

Chartering the Team

Chartering is the means of empowering team members, both individually and collectively

Chartering the Team Table of Contents

- Background
- Developing Project Teams
- Stages of Team Development
- Stage 1: Chartering the Team
- Stage 2: Building the Team
- Stage 3: Sustaining the Team's Performance

Background

- Chartering a Project Team is part of the CH2M HILL Project Delivery System (PDS)
 - Project Delivery System: Fourth Edition, 2001 ISBN 0-9652616-0-3 www.ch2mhill.com/projectdelivery
- Teams are an integral part of the Information and Communication Technology (ICT) Balanced Scorecard strategic objectives
 - E1 – Build a High Performance, closure oriented culture
- Teams and Team Building process are an evolutionary process for ICT:
 - Chartering is a critical starting point
 - Re-chartering of teams is a common occurrence in an evolutionary process.

Developing Project Teams

- Project delivery is a “team” activity
- Teaming provides flexibility and creativity into ways the greatly increase our ability to deliver value-added projects to our customers.
- This presentation:
 - Describes the three elements of Teaming
 - Chartering
 - Building
 - Sustaining
 - Provides details of the Chartering process

What is a Team?

- A team is a group of people who work for a common purpose to produce a specific outcome.
- In the project delivery context of ICT @ CH2M HILL/RFETS, the “project team” consists of:
 - Key staff members
 - A project “score keeper”
 - A project “spokes person”
- The team uses a standard set of processes to develop and deliver the desired products and services.

Chartering the Team

- The Project Portfolio Management Team and Team Members charter the team and build it into an effective work system.
- The Team Members and their Coaches sustain a high level of team performance throughout the project.
- The Customer, Stakeholders, and ICT Management interact with the Team Members and their Coaches during the course of the project to define requirements and receive specific components from the team's efforts.
- Even though, The Customer, ICT Management and, the Stakeholders are not members of the team they are members of a broader definition of the "team" and are involved in certain functions of the teaming process.

Why Charter the Project Team?

- Achieve high-quality performance
 - Define clear goals
 - Establish initial agreement regarding purpose, individual agendas, address interpersonal conflicts, assignment of resources, and clarify expectations
 - Produce a shared vision of the project
 - Create team behaviors that are stronger than individual behaviors
 - Establish operating guidelines that govern team and individual behaviors
 - Set the stage for success

Why Charter the Project Team?

- Empower team members. Staff is “empowered” when they have been given a clear understanding of:
 - Desired results
 - Parameters within which the results are to be accomplished
 - Resources available to help achieve the desired results
 - Expected standards of performance
 - Consequences associated with various levels of performance

Why Charter the Project Team?

- Monitor performance
 - Charter contains a baseline against which the team can assess its performance on an ongoing basis.
 - Teams can know they are not achieving at their desired level.
 - Teams can recognize when they are faltering and can implement the self-correcting mechanisms to resolve problems
 - Charter provides the foundation essential for
 - monitoring performance
 - Diagnosing problems
 - Evaluating and implementing solutions

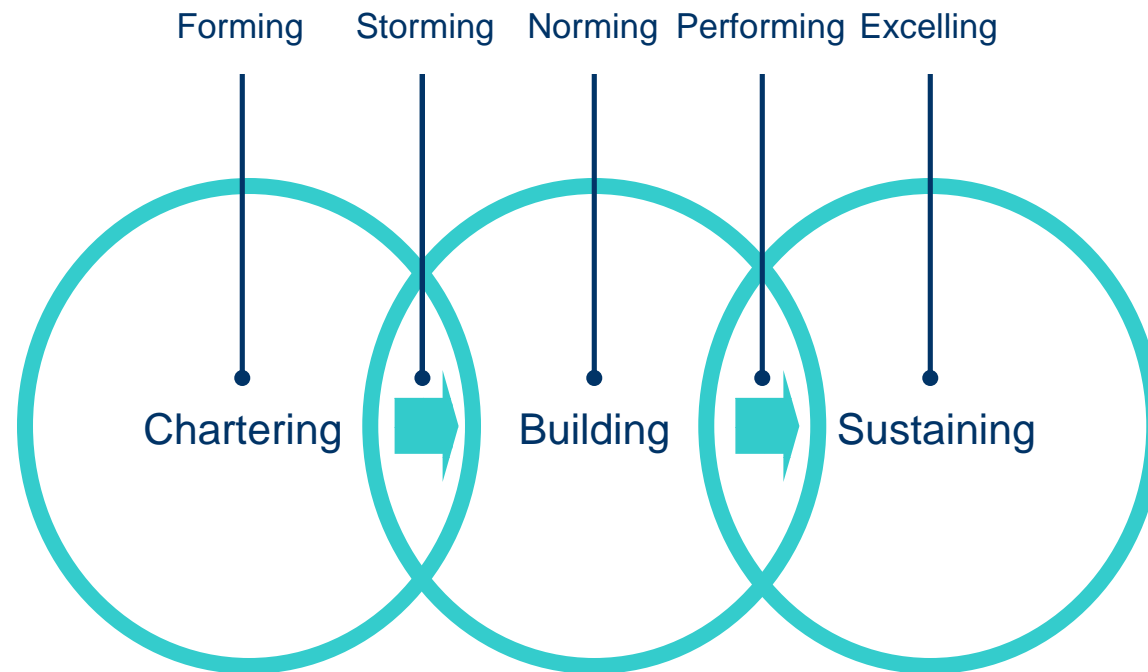
Chartering the Team

- Project planning is the single most important activity that will influence the success of the project.
- Planning is divided into three (3) essential components:
 - Charter the project team
 - Plan the project
 - Endorse the project

Stages of Team Development

- A common, agreed upon set of goals, measures and rules
- A commitment to the required goals and tasks and to each other
- Interdependent work: each person's work linked to the others
- Collective and individual accountabilities
- Acceptable team behaviors
- Adequate resources to perform the work as a team

3 Stages of Team Development Process



Stage 1: Chartering the Team

- Chartering is the “act of guiding the team through the process of defining itself”.
- Its:
 - Purpose
 - Scope
 - Goals
 - Roles
 - Responsibilities
 - Behaviors
- “Charter” is borrowed from the British, where the sovereign granted or chartered certain rights or privileges to an individual.

Elements of the Team Charter

- Vision
- Purpose
- Membership
- Mission
- Organizational Linkage
- Boundaries
- Team and Individual Responsibilities
- Measures of Success
- Operating Guidelines

Vision

- A statement of the larger purpose of the project
 - “Why does this project exist?”
 - “What is it expected to do?”
- Framed in terms of the future state that exists as a result of the project.

Purpose

- The purpose answers the questions:
 - “Why does this team exists?”
 - “Why is it formed?”
 - “What is it expected to do?”
- Purpose should be stated in a single sentence or short paragraph.
- Typically derived from the project definition as it appears in some form of a contract.
- Closely linked to the Project Vision

Membership

- Membership is not just providing expertise
- Membership carries with it defined responsibilities and a degree of commitment to the team and to the team members.
- Membership must be clear:
 - Individual must know when they are on a team
 - What the scope of their membership is in terms of roles, responsibilities, and length of commitment

Mission

- Mission is an extension of the team's purpose.
- It expands the purpose, with a broadly measurable result.

Organizational Linkage

- Is a description of the formal link between the team and the enterprise.
- It answers the questions:
 - “To whom does the team report?”
 - “Is the team part of a formal structure?”
 - “How does the team relate to that structure?”
 - “How is it linked for purposed of resources, communication, authority, and approval?”

Boundaries

- Define the scope of the project team's formal authority.
- Define the area of influence or what it may do with permission.
- Describe the shared responsibilities or areas in which team members are expected to initiate action to support others.
- Define the limits of the project team's authority.

Team and Individual Responsibilities

- Define the scope of primary responsibility
 - Responsibilities held by the entire team
 - Each team member is equally responsible for their attainment
- Each member also has responsibilities
- Overall responsibilities are reviewed and measured by individuals who can represent the customer and the enterprise's management
- Individual team responsibilities are typically reviewed and measured internally by the project manager and other team members.

Measures of Success

- Must not be subjective or unclear.
- Must be defined in terms of specific results that are measurable against agreed-upon criteria.
- May be established in terms of quality, quantity, time, cost, or a combination of these criteria.
- The greater clarity of the criteria, the greater the probability that the team members, individually and collectively, will achieve them.

Operating Guidelines

- Describe how the team will govern itself.
- Are created to answer the questions:
 - “How will the team make decisions?”
 - “How will the team communicate internally and externally?”
 - “How will it resolve conflict?”
 - “How will it make change?”

Stage 2: Building the Team

- Four major areas of skill development are focused on building the team:
 - Problem solving skills
 - Process improvement skills
 - Interpersonal skills
 - Decision making skills

Problem Solving Skills

- The must identify and solve problems encountered during the project delivery process.
- Problem solving skills involve a wide variety of techniques and tools

Process Improvement Skills

- The Charter and the Work Plan “may” appear to be complete when first developed and delivered to the Customer, Stakeholders, and Management.
 - Inconsistencies, redundancies, and other flaws will surface
- Process improvement is an essential part of the team’s daily work as well

Interpersonal Skills

- Team must analyze their behavior against the following “rules of conduct”
 - Team goals are higher priority than personal goals
 - Base decision on what is right not who is right
 - No inequity among the team members, all contribute and listen
 - Flexibility is critical, no fixed positions
 - Decisions based on facts and good judgment, no opinions or generalizations
 - Perfection is the enemy of the common good
 - Strive for consensus not unanimity

Stage 3: Sustaining the Team

- Three major capabilities must be in place in order for the team to sustain its performance:
 - Diagnosis of performance
 - Performance against project goals and expectations
 - The team member's contributions to meeting these goals and expectations
 - The Customer, Stakeholder, Coach, and Management assessment of the performance of the team
 - Evaluation and feedback
 - Corrective actions