[Team Name]

Charter

Directions

- The team leads are responsible for filling out the team charter document and keeping it up-to-date (except for sections marked with *, which signifies that the section should be filled out as a team during the team launch event).

- During regular team calls, ensure that the team charter is being upheld, and work to make any relevant alterations to the document. Ask:

    - Which agreements are working well and why?

    - Which agreements are not working?

    - What changes should be made to make this team more effective?

- Tips for success

    - Build your charter during the team launch event.

    - Make your charter visible/accessible to everyone on the team.

    - Consider your charter as an evolving document, not written in stone.

    - Use your charter for accountability and direction, not policing.

    - Review your charter during quarterly retrospectives (or more frequently if needed).

Team Purpose

This purpose statement is the most important component of the charter, as it allows for the structure of the team to be built on a solid foundation of what the team must accomplish together. A good purpose statement helps to align effort and motivate team members. Tip: Paste the team purpose at the top of the team notes document to keep the team focused and aligned. [Example team purpose statements.](#)

[Team name] exists to achieve [the primary purpose of the team] through

- Function or activity 1

- Function or activity 2

- Function or activity 3

In order to accomplish [the broader goal of organization.]

Team Structure

Team Members & Roles

- Team Lead: [Name, email address, phone number]

- Team Facilitator: [Name, email address, phone number]

- Team Coordinator: [Name, email address, phone number]

- Data Lead: [Name, email address, phone number]

- Logistics Lead: [Name, email address, phone number]

- Recruitment Lead: [Name, email address, phone number]

- Training Lead: [Name, email address, phone number]

- Member: [Name, email address, phone number]

- Member: [Name, email address, phone number]

- Member: [Name, email address, phone number]

Meetings & Coordinating Systems

- Rhythms: When/how does the team meet in general?

  -

- Google Drive Folder Link:

  - Note: Put all of the documents that members need access in one folder and giving them access to that top-level folder.

- Slack Channel Name(s):

- Team Meeting Notes Doc:

Team Norms

Norms are important to create a sound team structure. Make norms explicit so it is easier for everyone to be successful and to enable the team to decide if a behavior is or isn't important. The best norms are observable behaviors that directly support the team's purpose and the threats and opportunities the team faces in their work together. The team should have only 3-5 norms because it's challenging to remember and apply more than that.

- Norm 1

- Norm 2

- Norm 3

What will the team do if a norm is violated?

If the team doesn't self-correct, the new norm will be that breaking team agreements is ok. The correction should be perceived as restorative, not punitive.

Communications Protocols

Team should address the following questions, as well as additional questions at the team's discretion:

- When and with whom are documents shared?

    ○

- When and how do volunteers contact the manager/lead?

    ○

- When and how are projects assigned?

    ○

- How conflict between team members should be managed:

    ○

Schedule

- 1:1s between member and team lead (starting date and time as well as frequency of 1:1s):

    ○ Team Facilitator: [Name, email address, phone number]

    ○ Team Coordinator: [Name, email address, phone number]

    ○ Data Lead: [Name, email address, phone number]

    ○ Logistics Lead: [Name, email address, phone number]

    ○ Recruitment Lead: [Name, email address, phone number]

    ○ Training Lead: [Name, email address, phone number]

- Group progress reports (starting date and time as well as the frequency of reports):

    ○

- Group work blocks (starting date and time as well as the frequency of work blocks):

    ○

- What to do if a deadline or target may be missed:

- Team lead's office hours:

Our Goals

In the next three months, we will:

-

Before our next meeting, we will:

-

Date the charter was created:

People present for the charter creation:

Last updated:

Date to review and revise the charter: [Choose a date six to twelve weeks after the team launch to review the charter and revise based on the experience of whats worked and what hasn't.]