BCIT RESPECT, DIVERSITY AND INCLUSION

Creating team and project charters

What is a team charter?

A team charter is a document that serves as a guide or roadmap for how a team will work towards a shared mission. It can clearly outline the roles and responsibilities of those on the team, expectations for behaviour and communication, along with the process and procedures for completing work in an effective manner.

Having clearly outlined roles, responsibilities, and expectations for behaviour and communication can be beneficial by reducing confusion, miscommunications, and assumptions which can often lead to conflict. It can also be very helpful in onboarding new team members and ensuring everyone is working collaboratively towards a shared goal.

Any team, big or small, such as a business unit or classroom of students, can benefit from a team charter. A team charter can be created anytime, whether it be during the formation of a new team or for an existing one.

What is a project charter?

Similar to a team charter a project charter can set out roles and responsibilities, as well as expectations for behaviour and communication. However, unlike a team charter, a project charter also addresses the terms for completion of a project. As such it will typically set out the specific tasks, timelines, and responsibilities assigned to each project member. A project charter can be very helpful for students working on group projects.

Who creates the charter?

The charter is created collaboratively by the people working on the team or project. Of course, some parts of the charter, such as the overarching goals or timelines may be set by outside parties, such as a manager or instructor. Likewise, there may be some direction provided by these leaders and/or applicable policies that must be adhered to. However, this still leaves room for the individuals to work together to agree to the details of how the work will be completed. All of the individuals involved in the team or project should be included in the creation of the charter.

It is important to note that a charter can be revisited and adjusted with the group members' consensus and as such is a living document.

BCIT campuses are located on unceded Indigenous land belonging to the Coast Salish peoples, including the territories of the xʷməθkwəy̓əm (Musqueam), Sḵwx̱wú7mesh (Squamish) and Sḵwx̱wú7mesh (Squamish) Nations.

What can be included in a charter?

Below, are suggestions as to what topics or information may be useful to include. However, these suggestions may not be applicable for every situation. Adjust what is included, and the amount of detail to make it helpful.

- Team goals and objectives
- Team reporting structure, roles, and general responsibilities
- Operations (i.e. procedures or process regarding)
    - Decision making
    - Communication and how folks prefer to be communicated with
    - How folks want to communicate with one another if conflict arises
    - Meetings
    - Respectful behaviour and providing feedback
    - Resources/budget allocation if applicable

In addition to the above, for a project charter use a SMART goal format to identify the specific tasks that need to be completed in order to achieve the final project results. SMART goals are = Specific, Measurable, Achievable, Relevant, and Time-bound.

How is a charter created?

There are many ways that groups can work together to create a charter. One way is to use the following process.

1. Share this document or other resources about team and project charters with team members.

2. Schedule a meeting to work on the charter. This is best done by meeting together (either in person or video meeting) as opposed to email.

3. Provide the members some general questions to consider in advance of the meeting that can be discussed in order to elicit information about what should be included in the charter. Examples of questions can include:

    a. What is not open for debate, or must be adhered to? For example, there may be project requirements or deadlines assigned that are non-negotiable, or job descriptions, collective agreements, policies etc.
    b. What is the overall goal or objective of the team or project? This will be based upon the project assigned or department's strategic goal.
    c. Consider how decisions could be made going forward. In some cases, a group will have an existing leader such as a manager for a department who would naturally provide direction. In other cases, a working group or student group may consist of peers of equal authority. The group will need to decide if they should choose a leader, or if decisions will be made by consensus, or vote.
    d. What do you expect from team members? What do you need from others to work successfully? What actions or behaviours will negatively impact you? What obligations do team members have to one another?

e. How are tasks to be divided up and assigned?
f. How could work product and related communications be shared? E.g. How will work be stored? Email? Shared folders?
g. How will meetings work? Frequency? Who will chair the meetings? Will there be an agenda? Will there be a minute taker? What are the expectations for attendance?
h. How can feedback on work product or behaviour be shared? How can challenges or disagreements be addressed? When should concerns be raised with the whole group versus individually?

4. When considering what you want in your charter consider your previous work on teams and think about issues that caused problems or conflicts. Consider how those issues could be avoided by setting out expectations in advance. Also, share with your group what has worked well in the past.

5. Consider using one of the templates below to assist with the drafting of your charter.

Team Charter – Template

Suggestions and examples for discussion and consideration when creating a charter.	**What has the team agreed to?**
Clarify the overall goal	
What the mission/objective of the team? Consider short- and long-term objectives.	
Align with strategic objectives.	
Be concise, i.e. think one or two sentences.	
Describe the team structure	
List each role/position.	
Include the duties/responsibilities of each or attach job descriptions.	
Include the reporting structure.	
Decision making	
What are the parameters of this charter, and what falls outside the charter? Clarify matters that are not open to negotiation (e.g. policies, job descriptions, collective agreements).	
Will the remaining decisions be based on consensus? How are disagreements on how to proceed resolved? Who is involved? E.g. Whole team or manager? If a consensus can't be reached will the members vote?	
Communication plans	
What are the agreed-upon default methods of communication for those on the team?	
When are meetings needed versus other forms of communication?	
What is the expected time frame for a response to messages or emails?	

Team meetings/Check-ins	
When, where (method) will team meetings or check-ins occur?	
Clarify the format and responsibilities. Who sets the agenda, chairs the meeting, takes minutes?	
What are expectations for attendance? If someone can't make a meeting or deadline who are they to notify and by when?	
Budget/Resources (if applicable)	
Clarify the general process for handling budgets/decision making.	
Respectful Communications	
Ensure everyone is aware of their rights and obligations related to BCIT's Harassment and Discrimination Policy 7507.	
Agree that there will be no yelling, name-calling, or personal attacks and that that criticism of others will not be shared publicly or on social media.	
Commit to not making negative assumptions about the intent of others, and instead agree to ask curious questions when their expectations aren't met.	
Members may agree to read this document on providing effective feedback.	
How will members proceed if they have a concern with the behaviour or work product of a group member? e.g. agree to first approach that person directly to share their concern, if the person feels safe doing so.	

Project Charter – Template

Suggestions and examples for discussion and consideration when creating a charter.	What has the team agreed to?
Clarify the overall goal	
What the goal of the project?	
Be specific in describing the desired outcome.	
Include date of completion.	
Be concise, i.e. think one or two sentences.	
Decision making	
What are the parameters of this charter? What falls outside the charter? Clarify details that are not open to negotiation (e.g. due dates set by instructors or other limits).	
Will the remaining decisions be based on consensus? How are disagreements on how to proceed resolved? If a consensus can't be reached will the members vote? Or will the team elect a leader to make final decisions?	
Communication plan	
What is the agreed-upon method of communication for the project? (e.g. email, group chat, other)?	

Include relevant contact information for each group member.	
What is the expected time frame for a response to messages or emails?	
How are documents shared, stored, and worked on?	
Team meetings/Check-ins	
When, where (method) will team meetings or check-ins occur? (Schedule these in advance).	
Clarify the format and responsibilities. Who sets the agenda, chairs the meeting, takes minutes?	
What are expectations for attendance? If someone can't make a meeting or deadline, who are they to notify and by when? Would the meeting be rescheduled or proceed as scheduled?	
Budget/Resources (if applicable)	
Clarify the general process for handling budgets/decision-making.	
Roles and responsibilities	
Consider the individual tasks that need to be completed to reach the goal.	
For each task use the SMART method to describe it. i.e. The tasks should be specific, measurable, achievable, relevant, and timebound.	
Assign each task to an individual.	
Respectful Communications and Feedback/ rules/conflict resolution	
How will a review of work and feedback be provided to each other? Consider the method, timeframes, and who is involved.	
Ensure everyone is aware of their rights and obligations related to BCIT's Harassment and Discrimination Policy 7507 and Student Code of Conduct.	
Agree that there will be no yelling, name-calling, or personal attacks and that criticism of others will not be shared publicly or on social media.	
Commit to not making negative assumptions about the intent of others, and instead agree to ask curious questions when their expectations aren't met.	
How will members proceed if they have a concern with the behaviour or work product of a group member? e.g. agree to first approach that person directly to share their concern, if the person feels safe doing so.	
Members may agree to read this document on providing effective feedback.	

Resources

- Developing a team charter – University of Regina
- Making group contracts – University of Waterloo
- Teamwork Skills: Being an Effective Group Member – University of Waterloo