

Reading: Chartering the Design Team

Purpose and Assignment

The charter should specify the Design Team's role in making the vision a reality. The Design Team must be clear on its basic assignment and tasks—what it must do to complete its work, the blueprint of the future state.

Another important aspect of the Design Team's assignment is the scope of the design effort. The charter needs to specify what should be included within the boundaries of the design.

For example, the Design Team may be expected to:

- Assure that the changes are made using existing staff resources.
- Exclude key elements of the organization from consideration, such as technology or personnel systems.

Communicating about the vision for change and building commitment to the design is a responsibility carried out first by the Steering Committee. This responsibility should also be assigned to the Design Team because they will be interacting with those affected by the change.

“Givens” and Expectations

Another important consideration for the charter is the existence of any up-front design criteria, or “givens.”

Some examples of givens are:

- “No additional staff can be added.”
- “A no-RIF policy.”
- “System must be budget neutral.”

Expectations are leaders' requirements for the design process. The charter may state, for example, that:

- The design process must meet a specific schedule, or
- The Design Team will use a particular design method.

It might also state that the final design proposal must meet certain critical success factors, such as to:

- Supporting the goals of a diverse work force,
- Satisfying the stated goals and outcomes, or
- Justifying changes in staffing levels.

Some of the givens and expectations will be welcomed by the Design Team and others seen as constraints. Some may be negotiable and others may not.

To address this, the charter may specify areas in which issues should be discussed with the Steering Committee. All parties to the design process will need to understand the conditions and work to resolve any differences.

Deliverables

In order for the team to know its purpose, it must understand clearly what the Steering Committee expects the team to produce. These deliverables or expected outputs should be clearly described in the charter. For example:

- Will the design deliverable be several options or one recommended option?
- Will the Design Team be asked for interim products along the way?

Parameters of operation

The charter should specify the parameters or boundaries within which the Design Team will operate. A key parameter would be the timeframe requirements for accomplishing the purpose.

Other important elements to consider may include:

- Budgetary constraints
- Decision-making purview
- Timeframe requirements
- Approvals needed
- Reporting relationships

Supporting Resources

The charter should also specify resources that will be provided to the Design Team to help accomplish their purpose.

In addition to the standard resources such as meeting space, word processing help, and budget, the team may also require special design help in the form of data, facilitators, external experts, or training in the use of various design tools.

If the charter does not specify resources, it is the Steering Committee's responsibility to ensure that the Design Team's resource needs are identified and met.

Integration Requirements

When a number of Design Teams are involved due to the complexity of a design, it may be necessary to specify integration requirements among the various team design components.

Procedures set up to accomplish this might require representatives from the various teams to meet regularly or the Steering Committee to regularly review design decisions or resolve integration issues.

Overall Steering Committee Support

The Steering Committee needs to support the Design Team throughout the design process. It needs to ensure that the Design Team is properly oriented to and trained for its tasks.

In addition, the Steering Committee needs to think through how it will monitor the design process and review Design Team outputs, as well as how decisions will be made about the final design.

Team Operating Procedures

Once the Design Team has been chartered, members must spend time setting up their own operating procedures. Decisions need to be made concerning:

- How the team will operate from day to day.
- How the team will tackle its assignment.