**INTERDISIPLINARY RESEARCH TEAM CHARTER**

**The University of Georgia, Spring 2020**

**BACKGROUND:** Interdisciplinary research teams (i.e., teams composed of researchers from diverse disciplinary areas of expertise) offer the promise of bridging gaps between disciplines and allowing for the combination of previously disconnected ideas, methodological approaches, and theoretical frameworks[[1]](#footnote-1). Indeed, interdisciplinary research teams have the potential to produce novel and high-impact research for the great benefit of society[[2]](#footnote-2). However, interdisciplinary research teams often encounter barriers to success such as misaligned goals and expectations, ineffective communication processes, and interpersonal conflict[[3]](#footnote-3). Breakdowns in collaboration can occur as teams attempt to navigate differences among members with regard to their experiences, tenure and promotion requirements, methodological approaches, theoretical foundations, work processes, goals, and social identities.

**Team leaders** can play a key role in helping interdisciplinary research teams prevent and overcome collaboration challenges[[4]](#footnote-4),[[5]](#footnote-5). Hackman[[6]](#footnote-6) identified six “**enabling conditions**” that teams need in order to succeed (summarized in Table 1 on the next page). By establishing and maintaining these enabling conditions, team leaders can help remove obstacles to team goal achievement and increase the likelihood of success. One exercise that has been shown to substantially improve team effectiveness is the development of a **team charter**[[7]](#footnote-7). Team charters help leaders and team members collectively establish and understand the enabling conditions. Team charters have been shown to help teams focus on achieving collective goals[[8]](#footnote-8); engage in more effective communication across scientific disciplines[[9]](#footnote-9); and be more resilient to unexpected disruptions[[10]](#footnote-10).

**TEAM CHARTER INSTRUCTIONS:** In this activity, we encourage team leaders to go through **Section 1** independently and brainstorm about their vision for the team. Specifically, leaders should begin to clarify their team’s purpose or mission; one or more initial goals that the team can focus on accomplishing in the near future; necessary subtasks and a timeline for accomplishing these tasks; any resources available to the team to aid in goal accomplishment; the expected contributions for each individual team member; and norms for communication (e.g., when, how often, through what communication medium(s), etc.).

After completing Section 1, we suggest that team leaders dedicate time during an initial team meeting to complete the next two sections of the charter. **Section 2** should be completed individually by each team member. This section asks each individual to share basic information about their area(s) of expertise, motivations for joining the team, individual goals, and preferred communication norms. **Section 3** should be completed collectively by all team members (including the team leader). The goal of Section 3 is to incorporate individual responses in Section 2 in order to revise the leader’s initial vision in Section 1. While completing this section, team leaders should ensure that the information provided by each team member in Section 2 is incorporated and that all team members agree on the final version of Section 3. Your team may go through several iterations of Section 3, and we encourage you do to so as your team develops and changes over time.

**Table 1. Six “enabling conditions” to support team performance.**

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| **Real team.** Real work teams are intact social systems whose members work together to achieve a common purpose. They have clear boundaries that distinguish members from nonmembers. They work interdependently to generate a product for which members have collective, rather than individual, accountability. And they have at least moderate stability, which gives members time to learn how to work well together. |
| **Compelling purpose.** A compelling purpose energizes team members, orients them toward their collective objective, and fully engages their talents. Purpose has high priority when establishing a team because so many other design decisions depend on it—how the team is structured, the kinds of organizational supports that are needed, and the type of coaching by team leaders that will be most helpful. |
| **Right people**. Well-composed teams have the right number and mix of members, each of whom has both task expertise and skill in working collaboratively with others. And they are as small and diverse as possible—large size and excessive homogeneity of membership can cripple even teams that otherwise are quite well designed. |
| **Clear norms of conduct.** Norms of conduct specify what behaviors are, and are not, acceptable in a team. Having clear, well-enforced norms greatly reduces the amount of time a team must spend actively managing member behavior. The best norms promote continuous scanning of the performance situation and the deployment of work strategies that are well tuned to the special features of the team’s task and situation. |
| **Supportive organizational context.** Even teams that are properly structured and supported sometimes founder because they cannot obtain the organizational supports they need to perform well. Having the material resources needed to carry out the work is of course essential. But beyond that, team performance is facilitated when (i) the reward system provides recognition and positive consequences for excellent team performance, (ii) the information system provides the team with the data and the information-processing tools members need to plan and execute their work, and (iii) the organization’s educational system makes available to the team any technical or educational assistance members may require. |
| **Team-focused coaching.** Competent and well-timed team coaching (by the team leader and/or an outside coach) can help a team minimize its exposure to process losses and increase the chances that it will operate in ways that generate synergistic process gains. But even highly competent coaching is likely to be futile when the other enabling conditions are not in place, or when the team is not at a stage of its life cycle when members are ready to receive it. That is why coaching, as important as it can be in fostering competent teamwork, comes last in the list of enabling conditions |

**Additional Recommended Readings as you Build Your Team:**

[A Short Guide to Building and Managing Interdisciplinary Research Teams](https://jlesc.github.io/downloads/docs/ISSTI_Briefing_Note_3-Building_Interdisicplinary_Research_Teams.pdf)

[Interdisciplinary Research Collaborations: A Guide to Creating New Research Teams](https://www.apa.org/science/about/psa/2017/11/tell-friends)

[The New Science of Building Great Teams](https://hbr.org/2012/04/the-new-science-of-building-great-teams)

[Why Diverse Teams are Smarter](https://hbr.org/2016/11/why-diverse-teams-are-smarter)

[What makes interdisciplinarity difficult? Some consequences of domain specificity in interdisciplinary practice](https://link.springer.com/article/10.1007/s11229-016-1236-4)

**SECTION 1: LEADER BRAINSTORMING**

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| **Statement of Team Purpose** |  |
| **Initial Team Goal** |  |
| **Subtasks/Timeline for Goal Accomplishment** |  |
| **Internal Resources** (e.g., team members’ expertise, resources, etc.) |  |
| **Individual Contributions** |  |
| **Communication Norms** |  |

**SECTION 2: ALL TEAM MEMBERS COMPLETE INDIVIDUALLY**

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| --- | --- | --- | --- |
| **Team Member Information** | **Team Member 1** | **Team Member 2** | **Team Member 3** |
| **Name** |  |  |  |
| **Email address** |  |  |  |
| **Phone number** |  |  |  |
| **Preferred communication method(s)** |  |  |  |
| **Why did you decide to join this team?** |  |  |  |
| **What do you hope to accomplish as a member of this team?** |  |  |  |
| **Area(s) of expertise/ research interests** |  |  |  |
| **Valued outcomes in your discipline/ department**  **(e.g., preferred publication outlets, funding agencies, patents, performance, etc.)** |  |  |  |

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| --- | --- | --- | --- |
| **Team Member Information** | **Team Member 4** | **Team Member 5** | **Team Member 6** |
| **Name** |  |  |  |
| **Email address** |  |  |  |
| **Phone number** |  |  |  |
| **Preferred communication method(s)** |  |  |  |
| **Why did you decide to join this team?** |  |  |  |
| **What do you hope to accomplish as a member of this team?** |  |  |  |
| **Area(s) of expertise/ research interests** |  |  |  |
| **Valued outcomes in your discipline/ department**  **(e.g., preferred publication outlets, funding agencies, patents, performance, etc.)** |  |  |  |

**SECTION 3: TEAM MEMBERS COMPLETE TOGETHER DURING FIRST MEETING**

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| **Statement of Team Purpose** |  |
| **Initial Team Goal** |  |
| **Subtasks/Timeline for Goal Accomplishment** |  |
| **Internal Resources** (e.g., team members’ expertise, resources, etc.) |  |
| **Individual Contributions** |  |
| **Communication Norms** |  |

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