Chartering Cheat Sheet
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MODERN AGILE

Chartering is a continual practice of defining and aligning on desired outcomes, the community needed to achieve those outcomes and the agreements by which people in the community will collaborate harmoniously.
-- Joshua Kerievsky

The Charter is the official container for the community's shared understanding and agreements. *--Joshua Kerievsky & III*

The Purpose of Chartering
Chartering helps establish expectations, aligns the perspectives of all involved players, and secures commitment for the successful completion of important work. *--III*

Chartering helps people understand their
- *Purpose*: inspiration and meaning for the initiative. Why are we doing this?
- *Alignment:* who's part of the initiative, what are their explicit shared values/principles, agreements and alliances?
- *Context*: the need(s) being fulfilled by the initiative, key constraints, boundaries and interactions, committed resources and time commitments.

-Adapted from Diana Larsen and Ainsley Nies.
Liftoff: Start and Sustain Successful Agile Teams.

Chartering Is Continuous
Revisit your charter regularly for best results.

Elements of a Charter
Purpose, alignment and context are realized through the following elements of a charter:
- *Vision* - (from Latin vīsiō "vision, seeing") The desired future state (e.g. a world without Alzheimer's disease).
- *Mission* - How the vision will be achieved. What will you make/do to realize the vision?
- *Objectives* - A statement that indicates a measurable, time-limited goal, framed in a binary manner. Objectives define specific, pass/fail goals to achieve the vision and mission by a given date.
- *Community* - the people necessary for the success of the initiative. Includes authorizing players, everyday team members, managers, customers, specialists (e.g. a lawyer), etc.
- *Community Agreements* - explicit agreements about how people in the community will work together, including *Working Agreements* (e.g. "working hours will be 10am-4pm"), *Designed Alliances* to create culture on purpose (e.g. "we will actively listen to one another") and *Values/Principles* that guide, direct and reward behavior (e.g. quality, speed).
- *Committed Resources*: the money, time, tools, services, training (etc.) necessary for the successful completion of the work.
- *Boundaries & Interactions*: An unambiguous view of what's inside and outside the community that helps us understand limits of responsibility and authority.

When To Charter
At the commencement of an initiative, when you gain/lose a community member, when you add/remove agreements/alliances/values, when you learn something new about your purpose, alignment or context.

With Whom Do We Charter?
Chartering is best done with as many people from the community as possible. You'll gain valuable insights about your vision, mission, objectives (etc.) when you include people like potential customers, gold owners (those who fund the initiative) and authorizing players (those who decide whether the work is acceptable and whether you can continue working).

Crafting A Vision
A great vision is usually one short sentence and describes a future state as if it already happened. Great visions are memorable and inspiring. Consider what would Make People Awesome and describe that future. A vision may be hard to achieve yet still within reach of the right community.

Crafting a Mission
A good mission is a clear statement about what you'll make or build to achieve your vision. It

provides focus by helping you understand what's out of scope and direction by clarifying what the community must accomplish.

Vision & Mission Confusion
A common mistake is to craft a vision that is actually a mission. A vision defines a future reality (e.g. "the world's most beloved airline") while a mission is an action-oriented plan to achieve the vision ("Create an intuitive flight booking system, offer excellent prices and provide the world's best customer service.").

Writing Good Objectives
Good objectives are specific, time-based and measurable. In 1961, President Kennedy authored this excellent objective: *send a person to the moon and return them safely by the end of the decade*. The word *objective* comes from the Latin verb jacere, "to throw". We "throw" an objective out in the future and manage the present to achieve it. Another excellent example: *iTunes will register at least 1 million song downloads during its first month in production.*

Do You Have the Right Community?
Assembling the right community is essential for achieving your vision, mission and objectives. It may be better to not commence work until the right community is established. Alternatively, you'll need to steadily grow the right community as part of the work.

The Community is *ALWAYS* Bigger Than You Think
The community is a population of people that effect the work or can be affected by the work. *It's always bigger than you think*. A member's involvement need not be (and rarely is) defined by proximity. Each is defined, rather, by their influence and their ability to influence the outcome. *--David Schmaltz*

The primary issue facing every initiative is the lack of awareness of its own community-ness. That's why the first steps are well focused upon increasing this awareness within the community. *-David Schmaltz*

Community Time Commitments
When getting agreement on the amount of time people are able to dedicate to the initiative, make commitments concrete. It's okay to say "I can commit 0 time" or "I can commit 1 hour per week." What's not okay is "As Needed" which translates to "Spend time tracking me down, but I'll never be available when you need me."

Example Working Agreements
"We will use one shared calendar"
"We will respond rapidly to our customers."
"We will use a kanban board to track work."

Example Design Alliances
"We will revisit/review our alliances when we fail to uphold them."
"We will ask for help and ask how I can help"
"We will walk the agile talk"
"We will hold this engagement with care."

Community Values/Principles
Great values or principles help guide a community's decisions and behavior. Example: A group previously tired of doing shoddy rushed work made "pride" one of their guiding values because they wanted to be proud of their work. Have no more than 5 values/principles and refer to them regularly.

Boundary is Everything
What's out is often as important as what's in.

"The sense of boundary is really one of authority and accountability. For an initiative, there must be a territory within which the community has control and responsibility, and outside of which they must take questions and decisions to some other source for answers and choices."
- Joshua Kerievsky & lll

Committed Resources are Key
A resource is something (not someone) used to achieve a goal. When we *commit resources* we negotiate and make commitments to provide the necessary money, time, tools, training, etc. needed by people to achieve the vision, mission and objectives.

Make sure you secure agreement to re-negotiate when there is any failure to make the Committed Resources available.
- Adapted from Charters and Chartering: Immunization Against Foreseeable Project Failure

Updates to this Document
This is a living document. Find the latest updates at: http://modernagile.org/chartering