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## The Perceived Value of Using a Team Charter in Business Education

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### ABSTRACT

Business schools seek to prepare students for the workplace with employer-valued skills such as communication, teamwork, and application of knowledge. As such, a common practice for business and management educators is to involve students in collaborative team-based assignments and community projects. For example, to facilitate the development of teamwork skills, faculty members may have students create a team charter, which involves student teams identifying goals, roles, and norms. However, empirical evidence of the value of team charters is limited. This study examined student perceptions of team charters to determine if they played a role in effective teamwork or if other variables accounted for team success. The study entailed an analysis of a mid-semester team evaluation survey and an end-of-semester team charter survey. Findings indicated that overall, including the development and application of student charters in student group projects leads to several significant benefits and learning outcomes. However, the perceived usefulness of charters varies among students by level of experience and year in school.

**Keywords:** team charters, employer-valued skills, teamwork, learning outcomes, management education

A shared goal for business educators in higher education is to prepare students for the workplace. Therefore, schools of business with professional accreditation must provide evidence that their educational endeavors foster lifelong learning and have a societal impact (e.g., see Association to Advance Collegiate Schools of Business, 2020), ensuring students develop cross-cutting 21<sup>st</sup>-century skills relevant to all disciplines and work sectors. Business executives and hiring managers have identified the most important of these skills as communication, ethical judgment, effective teamwork, and the application of knowledge and skills to real-life (Hart Research Associates, 2018). As such, a common practice for business and management faculty is to involve students in collaborative team-based assignments and community projects.

To facilitate the development of teamwork skills, faculty members may have students create a team charter. A few studies have identified positive outcomes of this practice such as improved communication, effort, mutual support, cohesion, and satisfaction (McDowell et al., 2011, 2014); better relationships and task commitment (Pak & Kim, 2018); and increased motivation and responsibility (Pertegal-Felices et al., 2019). Research has not examined to any extent how student teams use their charters. One study suggests that students may not refer to their charters to address conflict or clarify responsibilities (Hunsaker & Hunsaker, 2010). Similarly, research has not determined if charter quality plays a role. Charters may be inadequately developed or conceptualized. It is also unknown if students actively revise their charters to reflect evolving team processes.

The preponderance of research has focused on recommendations for charter content (Aaron et al., 2014; Bird & Luthy, 2010; Cupello, 1995; Hunsaker et al., 2011; Mathieu & Rapp, 2009; Norton & Sussman, 2009; Pilette, 2017). Additionally, other factors may be more salient in developing team cohesion such as shared but unwritten expectations, referred to as psychological contracts, that evolve as teams work together (Holtham et al., 2006; Hunsaker & Hunsaker, 2010; Hunsaker et al., 2011; Robinson, 1996; Rousseau, 1989; Sverdrup & Scheil, 2015; Norton & Sussman, 2016). Although the use of team charters in higher education appears to be a promising practice for developing students' teamwork skills, this has not been well-established empirically.

The goal of this study is to gain insights into students' perceptions of the value of using team charters. It seeks to determine if charters play a role in effective teamwork or if other variables are more salient. The study entails a midterm team evaluation survey and an end-of-semester team charter survey. Findings will inform teaching practice, especially strategies for helping students develop teamwork skills in management education and in higher education generally. The study fills a gap in team charter research in management education.

## Literature Review

Effective teamwork in business and management courses goes beyond just creating teams and giving students assignments to work on together. "Good practices in teamwork are not simply learned by being part of a team" (Zarraga-Rodriguez et al., 2015, p. 275). Students have likely experienced working in groups, defined as a "collection of individuals with a task to be concluded without much defined structure," but not teamwork (Scott et al., 2012, p. 190). Teams consist of "a small number of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable" (Katzenbach & Smith, 1993, p. 2). Students not only need opportunities to develop teamwork skills, but also structured guidance and coaching (Andrade & Ziegner, 2021). Such guidance involves understanding the importance of collective performance, common goals, agreed-upon working approaches, individual and mutual accountability, and shared skills (Katzenbach & Smith, 1993, 2015; Robbins & Judge, 2017) as well as team coaching (Scott et al., 2012).

Teamwork is viewed as critically important for recent higher education graduates, specifically the ability to collaborate, lead, and work with others (Riebe et al., 2016) in virtual and global contexts (Johnson et al., 2022; Kotey, 2007). As students work in teams, they plan, organize, lead, and control, thus

developing key managerial skills (Andrade, 2019; Andrade, Miller, & Ogden, 2020; Andrade & Ziegner, 2021; Fayol, 1916). Teamwork helps students develop skills related to UNESCO's pillars of learning: learning to know (acquiring knowledge, deepening understanding), learning to do (developing skills and methods), learning to live together (showing tolerance and understanding), and learning to be (increasing self-awareness, taking ownership, setting goals, and being self-directed) (Andrade, 2019; Delors, 2013). It supports motivation, professional skill development (Rhee et al., 2013; Volkov & Volkov, 2015), deep learning (Ohl & Cates, 2006; Scott-Ladd & Chan, 2008; Volkov & Volkov, 2015; Wageman & Gordon, 2005), critical thinking, content mastery, and knowledge retention (Biggs & Tang, 2011; Hall et al., 2004). Teamwork is also associated with entrepreneurial skill, specifically, the ability to work collaboratively and mobilize supporters to embrace ideas (Peschl et al., 2021). Teamwork characterized by shared goals, interdependent tasks, combined skill sets, and the absence of relationship conflict needs to be explicitly taught in entrepreneurship education.

Barriers to effective teamwork in business education have been identified as poor preparation, lack of scaffolding, and absence of structure (Andrade & Ziegner, 2021). Although research-based methods for effective teamwork are readily available, faculty members may fail to apply these (Barber & Ferguson, 2015) from lack of knowledge (Murray & Lonne, 2006), or due to lack of time or resources (Burbach et al., 2010; Scott-Ladd & Chan, 2008). Consequently, students may associate teamwork with frustration, work overload, and low grades; they may use strategies such as groupthink to avoid conflict or allow interpersonal dynamics to cause dysfunction (Galbraith & Webb, 2013). Negative experiences with teamwork can result in weakened confidence, concerns over equal distribution of work, and apprehensions about logistical arrangements such as scheduling team meetings (Cheruvilil et al., 2020; Pfaff & Huddleson, 2003; Schultz et al., 2010).

### **Team Charters**

Team charters can encourage effective teamwork by setting "mutual expectations regarding behaviors of the group, meeting management and allocation of work" (McDowell et al., 2011, p. 80). Charters help team members identify goals, determine communication methods, assign tasks and roles, and establish norms (Goodbody, 2005; Mathieu & Rapp, 2009; Moussa et al., 2017; Norton & Sussman, 2009, 2016). The process of creating a charter can clarify expectations and create a psychological contract that helps teams overcome problems that may occur (Holtham et al., 2006). Although teams may be successful simply by being assigned to teams with compatible members or having a skilled or experienced leader, charters provide guidelines, particularly for those inexperienced with teamwork, and establish common expectations and processes (Hunsaker et al., 2011; Norton & Sussman, 2016). Heterogeneous teams have less for need a charter but will also not benefit from diverse perspectives (Norton & Sussman, 2016).

### **Benefits**

A number of benefits of team charters have been identified. Common goals, expectations, and standards increase accountability and help teams avoid unproductive conflict (Norton & Sussman, 2009). Team vision, roles, and norms encourage students to see the advantages of shared purpose; diversity of ideas, skills, and personalities; and the importance of giving and receiving feedback

(Andrade, Miller, & Ogden, 2020). Charters can circumvent common issues in student teams such as engaging in tasks without considering team members' skill sets, understanding expectations, agreeing on common goals, determining commitment, deciding how to communicate and make decisions, and how to ensure equal contributions (Hunsaker et al., 2011). They can also increase satisfaction and work quality (Fittipaldi, 2020; Hunsaker et al., 2011; Kapp, 2009; McKendall, 2000). Although team members may share general performance goals, they may also have personal goals that may conflict with those of the team (Hunsaker et al., 2011). Potentially, charters can guide teams through the stages of forming and storming, enabling them to reach the norming and performing stages more quickly (Riebe et al., 2010; Tuckman, 1965; Tuckman & Jensen, 1977).

The outcomes of team charter use include improved communication, effort, mutual support, cohesion, and satisfaction (McDowell et al., 2011). These aspects increase when teams receive instruction on how to develop a charter (Feuer & Wolfe, 2023; McDowell et al., 2014). Student teams with charters report greater motivation and responsibility (Pertegal-Felices et al., 2019). Global student teams with charters experienced better processes only in the forming stage of team development and more conflict than teams without charters; this did not impact peer evaluations or the teams' perceptions of work quality (Johnson et al., 2022). However, no project grade differences were found between teams with charters and those without (Johnson et al., 2022). In the workplace, charters increase positive attitudes toward coworkers and task commitment (Pak & Kim, 2018). Charters create a mental model to help team members be like-minded and act in harmony; as such, they can predict each other's behaviors and make decisions quickly (Kirkman et al., 2019). Other outcomes include decreased intragroup conflict, increased process speed, better decision quality, shared values, greater team member satisfaction, and reduced exposure to litigation (Norton & Sussman, 2016).

### **Content and Quality**

Team charters vary in content but typically focus on some combination of the following: vision, goals, values, roles, commitment, decision-making, meetings, norms, communication, conflict resolution, and accountability (Aaron et al., 2014; Bird & Luthy, 2010; Cheruvilil et al., 2020; Cupello, 1995; Norton & Sussman, 2009; Pilette, 2017). Agreed-upon values help shape member behaviors while norms govern how team members treat each other. Mathieu and Rapp (2009) organize charter content into three sections: 1) preferred working styles, availability of team members, contact information; 2) feedback mechanisms, meeting plans, general working styles; and 3) plans for performance problems and ways to provide feedback and rewards. Less commonly noted components are outside intervention, ways to identify new team members, and rewards (Norton & Sussman, 2009). Yet another recommendation for organizing charter content, based on best practices in the literature, is mission, vision, team identity (e.g., team name; member's names, contact information, skills), boundaries (policies, procedures, values), operating guidelines, and performance norms and consequences, and endorsement (signatures of all team members) (Hunsaker et al., 2011).

Quality is also a variable that must be considered. Certainly, when guidelines and content requirements are provided, this provides some assurance that teams will discuss and identify appropriate processes. However, some team charters may be more effective than others, have more specific content to guide behaviors and practices, or have better buy-in from team members upfront (Courtright, 2017; Kirkman

et al., 2019). Instructors may need to oversee the charter development process and provide feedback on student team charters. Creating a team charter is likely something new for students and they do not always understand instructions or anticipate at the beginning of a course why a charter is needed or how it will be used. Building in individual and team reflection and performance review processes at various points in the semester can address this (Andrade, 2019; Andrade, Miller, & Ogden, 2020; Andrade, Kakegawa & Johnson, 2021). This approach facilitates ownership and responsibility for teamwork rather than it being instructor directed. Students can also review each other's charters to get ideas. As students gain experience working in teams, they recognize that changes are needed; however, the opportunity to formally evaluate their practices requires structure from the faculty member in the form of a review assignment.

### **Development**

Creating a team charter should be a collaborative process that involves identifying common values and defining what success looks like and how it will be measured. For charters to be successful, teams need to agree on their roles and processes as represented in the charter. Some suggest doing this with signatures to give each member the opportunity to provide a formal endorsement (Hunsaker et al., 2011; Harris & Bristow, 2016). Team member participation in charter creation ideally leads to the outcomes noted earlier such as improved productivity, equal participation and workload distribution, positive relationships, reduced interpersonal conflict, agreement on tasks and responsibilities, and effective communication (McDowell et al., 2011, 2014; Norton & Sussman, 2011, 2016; Pertegal-Felices et al., 2019).

Instruction on how to create team charters improves team functioning (Aaron et al., 2014; Fittipaldi, 2020; Feuer & Wolfe, 2023; Pak & Kim, 2018; Norton & Sussman, 2009; Pertegal-Felices et al., 2019). Instructors should provide guidelines to help students identify principles of effective teamwork. Training might include communication, goal setting, consensus, roles, responsibilities, and expectations, and be reiterated at various times in the semester (Fittipaldi et al., 2018). Examples of charter content were shared earlier and can be adapted as needed. Learning management systems and other tools can support team processes such as team formation, communication, peer reviews, and document collaboration (Loughry et al., 2014). Instructors have addressed the problem of students viewing team charters as busy work by implementing online training modules resulting in greater accommodation of differences across teams, better planning, and improved establishment of norms (Feuer & Wolfe, 2023). Some instructor oversight is needed to ensure that students' charters are well-developed and comprehensive, and particularly, that they are specific enough to guide each team and clarify responsibilities and expectations when issues arise. Considering team charters as a living document that can be adapted as teams progress and new needs or conditions are identified addresses this need (Andrade & Ziegner, 2021; Knapp et al., 2020). This entails a regular review of charter content to reinforce goals, roles, and norms, to determine if changes are needed, and to make plans for implementing the changes (Andrade & Ziegner, 2021).

### **A Theoretical Gap**

Although a number of ideas have been suggested for team charter content and development, little empirical evidence or theory supports these recommendations. “Despite the increasing interest in the initial phase of teamwork, the literature on team charters is surprisingly atheoretical” (Sverdrup & Schei, 2015, p. 452), but is primarily based on best practices. Recent research finds limited benefits to a team’s internal processes and no impact on outcomes (Johnson et al., 2022). Social exchange theory has been suggested as relevant to team charters in that it describes how people measure the costs and benefits of their decisions to balance their obligations and maximize their rewards (Hunsaker et al., 2011; Wayne et al., 1997). Realistic job preview has also been suggested as a concept providing insight into the benefits of charters as charters describe expectations in the same way that job previews help applicants realistically anticipate job tasks and new working environments; this results in greater employee satisfaction and commitment (Norton & Sussman, 2016).

Psychological contracts have also been suggested as a theoretical lens for understanding team charters (Hunsaker et al., 2011; Norton & Sussman, 2016; Sverdrup & Schei, 2015). These are implicit, unwritten agreements and expectations that govern behaviors and goals, and evolve naturally as team members work together, particularly on long-term projects (e.g., see Robinson, 1996; Rousseau, 1989). Team charters could also be considered a type of formalized, written psychological contract, or in some cases, psychological contracts may be as efficacious as formal team charters. A qualitative study of small teams of farmers in collaborative partnerships found that highly-functioning teams operated by psychological contracts characterized by explicit expectations albeit with mutual compromises (Sverdrup & Schei, 2015). Expectations and commitments focused on work effort and quality rather than processes and were most effective when characterized by tolerance when things did not go as planned.

The practice of student team charters seems promising as it provides students with the opportunity to plan and organize their work. Research on teamwork in management education has identified evidence of student engagement in the managerial functions of planning, organizing, leading, and controlling, but has not examined the role of team charters in facilitating these functions (Andrade & Ziegner, 2021). Studies on team charters tend to outline best practices for content rather than empirical evidence of their efficacy (e.g., see Aaron et al., 2014; Bird & Luthy, 2010; Cheruvelil et al., 2020; Cupello, 1995; Hunsaker et al., 2011; Kirkman et al., 2019; Norton & Sussman, 2009; Pilette, 2017; Sverdrup & Schei, 2015). Although the use of team charters is assumed to be an effective practice, research is limited, particularly in educational contexts.

### **Methods**

The participants for this study were enrolled in an introduction to organizational behavior course at a large, regional, open admission university in the U.S. The 3-credit hour course is required for all business majors seeking a 4-year undergraduate degree at this university. A full-time course load is 12 or more credits per 16-week semester. A 3-credit course entails three hours of formal class or instruction time per week with an additional 9 hours of work on reading and course assignments. Students need a minimum of 120 credits of required and elective courses to graduate. Students in the course had completed varying numbers of credits toward graduation (e.g., at least 30; see the Results section for

more details). They were in what would be considered their second year, third year, or fourth year of study, based on credit hours completed.

In the course, students work in teams to resolve management challenges and arrive at theory-based solutions, which they document in team ePortfolios. This prepares them for a consulting project with a community partner in which they collect and analyze data about a real-life management issue and make recommendations based on the theories they are studying. Study participants were enrolled in five sections of the course, all of which were delivered online, over two semesters. In total, participants included 124 students. Details regarding the number of credit hours the students completed are provided in the Results section; students were randomly assigned to teams. All sections were taught by the same instructor.

At the beginning of the semester, the instructor divided students into teams of approximately 6 students. Students were given guidance on the purpose and content of team charters after which they created their charters. The instructor gave feedback on the charters, primarily to emphasize that they should be considered a living document and modified throughout the course as needed. Students took a midterm team evaluation survey to guide a team performance review involving reflection, goal-setting, and charter review, and also evaluated the use and effectiveness of team charters at the end of the semester. The instructor gave feedback on the midterm evaluation and team goals and encouraged changes to team charters as appropriate. The course also included accountability measures in that students gave each other points amounting to about 6% of the final grade at the end of the semester. This mixed methods study involved analyzing data from the midterm team evaluation survey and the team charter survey to determine the use of team charters.

The midterm team evaluation survey consisted of nine questions on team effectiveness based on generally recognized characteristics of high-performing teams and two open-ended questions (See Appendix A). The end-of-semester team charter survey consisted of eight sections—use, quality and training, a living document, charter alternatives, efficacy and clarity, motivation and enjoyment, conflict, and outcomes—with several 5-point Likert-scale questions in each section. Additionally, three open-ended questions were included and questions on gender, age, and team leader role. (See Appendix B.) The questions on alternatives to a team charter were designed to examine the concept of psychological contracts, or the possibility that unwritten rules of conduct were more effective than formal written team charters. Questions in the survey were based on the benefits of team charters reported in the literature. They were also designed to address gaps in the literature such as the quality and use of charters.

A mixed method approach was adopted to gain insights into team charter use from different sources in order to triangulate the findings. The quantitative analysis of the survey questions consisted of a combination of descriptive and inferential statistical analyses. NVivo software was used to analyze and code the students' responses to the open-ended survey questions. Although software can assist in sorting and categorizing textual data, the researcher is responsible for content analysis in terms of creating categories, identifying patterns and themes, and interpreting the themes. Content analysis is an "approach used for exploring large amounts of textual information unobtrusively to determine trends and patterns of words used, their frequency, their relationships, and the structures and discourses of



communication” (Vaismoradi et al., 2013, p. 400; see also Gbrich, 2007; Mayring, 2014; Pope et al., 2006).

The qualitative research tradition of phenomenology was applied to the qualitative analysis in this study. Describing the meaning of lived experiences of a concept or a phenomenon by individuals, with the purpose of reducing individual lived experiences with a phenomenon to a description of a “universal essence,” researchers develop a composite description of the essence of the experience, consisting of “what” they experienced and “how,” (Creswell 1998). Our goal in the qualitative portion of this study following this research tradition, was to examine the lived experiences of students related to their developing and implementing student charters and how the charters served to improve their ability to work well together on community-based learning (CBL) projects.

## Results

In total, 124 students completed the project charter survey and the midterm team evaluation survey. Table 1 below shows the categorized survey items and mean scores for all students in the sample, as well as when broken down into their year in school. For the purposes of this analysis, a sophomore ( $N=22$ ) is a student that has between 30-60 college credits, a junior ( $N=66$ ) is a student that has between 60-90 college credits, and a senior ( $N=36$ ) is a student that has more than 90 college credits. Survey item categories include: (1) Project Charter questions, (2) Project Process questions, (3) Project Dynamics questions, and (4) Team Dynamics questions.

Generally speaking, there were not many significant differences between survey item mean scores based on the student’s academic year. Additionally, of particular note is that there were not statistically significant difference in the mean scores of survey items based on either respondent gender or team role. However, in Table 1 below, we point out areas where there were statistically significant different mean scores on particular survey items in the four different survey item categories<sup>1</sup>. See Appendix C for the table with the complete results.

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<sup>1</sup> See Appendix C for the full descriptive results of all survey items, by academic year of respondent.

**Table 1***Summary of Statistically Significant Mean Score Differences of Main Study Variables, by Year in School*

Variable	Sophomore	Junior	Senior	Overall
<b>Team Dynamics – Midterm Survey</b>				
We give each other open feedback when needed.	3.95	4.06	4.31	4.11
<b>Project Charter – End of Semester Survey</b>				
Having a team charter was valuable.	5.50	5.00	5.33	5.19
Our team charter helped us clarify our roles and responsibilities.	5.50	5.11	5.28	5.23
The information in our team charter was useful.	5.45	4.89	5.19	5.08
<b>Project Processes – End of Semester Survey</b>				
We reviewed our team charter multiple times during the semester.	4.05	3.85	4.31	4.02
Our processes for what to do and how to do it naturally evolved over the semester.	5.32	5.44	5.69	5.49
Our informal rules for working together were more effective than the team charter.	4.95	5.42	5.14	5.26
I knew what to do on assignments.	5.91	5.64	5.61	5.68
<b>Project Dynamics – End of Semester Survey</b>				
We worked well together.	5.59	5.39	5.86	5.56
We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)	4.27	3.64	3.50	3.71
We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).	4.27	3.62	3.50	3.70
We had interpersonal conflicts (e.g., belittling team members, dismissing team members' comments, judging team members unfairly).	3.36	2.70	3.00	2.90

- *Team Dynamic Questions:* Senior students were significantly more likely to give each other open and direct feedback when needed.
- *Project Charter Questions:* Of note, sophomore students were significantly more likely to say that having a team charter was valuable, that the project charter helped the team to clarify roles and responsibilities, and that the information included in the project charter was useful. Sophomore students were also significantly less likely to use their project charter document throughout the semester.
- *Project Processes Questions:* Senior students were significantly more likely to allow their processes to naturally and organically evolve over the course of the semester, junior students were significantly more likely to say that informal rules for working together were more effective than the project charter, and sophomore students were significantly more likely to say that they knew what to do on their team assignments.
- *Project Dynamics Questions:* Senior students were statistically more likely to say they worked well together on the team project, while sophomore students were significantly more likely to say they had task, process, or interpersonal conflicts while completing the team projects.

### Regression Results

We wanted to understand student responses in relation to one key outcome variable: The Perceived Value of Using a Team Charter. In order to examine the determinants of this key outcome variable, an ordinary least squares (OLS) linear regression model was estimated via step-wise regression (a process for building a statistical model through adding or removing predictors to find the best-fit model), using the survey items listed in Table 1 above, for the entire sample, as well as broken down by the students' academic year at the university. Table 2 below shows the OLS model parameters for the "Perceived Value of Using a Team Charter," by year in school.

Of general note, the OLS models have *adjusted r-squared* values of 0.629 to 0.770, meaning each model predicts approximately 63% to 77% of the variability in the outcome variable. Additionally, key independent variables had very high levels of statistical significance across the OLS model and even when broken down to smaller samples by students' academic year in school. These results are especially notable due to the overall low total sample size ( $N=124$ ), with even smaller sample sizes when the same models were run by the students' academic year in school. It is also important to note that neither respondent gender nor team role was statistically significant and therefore was not included in the model.

As seen in Table 2 below, for sophomore students, "Our team charter had sufficient detail to guide us" (positive) and "We have effective processes to help us complete assignments effectively" (negative) had the strongest standardized beta coefficients and statistical significance in predicting the perceived value of using a project charter. For junior students, "Our team charter helped us make decisions" (positive) had the strongest standardized beta coefficient and statistical significance in predicting the perceived value of using a project charter. For senior students, "Our team charter had sufficient detail to guide us" (positive) had the strongest standardized beta coefficient and statistical significance in predicting the perceived value of using a project charter.

**Table 2***The Perceived Value of Using a Team Charter, by Year in School*

Variables	Beta Coefficient and Significance			
	Sophomore	Junior	Senior	Overall
Our team charter helped us make decisions.	0.231	0.551****	0.357**	0.461****
Our team charter had sufficient detail to guide us.	0.732***	0.242***	0.499***	0.355****
We had interpersonal conflicts.	-0.039	-0.159***	-0.200**	-0.148****
Working with my team members helped me learn and apply the course content.	0.207	0.229***	0.192*	0.242****
We have effective processes to help us complete assignments effectively.	-0.601***	-0.109*	-0.238***	-0.231****
<i>N</i>	22	66	36	124
<b>ADJ. R-SQUARED</b>	<b>0.629</b>	<b>0.789</b>	<b>0.822</b>	<b>0.770</b>
<i>F</i>	8.13****	49.58****	33.31***	83.49****

Beta Values; Significance Level: \* =  $p < .10$ , \*\* =  $p < .05$ ; \*\*\* =  $p < .01$ ; \*\*\*\* =  $p < .001$

### Qualitative Analysis

Data coding included the labeling and counting of categories and subthemes within the sample of 124 completed surveys as they were content analyzed. NVivo software was employed to evidence high frequency data themes under the CBL operational data themes. Highest frequencies (minimum of 3) of data themes under each of the categories and subthemes are presented in Table 3. It is important to note that while data frequencies are of interest, the most important value of the qualitative tradition of phenomenology is the richness that emerges through respondent comments as students describe their lived experiences related to developing and living by a student charter for a CBL project.

**Table 3**  
*Data Coding*

Data Category	Data Subthemes & Number of Responses
<b>Team Charter Benefits</b>	<u><b>Benefits to the Project:</b></u> Provided roadmap/guidelines for weekly production 68  Process clarification streamlining/organization 44  Clarified team vision 37  Clarified required skills 56  Facilitated attitude of continuous improvement 52
<b>Team Charter Learning Outcomes</b>	Importance of regular communication and meetings 88 Importance of working together cooperatively 66 Importance of being flexible 34 Learning from each other 32 Technology is a critical success factor 15 Charter facilitated mutual respect and teamwork 61

Table 4 provides a selection of memorable and representative student quotations related to this experience and a discussion follows. (Note: student quotations have not been edited.)

**Table 4**  
*Memorable Responses*

<b>Data Category&amp; Subtheme Coding</b>	<b>Memorable Responses</b>
<b>Team Charter Benefits: Project</b> Provided roadmap/guidelines for weekly production	“It was our guideline which we used to set goals and keep an orderly process for turning in assignments and getting the work done properly and timely.”
Process clarification streamlining/organization	“It gave us guidance and a sort of rubric to make sure were kept to what we were supposed to do.”
Clarified team vision	“It helped us know a process for completing our weekly assignments. It also helped us understand our roles to make sure that we got stuff completed and submitted on time.”  “ It allowed us to have a formula of how we would get work done.”  “It provided a clear vision.”  “Everyone was on the same page.”
Clarified required skills	“Our team charter helped our team to be unified in a single purpose. It guided our efforts throughout the semester.”
Facilitated attitude of continuous improvement	“ It helped us to know how to accomplish each assignment and task given.”  “Being open to finding a better way to do the work. Working with others only creates better outcomes.”

Table continued on the next page.

<p><b>Team Charter Learning Outcomes</b></p> <p>Importance of regular communication and meetings</p> <p>Importance of working together cooperatively</p> <p>Importance of being flexible</p> <p>Learning from each other</p> <p>Technology is a critical success factor</p> <p>Charter facilitated mutual respect and teamwork</p>	<p>“Making sure there was a form a communication between everyone. We were consistent with our weekly meetings. We clarified what was expected of each person. It made the work much easier to handle when everyone did their fair share of the work. We also were able to get more ideas that I would not have come up with myself.”</p> <p>“Being open to picking up other's tasks during hard times, and vice versa.”</p> <p>“Take advantage of technology. It is your friend in this day and age.”</p> <p>“The commitment from everyone. We helped each other understand the purpose and how to accomplish assignments.”</p> <p>“Clear communication channels that are consistent. Don't be inflexible with how and when you will work on your designated assignments. All viewpoints and ways of tackling a project are valid.”</p> <p>“Offer unsolicited help. Do your part then turn back around and help the next team member.”</p> <p>“A team full of hard-working dedicated teammates. Everyone was on the same page.”</p> <p>“Building friendships with the group.</p> <p>“I was better able to understand the concept because I got different perspectives and opinions on the theories in the eBook.”</p> <p>“Being open to finding a better way to do the work, working with others only creates better outcomes.”</p> <p>“We helped each other and had fun working together.”</p> <p>“We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective.”</p>
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### **Team Charter Benefits to the Project**

Major data themes representing benefits derived from using a team charter for the group project included the important role the charter played in providing an operations roadmap/guideline that assisted students in navigating through the semester long project. Data themes included the charter facilitating student clarification of goals and tasks, as well as the “how to” or process of executing the tasks. Students expressed that the charter enabled them to gain clarity in their big-picture vision of the project, as well as realizing the specific required skills required for execution. In addition, students expressed their appreciation for the charter providing them with a “continuous improvement” attitude toward the semester long project as they were learning and developing the project. Each of these benefits combined to lend a positive impact on the total quality and value of products designed and delivered for their community clients. One student summarized about the importance of the charter, “It was our guideline which we used to set goals and keep an orderly process for turning in assignments and getting the work done properly and timely.”

### **Team Charter Learning Outcomes**

Data themes in this study’s qualitative data related to learning outcomes centered around important benefits provided by using the charter as an operational guideline or “roadmap” throughout the semester as they worked on their clients’ projects. Students felt that the charter had not only facilitated improved group communication among team members in both frequency and quality, but the charter’s structure had also enabled them to gain clarity on the importance of working together cooperatively, being flexible, learning from each other, generating a culture of mutual respect and teamwork where “We helped each other and had fun.”

Another important learning outcome related to using the charters included their realization of the importance of embracing the use of technology to increase efficiency. By holding virtual meetings throughout the semester as designated in their charters, both the frequency and regularity of team meetings were increased where productive work was being accomplished. Finally, a very important learning outcome related to using the charters centered around students realizing that they had learned from each other. “We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective.”

### **Discussion and Implications**

The descriptive data shows that sophomores saw more value in team charters than juniors and seniors yet were less likely to use them, possibly due to less academic experience (e.g., credit hours and university courses completed) or not knowing how to use their charters. However, effective processes helped guide them on assignments. Seniors, who have more academic experience as they have completed more credit hours of academic study and are closer to graduation, did not rely on their charters to determine working processes but rather developed informal rules.



Differences across year in school were apparent related to the perceived value of charters. For sophomores, the detail in the charter predicted perceptions of charter value; additionally, the less effective their processes, the less value they saw in the charter. The implications are that charters need to be well developed and provide sufficient detail. For juniors, the variables of using the charter to make decisions, detail in the charter, and working with team members to learn course content led to perceptions of charter value. The lack of effective processes weakened perceptions of charter value.

Similar findings were identified for seniors but with detail having the greatest predictability in perception of value and lack of effective processes a negative relationship. These findings indicate that the quality of the charter in terms of detail, the use of effective team processes, the use of the charter in decision making, and team members learning together are related to perceptions of team charter value.

The literature points to the value of charters in determining mutual expectations (McDowell et al., 2011), goals, communication methods, and tasks, roles, and norms (Goodbody, 2005; Mathieu & Rapp, 2009; Moussa et al., 2017; Norton & Sussman, 2009, 2016). Recommendations for charter content have been proposed (Aaron et al., 2014; Bird & Luthy, 2010; Cheruvelil et al., 2020; Cupello, 1995; Norton & Sussman, 2009; Pilette, 2017). Charter benefits may depend on quality (Courtright, 2017; Kirkman et al., 2019), and reflection and performance reviews play a role (Andrade, 2019; Andrade, Miller, & Ogden, 2020; Andrade & Ziegner, 2021). However, limited research has established how student teams use charters and their perceptions of charter value or if factors other than charter contribute to perceptions of team effectiveness.

This study provides new insights into variables that predict students' perceptions of the value of charters. Some support was found that psychological contracts were adopted and effectively used (Holtham et al., 2006; Hunsaker & Hunsaker, 2010; Hunsaker et al., 2011; Robinson, 1996; Rousseau, 1989; Sverdrup & Scheil, 2015; Norton & Sussman, 2016), particularly for seniors with academic experience. However, the study also established that charter details, team processes, decision making, and collaborative learning are related to student perceptions of team charter value and that students need to enjoy each other and need structure in the form of a charter or in the form of unwritten but mutually understood informal rules. Identifying specific parameters for charter content and use is critical on the part of the instructor, particularly for students with limited academic experience. Greater flexibility in team management approaches may be appropriate for more mature students.

Limitations of the study are that it comprised students from a single university in one course. Future research is needed to further elucidate the impacts of team charters on team effectiveness in business education and to understand the variables impacting their use and student perceptions. This might include the involvement of the instructor and the degree to which students are trained to create a charter (e.g., see Feuer & Wolfe, 2023).

### **Conclusions and Future Directions**

Limited research has been conducted on the efficacy of team charters for student teams. As such, this study contributes to the body of scholarly work in management education and to teaching and learning

in higher education generally. The study informs approaches for helping students develop of teamwork skills, highly valued by employers (Hart Research Associates, 2018).

While previous studies on team charters tend not to capture the nuances of the lived experiences of individuals, an important contribution of this study included the lived experiences of students through their own words as they were challenged to develop and live by their own team charters for a semester. We learn more deeply and richly about human experiences when we engage them in thinking and expressing their own words, as compared to answering survey instrument questions alone. A rich quality of knowledge that likely could not have been attained through a quantitative survey instrument is attained.

This multi-method study has evidenced the inclusion of the development and application of student charters in student group projects leads to several important benefits, strengths and positive learning outcomes. Students' perceived benefits include the provision of a structured operational roadmap that clarifies team member roles, responsibilities, personal accountability, and a clarified team vision toward the project by team members as they are working in project production. Learning outcomes provided by team charters included the recognition of the importance of frequent and high-quality communication among team members, embracing technology for improved project efficiencies, and the recognition of the important role of students learning to enjoy each other as they are working together and learning from each other.

However, it was also evidenced in this study that the perceived value of team charters differs across years in school and tends to be higher for less experienced students. We found the importance of the charter being well developed with sufficient detail as critically important for less experienced and younger students. As students gained greater levels of education, experience and maturity, the value of team charters decreases. Upper-level students who have worked on more team projects in previous years tend to have grown to eventually feel more comfortable communicating openly with others without restrictive charter rules to follow. It would be useful in the future to determine which variables most strongly impact student perceptions and use of student charters by education level. Including the involvement of the instructor and the degree to which students are trained to create a charter before the projects begin would lend additional clarity (e.g., see Feuer & Wolfe, 2023).

Since this study strongly suggests that the perceived value of charter content and specificity varies significantly across years of student experience and maturity, additional research should be performed to specify important charter components across student school years. Specifically, charter characteristics and their content, as well as the best detail level contained within the charters across academic school years among students should be tested. Future research should also investigate student perceptions of what it takes to work cohesively together with teammates on large scale semester-long projects, as well as specific variables that predict student's perceptions of the value of team charters.

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## Appendix A

### Midterm Team Evaluation Survey

Indicate your level of agreement with each of the following statements.

5-point Likert scale: strongly disagree, somewhat disagree, neither disagree nor agree, somewhat agree, strongly agree

- We each understand our roles and responsibilities.
- We have effective processes to help us complete assignments effectively.
- We give each other open feedback when needed.
- We have clear goals and work together to achieve them.
- We are willing to sacrifice personal interests for the team's goals.
- We work well together.
- Learning with a team helps me learn better than on my own.
- Everyone on the team does his or her part.
- I need more guidance from my team leader.

#### *Open-Ended*

What is working well for your team? Name 3 things.

What do you think your team needs to improve? Suggest 2 or 3 things.

## Appendix B

### End of Semester Team Charter Survey

Indicate your level of agreement with each of the following statements.

5-point Likert scale: strongly disagree, somewhat disagree, neither disagree nor agree, somewhat agree, strongly agree

#### *Use*

Having a team charter was valuable.

Our team charter provided direction.

Our team charter helped us address conflict.

Our team charter helped us clarify our roles and responsibilities.

Our team charter helped us make decisions.

We used our team charter throughout the semester.

We did not use our charter after we initially created it.

The process of creating the team charter was beneficial.

#### *Quality & Training*

The information in our team charter was useful.

Our team charter had sufficient detail to guide us.

We needed more guidance on how to write a team charter.

We needed more guidance on how to use a team charter.

#### *A Living Document*

We reviewed our charter at midterm when we did our team reflection.

We made changes to our charter as part of our midterm team reflection.

We reviewed our team charter multiple times during the semester.

We made changes to our charter during the semester to reflect our actual practices.

#### *Charter Alternatives*

We would have been just as effective without a charter.

Our processes for what to do and how to do it naturally evolved over the semester.

Our informal rules for working together were more effective than the team charter.

#### *Efficacy & Clarity*

We each understood our roles and responsibilities.

We had effective processes to help us complete assignments.

We had clear goals and worked together to achieve them.

I believed in my team's ability to successfully complete assignments.

I knew what to do on assignments.

#### *Motivation/Enjoyment*

I was motivated to succeed in the course.

I enjoyed working with my team members.  
We worked well together.

*Conflict*

We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)

We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).

We had interpersonal conflicts (e.g., belittling team members, dismissing team members' comments, judging team members unfairly).

*Outcomes*

The ePortfolio assignments helped me learn and apply the course content.

Working with my team members helped me learn and apply the course content.

Our solutions and ideas were based on theories.

We were creative in our work.

*Open-Ended*

What helped you the most in working together as a team?

What role did the team charter have in your teamwork?

What do you wish you had done differently as a team or as an individual?

Gender

Age

I was the team leader. Yes/No.

**Appendix C****Table 1***Mean Scores of Study Variables, by Year in School*

Variable	Sophomore	Junior	Senior	Overall
<b>Team Dynamics – Midterm Survey</b>				
We each understand our roles and responsibilities.	4.09	4.23	4.31	4.23
We have effective processes to help us complete assignments effectively.	4.32	4.33	4.44	4.36
We give each other open feedback when needed.	3.95	4.06	4.31	4.11
We have clear goals and work together to achieve them.	4.36	4.33	4.25	4.31
We are willing to sacrifice personal interests for the team's goals.	3.73	3.82	3.83	3.81
We work well together.	4.23	4.33	4.47	4.35
Learning with a team helps me learn better than on my own.	3.32	3.56	3.53	3.51
Everyone on the team does his or her part.	3.91	3.68	3.97	3.81
I need more guidance from my team leader.	2.50	2.68	2.25	2.52
<b>Project Charter – End of Semester Survey</b>				
Having a team charter was valuable.	5.50	5.00	5.33	5.19
Our team charter provided direction.	5.32	5.05	5.36	5.19
Our team charter helped us address conflict.	4.55	4.74	4.81	4.73
Our team charter helped us clarify our roles and responsibilities.	5.50	5.11	5.28	5.23
Our team charter helped us make decisions.	5.00	4.62	5.11	4.83
We used our team charter throughout the semester.	3.95	4.27	4.67	4.33
We did not use our charter after we initially created it.	4.05	4.23	4.42	4.25

The process of creating the team charter was beneficial.	5.00	4.98	4.68	4.91
The information in our team charter was useful.	5.45	4.89	5.19	5.08
Our team charter had sufficient detail to guide us.	4.77	4.70	5.03	4.81
We needed more guidance on how to write a team charter.	4.18	4.14	4.50	4.25
We needed more guidance on how to use a team charter.	4.27	4.33	4.72	4.44
We reviewed our charter at midterm when we did our team reflection.	5.00	4.80	5.39	5.01
We made changes to our charter as part of our midterm team reflection.	4.36	4.27	4.97	4.49
We reviewed our team charter multiple times during the semester.	4.05	3.85	4.31	4.02
We made changes to our charter during the semester to reflect our actual practices.	4.05	3.80	4.33	4.00
<b>Project Processes – End of Semester Survey</b>				
Our processes for what to do and how to do it naturally evolved over the semester.	5.32	5.44	5.69	5.49
Our informal rules for working together were more effective than the team charter.	4.95	5.42	5.14	5.26
We each understood our roles and responsibilities.	5.27	5.39	5.39	5.37
We had effective processes to help us complete assignments.	5.45	5.50	5.44	5.48
We had clear goals and worked together to achieve them.	5.27	5.52	5.61	5.50
I believed in my team's ability to successfully complete assignments.	5.50	5.68	5.61	5.63
I knew what to do on assignments.	5.91	5.64	5.61	5.68
We changed our team roles during the semester (e.g., someone else took the role of leader or you switched your responsibilities related to planning, organizing, content development, design, editing, etc.)	1.50	1.53	1.61	1.55
<b>Project Dynamics – End of Semester Survey</b>				

I was motivated to succeed in the course.	5.86	5.71	5.97	5.81
I enjoyed working with my team members.	5.50	5.35	5.47	5.41
We worked well together.	5.59	5.39	5.86	5.56
We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)	4.27	3.64	3.50	3.71
We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).	4.27	3.62	3.50	3.70
We had interpersonal conflicts (e.g., belittling team members, dismissing team members' comments, judging team members unfairly).	3.36	2.70	3.00	2.90
The ePortfolio assignments helped me learn and apply the course content.	5.41	5.18	5.31	5.26
Working with my team members helped me learn and apply the course content.	5.55	5.06	5.31	5.22
Our solutions and ideas for the ePortfolio assignments were based on theories.	5.68	5.44	5.50	5.50
We were creative in our work.	5.55	5.52	5.92	5.64
<b>Team Dynamics – Midterm Survey</b>				
We each understand our roles and responsibilities.	4.09	4.23	4.31	4.23
We have effective processes to help us complete assignments effectively.	4.32	4.33	4.44	4.36
We give each other open feedback when needed.	3.95	4.06	4.31	4.11
We have clear goals and work together to achieve them.	4.36	4.33	4.25	4.31
We are willing to sacrifice personal interests for the team's goals.	3.73	3.82	3.83	3.81
We work well together.	4.23	4.33	4.47	4.35
Learning with a team helps me learn better than on my own.	3.32	3.56	3.53	3.51
Everyone on the team does his or her part.	3.91	3.68	3.97	3.81
I need more guidance from my team leader.	2.50	2.68	2.25	2.52

