The Team Charter Assignment: Improving
The Effectiveness of Classroom Teams

Pamela L. Cox
Cazenovia College
Paula E. Bobrowski
State University of New York (SUNY) at Oswego

Abstract

With the trend in recent years for business decisions to be made by teams rather than by individuals, many instructors have incorporated team learning into their classes. While the use of classroom teams has increased, few instructors have focused attention on improving their functioning. The "Team Charter Assignment" is one vehicle the authors have found useful for increasing classroom team effectiveness.

Introduction

With the trend in recent years for business decisions to be made by work teams rather than by individuals, many instructors have incorporated team learning into their classes. While the use of classroom teams has increased and group projects are many, few instructors have focused attention on improving the functioning of classroom teams. In fact, Rotfeld (1998, p. 6) in his classic piece "Hello, Bird, I'm Learning Ornithology" characterizes the use of classroom teams and the assigning of group projects as follows:

In reality, the way most faculty run (group) projects teaches writing, speaking, and the ability to work in groups the way talking with an exotic bird teaches ornithology. … group projects are many but few faculty assigning them give attention to improving student speaking, writing, or group interactions. The classes do not teach these things except by contagion and therein lies the real problem.

Among the problems experienced by student teams are the following: poorly defined goals and expectations, social loafing, mismanaged conflict, team member dissatisfaction, and poor communication. Used correctly, teams can increase productivity, raise morale, and in some cases encourage innovation (Dumaine, 1994, p. 87). The trick, then, is for instructors to not only expose students to teamwork but also to provide guidance and instruction in effective team management. The "Team Charter Assignment" is one vehicle the authors have found useful for increasing classroom team effectiveness.

Assignment Objectives and Rationale

Anyone who plays sports has to learn the rules. Anyone who learns to play an instrument has to learn the techniques. "How we do things here" are the ground rules. Teams often make assumptions about ground rules. Members believe that everyone knows how it should be and how everyone should behave. When someone else's behavior fails to conform to one's own

expectations, people tend to be surprised. Even more importantly, because the rules are not clear and because there has been no discussion as to how problems will be managed, unnecessary conflict follows. Research on teams indicates that teams need a variety of support and structural mechanisms in order to be successful, including explicit ground rules and set behavioral expectations (Walker & Martin, 1998; Katzenbach & Smith, 1993). In their study of work teams in over 30 organizations, Katzenbach and Smith found that effective teams develop rules of conduct at the outset to help them achieve their objectives and performance goals. Establishing ground rules can help to prevent social loafing and free-riding behaviors by providing assurances that free-riding attempts will be dealt with (Shepperd, 1993).

Setting ground rules at the outset of team formation may be critical to team effectiveness. Research by Gersick (1988) suggests that a group's first meeting may set lasting precedents for how the group will use its time. Feldman (1984) calls this phenomenon "primacy" and states: "The first behavior pattern that emerges in a group often sets group expectations" (p. 51). While group norms usually develop gradually and informally as group members learn what behaviors increase group effectiveness, it is also possible to short-cut the process by conscious group decision (Hackman, 1976). The primary objective of the team charter assignment is to "jump start" the development of group norms and to increase the likelihood that the first group behavior patterns that develop will aid rather than hinder team performance. Other objectives are as follows:

Provide students with a short but important task so that the team can learn to function quickly without a large portion of the course grade resting on the initial outcome.

Enable each team to develop and understand the rules of conduct expected of each team member.

Provide an initial opportunity for team members to get to know one another.

The Team Charter Assignment is appropriate for classes in a variety of disciplines and has been used by the authors in both lower and upper division courses including a principles of management course, an introduction to marketing course, organizational behavior, international business, and a course in advertising.

Assignment Description and Procedure

Team Formation

Prior to team formation, the instructor explains class expectations and group assignments. The class as a whole discusses the skills necessary for completing the group assignments. Class members then individually indicate the skills they have and those areas where they may be lacking (generally by filling out index cards). The instructor forms teams comprised of members with the complementary skills necessary to do the team's assignments. Research suggests that selecting team members for skill and skill potential, rather than personality, may increase team effectiveness (Katzenback & Smith, 1993) and reduce social loafing by making individual contributions seem indispensable (Sheppard, 1993). States Sheppard: "… when individuals

perceive their contributions as unique or as nonredundant with the contributions of others, they are likely to view their efforts as needed" (p. 74).

Team Charter, Name, and Logo

After the teams are formed, each team is required to submit a team charter (see Appendix I for a complete description of the assignment). The following issues (points) must be discussed and outlined in the charter: attendance, lateness, interruptions, work breaks, participation, behavioral norms, decision making, conflict management, sanction issues, and team member strengths and weaknesses. In addition to preparing a team charter, each team is required to create a name for the team and a team logo. The name and logo are expected to reflect an attribute that the team members believe is important. The team name and logo are submitted with the team charter and a brief explanation of the name and logo choice.

Assignment Variations

Team Journal

One of the authors has found it useful to require students to keep a team journal consisting of agendas and minutes from team meetings (see Appendix I). One study of TQM teams (Walker & Martin, 1998) recommended the following as beneficial for establishing a successful meeting structure: setting an agenda ("the beacon for effort"), establishing ground rules and behavioral expectations, and keeping a record of each team meeting. Requiring a team journal along with the team charter may help to increase the effectiveness of team meetings.

Team Charter Update

In response to feedback from students, a "Team Charter Update" assignment (see Appendix II) has been developed and used for the first time this year. Students suggested that the team charter might be made more effective by requiring students to revisit the assignment halfway through the semester, in order to ensure that behavior expectations were being met and were still valid. The following suggestion made by one student is representative of the feedback that resulted in the creation of the

Team Charter Update

Evaluate the team charter throughout the semester so that the team is reminded of it, and reminded to follow it.

Results

The authors asked students in four classes (n = 98) to evaluate the team charter assignment (see Appendix III for the evaluation and results). The majority of students (seventy-four percent) indicated that the team charter assignment was moderately to very useful and aided their team's performance. Seventy-five percent of the students felt that creating a team charter helped to clarify group goals and objectives and fifty-one percent felt the team charter helped to

95

increase attendance at group meetings. Eighty-five percent of the students found creating a team name and logo to be moderately to very useful. In the classes requiring a team journal, sixty-seven percent (n = 55) found the journal to be moderately to very useful. Students made the following comments when asked to explain the advantages of the team charter, creating a team name and logo, and keeping a team journal:

Team Charter

The team charter kept us on track with specific goals and a way to go about attaining them.

I knew that people would show up to the weekly meetings. I knew that people would do their part.

It (the team charter) was a resource for resolving group problems.

It sets boundaries. It outlined our expectations and gave us a base to work from.

(The team charter) provided expectations and goals up front so everyone knew what was expected of them.

Team Logo and Name

Gave the group unity.

Gave our team a personality.

Put us in the right frame of mind and reinforced the "team" feeling.

Was a symbol to refer back to and remind us of what we were about.

Added to the experience of being a team and gave us a symbol to be proud of.

Team Journal

It kept the group on track.

We had in writing where our team stood on assignments.

Gave evidence of accountability.

Motivated you to show up (at team meetings).

Criticisms of the Assignment

The major criticisms by students of the assignment were as follows:

The team failed to follow the ground rules set in the team charter or failed to refer back to the charter.

The team charter needed to be revisited partway through the semester.

Creating the team charter and maintaining a team journal was time consuming.

The Team Charter Update Assignment has been developed to address concerns 1 and 2. While the charter and journal take time to create and maintain, the benefits seem to outweigh the expenditure in time. In fact, many of the students felt that the team charter would be helpful in other classes. Stated one student:

If there is any type of group work, I now feel it is essential. I will never be in a group again without one.

Conclusion

The team charter assignment provides a support and structural mechanism for aiding team performance. Teams take time to establish the behavioral norms necessary for effective performance. The typical college semester often does not provide enough time for effective behavioral norms to develop. The team charter assignment provides the college instructor with a vehicle to "jump start" the process and to send signals about some central values key to effective team performance. In addition, by requiring the team charter in lower division courses, business schools can establish effective teamwork behaviors that may carry-over to courses in other areas. States Feldman (1984):

Many group norms in organizations emerge because individual group members bring set expectations with them from other work groups in other organizations. Such carry-over of individual behaviors from past situations can increase the predictability of group members' behaviors in new settings and facilitate task accomplishment (p. 52).

Students do not have to continually relearn effective group behavioral norms from class to class. Rather than learning effective group norms through contagion (like learning ornithology by talking to a bird), the team charter assignment provides a vehicle for providing instruction and guidance in team effectiveness.

Appendix I

The Team Charter Assignment

Getting started: Developing Ground Rules

Anyone who plays sports has to learn the rules. Anyone who learns to play an instrument has to learn the techniques. The rules of "how we do things here" (the etiquette of the situation, the appropriate behaviors) are the ground rules.

Teams often begin making assumptions about ground rules. Members believe that everyone knows how it should be and how everyone should behave. When someone else's behavior fails to conform to one's own expectations, people tend to be surprised. Even more importantly, because the rules are not clear and because there has been no discussion as to how problems will be managed, unnecessary conflict follows. This assignment serves the following objectives:

Gives you the opportunity to get to know your team members.

Provides a short but important task so that the team can learn to function quickly without a large portion of your grade resting on the initial outcome.

Enables each team to develop and understand the rules of conduct expected of each team member.

Each team will be required to submit a team charter. The following points that must be included in your charter are listed below, with some examples of the kinds of questions that might be addressed. However, use these as starting points; be sure to address any other important issues that come up in your discussions.

Attendance:

How often should we meet?

How long should our meetings be?

When is it OK to miss a meeting?

Lateness:

Since team meetings should start on time, how do we deal with lateness?

What does "on time" mean?

Interruptions:

How do we deal with interruptions?

98

What is allowed? Phone calls? Messages?

Food/coffee/smoking breaks:

Do we have food or coffee?

Who cleans up?

Do we allow smoking?

If not, do we have smoking breaks?

How many breaks should we have?

How much socializing is permissible?

Participation:

What do we mean by participation?

How do we encourage participation?

Are there group norms that we can establish to encourage participation?

Goals:

What are the team's goals and objectives?

What is the team's mission?

How will the team keep members motivated during the semester?

How will the team reward itself (and individual members) for a job well done?

Norms:

What behaviors are permissible?

How do we deal with inappropriate humor?

How do we deal with people who dominate, resist, are too quiet or noisy, etc.?

How will we monitor our progress?

What important roles need to be assumed by team members during the semester? How will these roles be assigned?

99

Decision making:

How do we make decisions?

What decisions must be agreed to by all?

What does consensus mean?

Conflict:

How will the team encourage positive/creative conflict and discourage negative/dysfunctional conflict?

How can the team encourage and manage differences of opinion and different perspectives?

Sanction issues (what will the team do with deviates?):

How will the team deal with members who violate the agreed-upon norms of the team? For example: how will social loafing or inadequate participation be dealt with?

Firing team members: what are the specific rules/criteria for firing a team member? (You must give two written notices to the person and a copy to the professor prior to dismissal.)

Team member strengths and weaknesses:

Each team member should be identified (name, phone #, e-mail) along with an assessment of his/her strengths and his/her areas for improvement.

Other:

Are there other issues that have a positive or negative impact on the team?

The Next Step: A Name and a Logo

After your team has prepared its team charter, create a name for your team and design a logo. The name and logo should be meaningful to the team, reflecting an attribute that the team members believe is important (humor is allowed and encouraged, but both the team logo and name should be meaningful). The name is limited to one or two words. Write a brief explanation of your name and logo choice. Give a copy to your instructor (along with your team charter) and put a copy in your team journal. Your team charter should also include the following:

A cover page with the following printed on it: the team name, team logo, team member names, and course name, number, and section.

A page with team member names, phone numbers and addresses.

Team charter rules and expectations.

A brief explanation of your team name and logo choice.

<u>Team Journal</u>

Each team will be responsible for keeping a team journal. Teams are expected to meet (outside) of class on a weekly basis throughout the semester. The meetings can last as long as you like but must include the following: an agenda, a meeting coordinator (the individual responsible for running the meeting and creating the meeting agenda), and a recorder (the individual responsible for recording minutes for the meeting). The coordinator and recorder roles should rotate among team members over the course of the semester.

The team journal should consist of the following: an agenda for each team meeting, minutes from each meeting, and a copy of the team charter. Team minutes should include the following:

The date and time of the meeting. Where the meeting was held. How long the meeting lasted.

Who attended the meeting.

Which group members were absent.

Name of the coordinator for the meeting. Name of the recorder.

Details of what was discussed at the meeting.

Details of what will be done before the next meeting (individual assignments) and who is responsible for each task.

The agenda that will be discussed at the next meeting.

The time, date, and place of the next meeting.

The names of the coordinator/recorder for the next meeting.

Appendix II

Team Charter Update Assignment

Objective: To critically reevaluate your team's charter in order to ensure that rules of conduct and expectations are still applicable and being adhered to by group members.

Procedure: As a group, evaluate your team's charter by discussing the following questions. Prepare a written document of your group's answers to the questions below.

Meetings. Are meetings too long? Not long enough? Does the group meet frequently enough to accomplish tasks? Is group member attendance adequate? Why or why not? What could be done to increase attendance at meetings? Are group members arriving to meetings on time?

Socializing. Does the group socialize too much during meetings? Not enough? Have group members made an effort to get to know one another? Why or why not?

Participation. What is the level of participation in your group? Does every group member communicate? Who talks the most? Who talks the least? What can be done to encourage greater participation on the part of all group members?

Objectives and goals. Are the group's objectives and goals being met? Why or why not? What could be done to increase the likelihood of meeting goals and objectives?

Behavioral norms. What are some of the group behavioral norms that have evolved during the semester? What norms help the group to meet its objectives? What norms prevent the group from meeting objectives?

Decision-making. How are decisions made by the group? Are decisions agreed to by all group members? How can the group improve its decision-making?

Conflict management. How has the group dealt with conflict? Has conflict been a positive or negative force within the group? How might the group improve its management of conflict?

Team roles. What roles are assumed by members of the group? What roles need to be assumed in order to improve the functioning of the group?

What other suggestions or ideas do you have for improving the functioning of your group?

Appendix III

The Team Charter Assignment Evaluation

One of the first assignments you and your team were asked to do was the "Team Charter Assignment". We are interested in your evaluation of this assignment, whether you felt it to be effective, and how its effectiveness might be improved in the future. Please take the time to complete the following evaluation of the Team Charter Assignment.

On a scale of one to seven, how useful and/or helpful was the team charter assignment?

Not very useful   Moderately useful   Very useful

    1   2   3   4   5   6   7

Explain the advantages and disadvantages of the Team Charter Assignment:

Was the functioning of your team helped or hindered by the team charter? Explain.

What (if any) problems did your team experience during the course of the semester? Did the team charter help in the resolution of these problems? Explain.

Do you feel it would be helpful to have a team charter in other classes? Explain.

On a scale of one to seven, how useful was creating a team name and logo?

Not very useful   Moderately useful   Very useful

    1   2   3   4   5   6   7

Explain why you felt having a team name and logo was (or was not) useful or helpful.

Please respond to the following statements about various aspects of the team charter. Use the following scale in your evaluation and circle the number that most accurately reflects your feelings:

1-Strongly agree, 2-Agree, 3-Somewhat Agree, 4-Undecided, no opinion, 5- Somewhat disagree, 6-disagree, 7-Strongly disagree.

- The team charter helped to increase attendance at group meetings.   1 2 3 4 5 6 7

- The team charter helped to decrease lateness at group meetings.   1 2 3 4 5 6 7

- The team charter helped to increase member participation at group   1 2 3 4 5 6 7

meetings.

103

- The team charter helped to decrease social loafing. 1 2 3 4 5 6 7

- The team charter helped to clarify group goals and objectives. 1 2 3 4 5 6 7

- The team charter helped the group manage and deal with conflict 1 2 3 4 5 6 7

effectively.

On a scale of one to seven, how useful was keeping a team journal?

Not very useful   Moderately Useful   Very useful

      1   2   3   4   5   6   7

What were the advantages of keeping a team journal? Disadvantages?

What ideas do you have for improving the usefulness of the Team Charter assignment?

Team Charter Evaluation

Results

On a scale of one to seven, how useful and/or helpful was the team charter?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1.00	3	3.1	3.1	3.1
2.00	14	14.3	14.3	17.3
3.00	8	8.2	8.2	25.5
4.00	19	19.4	19.4	44.9
5.00	21	21.4	21.4	66.3
6.00	25	25.5	25.5	91.8
7.00	8	8.2	8.2	100.0
Total	98	100.0	100.0	

On a scale of one to seven, how useful was creating a team name and logo?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid .00	1	1.0	1.0	1.0
1.00	4	4.1	4.1	5.1
2.00	6	6.1	6.1	11.2
3.00	4	4.1	4.1	15.3
4.00	23	23.5	23.5	38.8
5.00	21	21.4	21.4	60.2
6.00	21	21.4	21.4	81.6

7.00	18	18.4	18.4	100.0
Total	98	100.0	100.0	

Statements about various aspects of the team charter.

Statement	Somewhat to Strongly agree	Undecided/ No opinion	Somewhat to Strongly disagree
The team charter helped to increase attendance at group meetings.	51.0%	18.4%	30.5%
The team charter helped to decrease lateness at group meetings.	43.9%	18.4%	37.7%
The team charter helped to increase participation at group meetings.	43.9%	21.4%	34.7%
The team charter helped to decrease social loafing.	42.0%	23.5%	34.7%
The team charter helped to clarify group goals and objectives.	75.5%	8.2%	16.3%
The team charter helped the group manage conflict effectively.	48.0%	20.4%	31.6%
The charter helped the group to identify team member strengths and weaknesses.	48.0%	26.5%	25.5%
The team charter increased the quality of group assignments.	42.8%	29.6%	27.6%

On a scale of one to seven, how useful was keeping a team journal with team minutes and agendas?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1.00	7	7.1	12.7	12.7
2.00	7	7.1	12.7	25.5
3.00	4	4.1	7.3	32.7
4.00	12	12.2	21.8	54.5
5.00	10	10.2	18.2	72.7
6.00	8	8.2	14.5	87.3
7.00	7	7.1	12.7	100.0
Total	55	56.1	100.0	
Missing System	43	43.9		
Total	98	100.0		

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