

CHARTER TEMPLATE & GUIDANCE

SDG collaborations will develop a charter that identifies important group norms through a facilitated group process that involves all available members of the group. The charter is reviewed annually. Specific work plan information (e.g., timelines, budgets) should appear in a separate document.

Elements of a Collaboration Charter

Purpose/Goal

This should be a high-level assessment – does not include the "how" details like objectives, tactics, and metrics.

Operations

Governance

- State that there will be a chair or co-chairs, their term of office, and how they are selected
- State that the collaboration will adhere to the SDG public policy guidelines regarding advocacy
- Consider noting:
 - How the group ensures ongoing leadership (a pipeline of chairs and champions)
 - How decisions will be made (e.g., consensus, majority, or gradation of agreement)
 - If, when and how the group will evaluate funding and advocacy opportunities

Membership

- State that participation is open to all SDG members who meet participation criteria
- State participation criteria and consequences of missing meetings, deadlines, etc.; consider
 - Time commitment (attendance)
 - Financial commitment

Meetings & Committees

- State that meetings are documented using the SDG collaboration notes template, which are archived and available from SDG (and online, starting late 2016)
- Consider
 - Minimum meeting frequency
 - What interaction agreements ensure inclusive and democratic discussion
 - If there will be standing and/or ad hoc sub-committees

Grants, Resources, and Funding

- State known resource needs (i.e., beyond standard SDG help) and related funding needs

Evaluation

- Identify metrics for group effectiveness (e.g., number of members, participation)
- Identify process to evaluate community impact (if applicable), including funded projects
- This section may refer to other processes, e.g., using SDG annual survey results or grant reports

Termination

- Identify what “success” looks like if the group has terminal goals
- Identify what would trigger a group to spin out from SDG, if that is a possibility
- Identify an exit strategy, if applicable