

## Charter Your Group to Success

An important step sometimes ignored in the rush to get a group up and running is to create a charter or a statement of responsibilities for the new ‘team’ you are bringing together. This simple, yet powerful tool is a good way to, literally, get everyone on the same page so you can manage expectations.

Those of us in who work in the public sector are generally blessed with constituents who are enthusiastic about our work; even though this can feel like a mixed blessing when members of the public want to challenge our decisions. But generally, working with the various stakeholders is beneficial for everyone. As the call for collaborations between public-sector organizations and citizens and other agencies increases and with the increased demand for transparency in decision making, there is an increasing use of task forces, work groups, advisory groups, and other kinds of collaborations. Despite the enthusiasm and motivation of these groups and despite the commitment of agencies to “listen to and involve our publics,” many of these efforts do not go well. One of the most common reasons is that people forget, or maybe never knew, precisely why their group was established and what their role is.

Unclear expectations is a sure fire formula for failure. An unguided group will drift toward an assumption that they are decision makers-effectively making important ‘terms-of-reference’ decisions for you. It is always best to spell out the group’s authorities, limitations, and your expectations up front.

Although it sometimes works to involve group members in defining the details of the charter, it is generally best for the sponsor of a group, which typically holds the final responsibility and authority for ultimate decision making, to provide the charter which then acts as side boards for group involvement and action.

The terms and conditions should obviously be tailored to the specific situation and circumstances. However, you should consider spelling out in the charter the following,

1. Purpose. A clear, direct statement of why you are setting up the group.
2. Specific objectives. More detailed statements, as needed, to clarify what will be done.
3. Authority. It is good to state the agency’s authority for having such a group and reiterate that the

agency/commission has final decision-making authority.

4. Expectations. This is where you spell out something akin to a ‘scope of work’ for the group/project (i.e., define the specific ‘deliverables’ you expect from your group).
5. Time Frame. Some groups are on-going, but usually there are known or intended beginning and ending times. Spell out time limitations.
6. Roles and Responsibilities. This is where you provide clear statements of who is in the group and what they are to do. Separate sections may address (a) group members, (b) the agency, (c) the facilitator/contractor, if one is used, (d) technical experts and (e) others, as needed.
7. Funding and Support. Lay out who pays for what and how payments are made.

8. Process. If there are any restrictions or preferred process steps the group should use (e.g., public hearings) make sure these are identified.

Providing, reviewing, and discussing the Charter at the very first meeting-or even providing it as part of the background information when recruiting participants-is one of the best ways to get your group started on the right track-and keep them there.

Should they wander, being able to remind the group of the ground rules contained in its Charter is a respectful way to get them re-focused on the appropriate tasks. Everyone works better and smarter when there is an up-front statement of the rules of the game—a clear statement of roles and expectations—a charter.