THINGS TO INCLUDE IN A CHANGE CHARTER

evolve.

Creating a change charter is a great way to make sure everyone is on the same page before the change gets started. This should not be something that takes forever to write or get approved, it should just be an internal document that makes roles, responsibilities, change goals, and a few other things clear.

I have always found that by getting a change charter approved up front, a lot of the smaller decisions that might need approval later and slow down any momentum the change team built are eliminated. Below are a few change charter recommended sections and what you might want to include in each section.

Change Details

The purpose of this section is to provide an overview of the change. It should include:

- **Background** – What led up to the need for this change. This is useful especially for large transformations that may span several leaders and for posterity.
- **The Main Why** – What was the main impetus for the change? What is the compelling reason? This will be a great start for managing and aligning the messaging.
- **The Desired Outcome(s)** – Stating this upfront will serve as the guiding principles for the change – everything should be in service to moving the organization towards these outcomes, directly or indirectly.
- **Change Continuum/ Framework** – Getting approval for the framework up front in the charter alleviates some of the need for interim approvals once you get started. It also expands on the desired outcomes so leadership can visualize what this change will look like, giving them the opportunity to ask questions or adjust as needed up front, instead of once you get started on the change.

Change Team

The purpose of this section is to introduce the change team and the team structure to leadership as well as to be clear with the change team as to their roles and responsibilities. It should include:

- **Change Team Members** – The names and contact information for every change team member (and distinct roles, if assigned)

- **Change Team Structure** – Is the change team a new formal organization structure where the team formally reports to the change team lead? Is this a full-time gig for change team members? Is this an "other duties as assigned" part-time gig while still sitting in their original position?
- **Change Team Roles and Responsibilities** – Sometimes the change team is responsible for things like internal communications for the change. Other times, there is a group who manages all internal and external communications and the change team is responsible for coordinating with that team for communication needs. This section needs to clear up any ambiguity with roles and list any other groups who are responsible for some of the change functions. (I highly recommend that any groups who have an external function the change team will be dependent on be invited to have a representative on the change team itself.)
- **Executive Sponsor** – Here is where you can list the person who has been identified as the executive sponsor (or request one, if you don't have one). Refer to the executive sponsor worksheet for details on potential roles and responsibilities this person should be responsible for.
- **Change Network** – If you are going to implement a change network as part of the change effort, here you can discuss who will be invited to participate in the change network, how members will be selected, the time commitment per week or month throughout the change, their roles and responsibilities, and any other pertinent information. You do not have to have the change network members identified here. In fact, you may want to create a separate change network charter for public consumption as you go out looking for change network volunteers.

Key Stakeholders

- **Key Stakeholders List** – In this section, you want to list all of the key stakeholders that will need to stay informed throughout the change. This could include different subsections of the workforce as well as external stakeholders like regulatory bodies, customers, or others, depending on the change.
- **RACI chart** – For those who aren't familiar with RACI charts, it is a matrix that shows all of the stakeholders along one axis (typically the top) and high-level change project milestones on the other axis (typically the left). Within the matrix, each stakeholder is assigned a role: Responsible, Accountable, Consulted, Informed.
    - **Responsible** – Those stakeholders with this designation will be doing the actual work to accomplish the milestone
    - **Accountable** – There should only be one person accountable for each milestone. This will most likely be the change leader or the executive sponsor
    - **Consulted** – These stakeholders will have expertise or opinions that will be consulted in the process of completing the milestone
    - **Informed** – These stakeholders will be informed after the milestone is completed