

Charter Template

For more information contact us at FamilyFirstChapin@Chapinhall.org.

Purpose and Intended Use

- This resource is designed to support the development of Charters to guide the work of Family First implementation teams and workgroups and promote shared accountability among participants.
- While Charters can be completely co-created with group participants from a blank template, this process can take considerable time and require multiple meetings. It is often more expeditious to present draft language as a starting point and the implementation team or workgroup can revise/refine the content as needed.
- This resource provides guidance and suggestions for navigating this process.

Charter Instructions

To streamline the charter process, the lead(s) are strongly encouraged to complete the following tasks prior to the first Implementation Team or Workgroup meeting:

1. Draft the **charge** of the group under the purpose heading so workgroup members have something to respond to during the first meeting. Be willing to rewrite the draft language if it does not resonate with members.
2. Draft the **goals** reflecting what this group is coming together to accomplish.
3. Populate the **membership table** in advance with known participants. Explore early and often which perspectives or expertise are missing from the discussion, with an intentional focus on promoting diversity in representation and the contributions of persons with lived expertise.
4. Draft **roles** for workgroup members or have each member draft a sentence that describes their role in the group.
5. Identify and draft **deliverables or work products** for which the group is responsible. If the goals addressed this area, this section can be removed from the charter.
6. Engage the group in a discussion regarding **decision-making**. Fist to 5, or thumbs up, sideways, or down are good consensus building methods.
7. A regular and consistent **meeting** schedule is critical. Have a few options that work for you ready to share with the group during the first meeting.
8. It is critical to know in advance who your group is responsible to, who progress needs to be shared with, and where feedback goes and how it will be returned. Have the **duration and sustainability** sections drafted in advance to share with the group.

Membership

Team Lead(s):

Team Members			
Name	Agency	Role	E-mail

Common Roles and Responsibilities for all Members

- All members share updates and feedback with their respective division and colleagues or other meeting structures
- Commit to holding ourselves accountable (using the communication tools and processes with fidelity)
- Commit to attend all meetings relevant to your area of expertise unless there are extenuating circumstances which have been communicated in advance to the Team Leads
- Install all necessary Implementation Drivers and follow the phases of Implementation
- Operate transparently
- Make data-based decisions and recommendations
- Respect each other's ideas, provide constructive feedback, and have balanced participation
- Seek permanent sustainable solutions

Individual Roles and Responsibilities

Role	Responsibility

Deliverables & Work Products

Identify and draft ***deliverables or work products*** for which the group is responsible. *If the goals addressed this area, this section may be removed.*

Decision-Making Process

Engage the group in a discussion regarding ***decision-making***. *Fist to 5, or thumbs up, sideways, or down are good consensus building methods.*

Meeting Schedule & Process

- In-person or virtual
- Frequency - TBD
- Attendance at all meetings where area of expertise and report out on tasks is needed
- Designees are identified in the charter if warranted
- Administrative support - TBD
- Action items will be identified and shared with all members post convening

Standardized Communication Tools

- Agendas organized around a set of Desired Results
- Charter
- Implementation Work Plan
- Action Items

Duration & Sustainability

It is critical to know in advance who your group is responsible to, who progress needs to be shared with, and where feedback goes and how it will be returned. Have the *duration and sustainability* sections drafted in advance to share with the group.

Finalizing the Charter

- After group members have sufficient opportunity to provide their feedback and suggested edits verbally or in writing, circulate a final, updated copy to the group for approval.