

ESTABLISHING A TEAM OR TASK FORCE CHARTER

Why is having a Charter Important?

One of the barriers standing between Hope and its potential in ministry is engaging volunteers to make things happen. This isn't a new challenge. As far back as 1994, long range planning efforts noted the following:

Cultural changes in work patterns have impacted the ministry of congregations. We repeatedly hear the following comments:

1. People's time is valuable.
2. People are willing to give their valuable time to the congregation when they see there is a need and feel they are making a worthwhile contribution.
3. This has meant it is easier to solicit volunteer involvement for time limited tasks than ongoing committees.
4. The effective use of volunteers is dependent upon the clarity of the task, the opportunity to get to know others while carrying out that task (community building), and the availability of resources and leadership necessary to carrying out the ministry.
5. There are many tasks for which we have a difficult time finding volunteers or tend to depend upon the same persons, many of whom find it difficult to continue to serve.
6. There continues to be a lack of clarity regarding the relationship of staff responsibilities to the work of volunteers.

It is far easier to start teams or task forces off on solid footing when members have an understanding of what the group is in place to do, how the group contributes to the big picture, and what is expected of individual participants whether staff or laity.

A charter is also a useful tool for recruiting new members into the mix. A charter brings credibility to the work the group is tasked with completing. Some tasks require minimal investment in time and effort; others can be intense and challenging. A charter helps prospective new recruits understand what they would be committing to if they choose to participate.

An important charter benefit related to group dynamics revolves around conflict management. Should disagreements among group members arise in the process of carrying out the group's work, a well-crafted charter offers an objective reference for how the group agreed to interact with each other and make decisions.

Some Things to Keep in Mind...

- While you may be able to draft a charter in one meeting, don't be surprised if it takes more time to flesh out. It may require people to gather further information.
- Charters do not need to be hefty documents. Use your judgment on what makes sense in terms of the scope, complexity and importance of the team / task force output.
- The time invested in this process will pay off down the road, so resist the urge to simply check this off your list and get on with the work.

"Time spent collaboratively building a charter will be repaid in reduced frustration, improved productivity and better results."

Kevin Eikenberry, a leadership expert and the Chief Potential Officer of the Kevin Eikenberry Group, a learning consulting company.

What is a Charter?

It is a document describing a group's purpose, boundaries and agreements as to the way people will work with one another. It is co-created by the group's sponsor or leader and those who will serve on it. The power of this tool comes from the discussion and agreements reached by the group in the process of drafting the charter.

What should be Included When Drafting a Charter?

Solid team charters address goals, responsibilities, the mechanics of the team, etc. Following are some questions to spur discussion and thoughts regarding key components in a well-drafted charter:

- Purpose and Alignment with Hope's Vision and Values.
 - Why is this team or task force being formed?
 - What purpose does it serve? What challenge, issue or opportunity does it address?
 - How is the work of this team or task force in alignment with the Hope's Vision and Values and the larger goals and strategies of the Vision & Governance Board?

- Goals and Expectations.
 - What are the specific goals for the team or task force?
 - Who are the recipients of the work being done (i.e., the stakeholders)? What are their needs or expectations?
 - What obstacles or challenges can be seen at the start?
 - How will the group know its work has been completed?
 - For ongoing groups, how will it address long-term or changing goals?

NOTE: Effective goals are clearly stated with measurable outcomes and concrete timelines.

- Roles and Responsibilities.
 - Who is the Team / Task Force Leader? What is their role?
 - Who is responsible for facilitating, meeting logistics, and managing information?
 - Who is responsible for communicating progress to the various stakeholders on the receiving end of the group's work?
 - How will each person be involved in decision making?

- Approach.
 - When will the group meet?
 - What are the ground rules that the group agrees to?
 - How will the group make decisions?
 - How will the group hold each other accountable for these things and for task completion?

- Skills and Expertise Required.
 - What skills and expertise are required for the group's success?

- Who on the team can provide these skills and perspectives?
- Are there gaps in required skills or experience? How might these skills be attached to the group through other resources? (This doesn't necessarily mean adding more team members – it could mean identifying and tapping into subject matter experts at the appropriate points in time.)
- Resources Needed.
 - What budget of time and money will be needed?
 - What other resources will be required for success?
- Authority.
 - What level of authority on spending does the group have?
 - What level of authority on other resources does the group have?
 - What approvals are needed and by who?

Now that the Charter has been Drafted, What Do I Do with It?

- If you really want to cement the agreements the group has made and pave the way for making it easier to hold people accountable, each member of the group should sign the charter. This signifies commitments to each other.
- Provide a copy (preferably electronic as well as hardcopy) to each member of the Vision & Governance Board. This heightens leadership awareness and understanding of the activities underway at Hope.
- Keep the document fresh by referring to it in meetings, making sure that you stay on track with the boundaries and guidance it offers.
- As circumstances change or focus needs to shift, engage the group in making adjustments to the charter and getting agreement from group members and sponsors.
- Find ways to acknowledge volunteers' efforts in the achievement of milestones defined by the group.