



Team Charter

TEMPLATE

Introduction

A team charter serves as a foundational document that defines a team's purpose, goals, responsibilities, and ways of working together. It acts as a guiding agreement that aligns team members on expectations and accountability.

An HR team charter is particularly important due to the cross-functional nature of HR. HR teams interact with multiple stakeholders, including employees, business leaders, and external partners. A well-defined charter helps establish clarity, alignment, and accountability—ensuring that HR delivers maximum business value.

By following this structured approach, HR professionals can create a high-performing team with clear roles, decision-making processes, and shared goals.

Best practices

Creating a team charter is a collaborative effort that sets the foundation for success. Use these practical tips to ensure your charter is not just a document, but a tool that drives alignment, accountability, and performance.



Gather input before the meeting.

Send team members context-setting questions ahead of time (e.g., “What do you bring to the team?”, “What are your expectations?”, “What challenges does the team face?”). Also, ask leadership and other stakeholders what they expect from the team.



Set aside dedicated time for the exercise.

Schedule a structured workshop or meeting to complete the charter and ensure all key team members participate.



Facilitate an open discussion.

Make sure everyone's voice is heard by using brainstorming techniques or anonymous input tools (if needed).



Be specific about roles and responsibilities.

Clarify each person's exact role, accountability, and deliverables.



Keep the mission statement clear and actionable.

Make the mission statement short, specific, and aligned with business goals.

Team Charter // How to use each section

PURPOSE AND CONTEXT

Clarify why the team exists, its key responsibilities, and how it fits into the broader organization. Every HR team should understand:

- What kind of team this is (e.g., HRBP team, talent acquisition, L&D, DEIB, people analytics).
- What responsibilities fall within the team's scope, and what don't.
- Who the team is accountable to (HR leadership, business leaders).
- How the team connects with other HR functions and stakeholders.

PRO TIP: Hold a structured meeting to gather input from all team members. Use flip charts, an online collaboration tool, or anonymous surveys to capture responses.

MISSION AND GOALS

- Create a mission statement that defines your HR team's role in the organization.
- Set SMART (specific, measurable, achievable, relevant, time-bound) goals related to key HR deliverables.
- Determine what success looks like and how progress will be measured.

TEAM VALUES

- Use simple, direct language that is easy to understand and remember.
- Values should guide behavior, not just abstract ideals. Define how they show up in daily work.
- Ensure values reflect both the HR team's mission and the company's broader culture.
- Frame values in an encouraging way that fosters collaboration and accountability.

DECISION-MAKING

- Use a structured framework like RACI to clarify roles.
- Define which decisions can be made independently and which require team or leadership input.
- Establish an escalation process for urgent matters.
- Keep transparency by documenting key discussions and outcomes in a shared space.
- Regularly review and refine decision-making processes to improve efficiency.

COMMUNICATION

- Set clear expectations for response times and message clarity.
- Keep meetings structured with agendas and action items.
- Maintain transparency by documenting key updates in a shared space.
- Foster an open, respectful environment where everyone feels heard.
- Regularly assess and adjust communication methods to improve efficiency and collaboration.

HOW WE WORK

- Involve all team members in defining shared expectations and ways of working. This builds alignment and commitment.
- Outline clear behaviors and collaboration norms rather than vague statements.
- Ensure the section reflects your core values to reinforce team culture.

ROLES AND RESPONSIBILITIES

- Define individual roles and what each person contributes.
- Clarify team structures and subgroups (if applicable).
- Identify work processes: How does the team collaborate? How are tasks assigned? Ask each team member to document their role and how their responsibilities contribute to team goals.

Team Charter // Template example

PURPOSE AND CONTEXT

Our team exists **to align HR strategies with business goals, support leaders in workforce planning, and enhance the employee experience. As the HR business partner (HRBP) team**, we act as strategic advisors to business leaders, ensuring that HR initiatives drive organizational success.

Key responsibilities:

- Provide expert HR guidance on talent management, workforce planning, and organizational development.
- Act as a bridge between HR functions and business units, ensuring alignment with company objectives.
- Support managers in employee engagement, performance management, and leadership development.
- Collaborate with talent acquisition, L&D, and DEIB teams to ensure a seamless employee lifecycle experience.
- Proactively address workplace challenges and drive data-informed HR decisions.

We are accountable to:

- The HR leadership team
- The business unit leaders
- Employees

ROLES AND RESPONSIBILITIES

- **HRBP lead** oversees strategy, escalates issues, and ensures team alignment.
- **HRBP** partners with assigned business, unites, and provides HR guidance.
- **HR analyst** provides data insights for decision-making.
- **Talent partner** supports hiring and workforce planning.
- **Employee experience specialist** designs and implements initiatives to improve employee engagement, retention, and workplace culture.
- **Learning and development partner** supports talent growth by identifying training needs, developing learning programs, and aligning L&D strategies with business goals.

MISSION AND GOALS

We partner with business leaders to develop and execute people strategies that drive engagement, retention, and business success.

Team goals (SMART objectives)

- Improve employee engagement scores by 10% within the next 12 months.
- Reduce voluntary turnover from 15% to 12% in the next six months.
- Increase HRBP involvement in leadership meetings to 100% participation each quarter.

TEAM VALUES

Our team is guided by a shared set of values that shape how we collaborate, make decisions, and support our stakeholders. These values define our culture and commitment to excellence in HR. These values are:

- Collaboration
- Empathy
- Integrity
- Ownership

DECISION-MAKING

- We use the RACI model, which clearly defines who is responsible, accountable, consulted, and informed for each major decision.
- We have weekly team syncs, monthly check-ins with business leaders, and quarterly strategy sessions.

COMMUNICATION

- **Slack** for quick updates, daily check-ins, and team collaboration
- **Email** for formal communications, escalations, and key HR updates
- **HRIS (e.g., Workday, SAP)** for data sharing, reports, and employee case management
- **Shared Drive (Google Drive, SharePoint)** to store team resources, documents, and meeting notes

HOW WE WORK

- We commit to open, respectful communication—seeking solutions, not blame.
- We document key discussions and decisions in a shared HRBP workspace.
- We escalate issues quickly and transparently.

Team Charter // Template

PURPOSE AND CONTEXT

ROLES AND RESPONSIBILITIES

MISSION AND GOALS

TEAM VALUES

DECISION-MAKING

COMMUNICATION

HOW WE WORK