**Team Chartering**

Document that the team develops together that clarifies the purpose, direction and establishes boundaries. It is developed at the beginning of a team formation or project inception and creates buy-in from all members.

In some companies, this is a very formal process that is completely documented and signed by all parties and in others, it is more informal. (There are also some companies that have not embraced or do this yet.)

Let’s break it down:

**Team Purpose –** What’s the value of the team for a project?

What problem are they facing and what would be an acceptable outcome?

**Duration/Time Commitment –** Set realistic expectations for the duration of the project and monthly/weekly/daily time commitment.

**Scope –** Considering the scope and what s expected by when helps to alleviate disappointment later. It helps define the beginning, middle, longer term goals and ultimate end result or future view. It creates boundaries to minimize or hopefully, eliminate scope creep.

**Members –** Each member is important and should be listed individually.

**Desired End Result –** This allows you to begin with the end in mind. Has anyone here ever completed the 7 Habits of Highly Effective People by Stephen Covey? Goals are clearly defined and beginning with the end in mind keeps you on track to achieving the end result as expected.

**Supporting Resources –** Supporting resources are additional people or departments that help support success but are not required on a daily basis as part of the project team. These members should be communicated with by the representatives selected from each area. As an example, if one payroll person is designated as the project led for their area, they are expected to be engaged, understand the info and share it with other payroll team members. When this doesn’t happen, there are gaps and hurt feelings (going back to EQ).
 **Reporting Plan –**This defines how the team will communicate progress and the timeline. For example, I keep my communication plan all together which includes how, when, and whom will be communicated with throughout the project. There are weekly meetings, monthly status updates and senior leadership reviews that re all planned well in advance. This process provides the opportunity to escalate and receive additional support and funding if and when needed throughout the project lifecycle.

**Deliverables –** This section defines the key outcomes that can be measured. They are scheduled, measured and evaluated to ensure they meet the initial goal. Without developing these upfront, it is easy to lose sight and develop deliverables based on restrictions instead of business expectations. It’s a way to create accountability.

**Links –**This outlines key resources and SME”s that may have overlap but provides alternate resources when needed.