industry experience across all organizational departments.

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