**TEAM CHARTER**

**Team Charter Overview**

In project management, the Team Charter can be thought of as the foundation upon which all of the team’s work, rules, tools, and behaviors are built. Unlike traditional project management, where a charter defines the project scope and success criteria, often pre-determined by senior management/sponsors, the benefits of a Team Charter created by the team members themselves are immediate buy-in and a vested interest in the success of the project. When project team members are able to directly contribute to and influence a project, they will be much more motivated for success.

**What Does the Team Charter Include?**

There is no standard or universal template for a Team Charter. The emphasis should be on people instead of the process. Successful project teams often focus on interpersonal communication over formalized documentation. The components of a Team Charter address the team’s dynamics, communication, and rules of behavior, the project’s vision, goals/objectives, mission, and success criteria.

The Team Charter Template that you will use incorporates sections for both the high-level project specific information and the interpersonal team dynamics. For maximum effectiveness and usefulness, each team member should keep a printed copy and have one on his/her computer. You may want to refer to it during meetings if this get off track or difficult. If you were a real functioning team and had an assigned room to work on the project or for meetings, you would want to post it on the wall or on a white board. Having the Team Charter available and visible will aid team project meetings when it is necessary to discuss any project information that is listed in the charter.

**Project Specific Information**

In modern project management, the process is iterative by nature and evolves throughout the project lifecycle, there is not much need for a great level of detail in the charter. In fact, since the charter is created in the beginning of the project, the team may not even know or understand a great level of detail yet. The project specific information that is included in the charter should be limited to a high-level vision (why the project has been initiated), a description of the mission or objectives, and what criteria constitute success for the project. All of this information is at a high enough level that it should be known to the project team at the outset of the project.

**Interpersonal Team Dynamics Information**

Because successful project management relies so much on a total team concept of buy-in and interpersonal communications, this section is an extremely important part of the charter. This portion of the team charter should describe the names and roles of project team members, how, when, and where team communications will occur, and the rules of behavior for the group. It is important that all team members contribute to these sections of the charter as this provides a sense of ownership for the team. The team must encourage contribution and feedback from all team members in order to provide a sense of ownership for the Team Charter.

**Sample Team Charter**

Refer to the sample Team Charter on page 2. There is no standard template for what should/should not be included, but this represents a general approach and good starting point. Based on the project type, team experience, this sample may be adjusted as necessary to accomplish your team’s specific intent.

**SAMPLE TEAM CHARTER**

**Project Name:** Invoice Tracking Database

**Vision:** Help the billing department reduce the number of monthly past-due accounts by providing an easy to use platform for tracking accounts receivable.

**Mission:** Create an invoice tracking database that enables billing employees to view real-time account statuses, engage vendors proactively to resolve accounts, and generate weekly and monthly account reports.

**Success Criteria (criteria that the sponsor will use to determine whether or to what degree the project objectives are achieved):**

1. Implement database by March 1, 20xx
2. Reduce monthly past-due accounts by 75% after 3 months
3. Achieve > 80% favorability among billing employees via survey after 3 months

**Project Team**

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Phone** |
| A. Black | Product Owner | (555) 555-1111 |
| B. White | Scrum Master | (555) 555-2222 |
| C. Green | Programmer | (555) 555-1414 |
| D. Teal | Database Administrator | (555) 555-3333 |
| E. Gray | Network Administrator | (555) 555-1515 |
| F. Brown | Billing Coordinator | (555) 555-4444 |

**Rules of Behavior:**

1. All team members will treat each other with respect at all times.
2. Constructive feedback is a valuable part of our success, so we will not take offense, and all team members will ensure all feedback is provided in a constructive manner.
3. Open communication among the team is always welcomed and valued.
4. We will recognize and celebrate all individual and team accomplishments.
5. All personal cell phones will be turned off prior to beginning any of our meetings or discussions.
6. We will accept responsibility and be accountable for our actions.
7. We will give consideration to whomever is speaking and avoid sidebars or speaking over one another.
8. We will work collaboratively when possible and use a consensus approach when making team decisions.

**Communications:**

1. We will hold regular daily meetings in the team room at 9am each work day.
2. We will make every effort to attend all scheduled meetings in person (exceptions: scheduled and/or sick leave).
3. We will update our tasks on the kanban board each work day morning before 9am.
4. Meeting minutes will be sent out within 24 hours of each meeting.
5. The responsibility for meeting scribe will be shared by all team members on a rotating basis.
6. If a meeting must be cancelled or additional meetings are required, the Product Owner will send out notifications as early as possible.
7. All team members are expected to be on time for all meetings.