

# Template: Role Charter

## What's a Role Charter?

A role charter clarifies who's accountable for what work and who has the authority to decide it. It also draws the line between your role and the next one over.

## Role Charters vs. Job Descriptions

Role charters differ from traditional job descriptions in a few important ways:

1. Job descriptions are written to advertise job openings. **Role charters are written by people closest to the work** to clarify tactical questions around who should be doing what, who can make what choices, and for what purpose.
2. Job descriptions conflate categories of responsibility, competencies, and required experience. **They don't clarify how work actually gets done.** For example, your job description might say you're responsible for "Managing budget." That doesn't address a question like, "If we disagree on budget, am I the final shot-caller?" A role charter does.
3. Job descriptions assume one person = one job. **But roles can be more focused and dynamic.** Also, team members may play more specific roles on temporary projects. You might be a senior manager holding both a leadership team role and a time-bound role on a project with colleagues from other departments. In this context, "Senior Manager" doesn't clarify how you work with cross-functional colleagues. A role charter helps you and your teammates understand who's playing what role and with what authority.

## Before You Start

New to role charters? These four tips will help you get moving before you fill in a single box.

1. **Start with purpose.** It's the one thing worth getting right first.
2. **Keep accountabilities to 3-5 broad buckets.** Skip the task list.
3. **Create one charter per role.** Playing more than one? Fill out a charter for each.
4. **Write decision rights for the role, not this week's project.** They should outlast whatever you're working on right now.

| CATEGORY         | DESCRIPTION                                                                                                                                                                    |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PURPOSE          | <p>Why does this role exist? If successful, what’s different about the organization?</p> <p>-----</p> <p>-----</p> <p>-----</p>                                                |
| ACCOUNTABILITIES | <p>What ongoing activities does this role deliver?</p> <p>-----</p> <p>-----</p> <p>-----</p>                                                                                  |
| DECISION RIGHTS  | <p>What can this role decide on its own? Within what guardrails is it autonomous?</p> <p>-----</p> <p>-----</p> <p>-----</p>                                                   |
| METRICS          | <p>What metrics does this role look at to steer its work and understand progress?</p> <p>-----</p> <p>-----</p> <p>-----</p>                                                   |
| ADVICE           | <p>Where and when should this role be pulled in to give advice before a final decision is made?</p> <p>-----</p> <p>-----</p> <p>-----</p>                                     |
| DEPENDENCIES     | <p>What other roles should this role coordinate with and when? What guardrails trigger seeking outside advice, guidance, or action?</p> <p>-----</p> <p>-----</p> <p>-----</p> |