



## Creating a Team Charter

Psychologist, Bruce Tuckman, has become famous for identifying the [stages teams go through](#) when they come together for the first time or undergo changes of personnel or purpose. He calls these stages: forming; storming; norming; performing and adjourning. Our aim should be to reach the performing stage as quickly as possible.

It's easy, though, for teams to get stuck in the early stages, with members unclear about what they're supposed to be doing and why and interpersonal conflicts threatening to get in the way of success. Once teams get off on the wrong foot, it can be hard to get people back on track, let alone get to Tuckman's performing stage.

That's where a team contract or charter can really help. Team charters are documents that define a team's purpose, who will do what, how it will work, and what the expected outcomes are. They offer a roadmap and guide so that everyone involved is clear about the direction of travel. Because they are created by team members working together, they can help to create buy-in and improve accountability. Above all, they help to reinforce the common purpose and goals that will bind a team together.

Ideally, teams will agree a charter when they first come together, but they can also be used at times of change or to course correct if things are going less well and we need to be reminded about our focus and the expectations team members have of one another.

Charters can take various forms depending on the team and the context it's working in. The real value is in working collaboratively to agree the terms of reference. These will usually include:

- Team purpose and mission: what are we here for? What are we trying to achieve?
- Team values: what do we stand for? What are our guiding principles?
- Team goals: how will we know when we've been successful? How do these relate to individual goals?
- Team roles: who are we and who will do what? To whom are we accountable? What other stakeholders will we need to communicate with?
- Team skills and resources: what do we have available to us and how will we use them?
- Team rules: How will we work together? What are our ground rules and expectations about behaviour? How will we create a safe space for everyone to contribute? How will we communicate and make decisions?

Charters might also refer to team strengths and areas of development identified by a [team SWOT exercise](#).

### How to create a team charter:

- 1 Use the template below (or customise it as necessary) to kick-start a team discussion.
- 2 Agree on and codify the team's terms of reference.
- 3 All team members should agree to abide by the charter by signing copies individually.
- 4 Keep the charter to hand as a point of reference – and remember to review it regularly, especially if team membership or your business context changes.

## XYZ team: Team charter

|                                  |              |
|----------------------------------|--------------|
| <b>Team purpose and mission</b>  |              |
| Team values                      |              |
| <b>Team goals</b>                |              |
| Team roles                       |              |
| <b>Team skills and resources</b> |              |
| Team rules                       |              |
| <b>Signed:</b>                   | <b>Date:</b> |

