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Feature articles

Custom executive education program charters: a beneficial task and useful template

Mark E. Haskins and James G. Clawson



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Clarity, compactness, and focus are hallmarks of messages that “stick” (Heath and Heath, 2007). Thus, the existence of “executive summaries” is attached to committee reports and even to audit investigations. Similarly, the “elevator pitch”, a phrase, is often used to encourage those preparing for a sales presentation to be crisp and on point. The charter template introduced here for custom executive education programs (CEEPs) provides a set of cues and a format for succinctly capturing and codifying the key agreements guiding the design, development, delivery, and monitoring of such a program. It provides guidance for creating a message that sticks, and answering the key question posed in a recent communications article with the provocative title, *The 7 Deadly Sins of Report Writing* (Feierman, 2012, p. 51): “What are the most important things to communicate about [a] topic?”

Nearly 50 years ago, a “charter of accountability” within organizations was introduced. It was presented as a “concrete document that clearly defines purpose, operating characteristics, and relationships [. . .] providing an instrument for continuous review, evaluation of performance, and from which operational plans are established” (excerpted from Scheid, 1965, p. 93). In short, charters offer a powerful focusing tool to managers of all kind. Charters provide a constructive way to create focus at an individual, a team, a department, a business unit, a project or as in the instance relayed here, a CEEP level[1]. And yet, in general, 50 years later, “Lack of focus is the most common cause of corporate mediocrity” (Gerstner, 2003, p. 219). CEEP charters help address this shortcoming.

Six component parts

Based on six decades of CEEP involvement and with the intent of facilitating purposeful, productive, engaging focus for CEEP teams, we have developed and use the following robust charter template which highlights six elements. First is “Mission”. This opening section calls for, in one pithy sentence, a statement of program purpose. It communicates the program’s core topical objective and target audience. This statement is largely driven by the program sponsor.

The second section is “Vision”. This section presents an aspirational statement regarding the program’s intended reception, quality, and effectiveness. It is a statement of dedication and service and is primarily the purview of the program provider.

Next is the “Values” section. This section summarizes the agreed-on core principles guiding the collaborative decision-making process between the program provider and client sponsor. It delineates the principles undergirding all interactions and the final program design.

The fourth charter section is “Strategy”. In short, this is a statement of how the program provider (and to some measure the sponsor) plans to achieve the program vision. This, often the longest section of a charter, provides the opportunity to clearly state the core commitments each party makes in addressing the details and tasks contributing to a successful program roll out.

A statement of “Operating goals” is the next section. This section provides an important focus on near-term milestones. Generally, this is most critical to specify for the period of time from initial client meeting through to the first program delivery. The purpose herein is to keep the key parties on task and on schedule so that it is known what must be done, by when and by whom. Such clarity facilitates meeting delivery dates and monitoring progress toward the vision.

The final section, “Leadership”, identifies the program’s key decision makers, point(s) of contact, and information source(s). This pertains to both the program provider and client sponsor. At a minimum, the names listed are those who have jointly crafted the charter’s preceding sections.

A dynamic document

Table I presents one example of a charter for an actual CEEP we designed and delivered for a *Fortune* 500 company (the company name is disguised, and the contents slightly

Table I Example of a custom executive education program charter	
Mission	The purpose of this program is to enhance the leadership abilities of ABC Inc.’s manager-level personnel
Vision	MIL program attendees will view this program as high impact, very desirable and as the best management education program they have attended. The program’s focus will be on: facilitating the development of an enterprise view, enhancing analytical business skills and the strengthening of interpersonal leadership capabilities
Values	The program will be based on the following three principles. It will be a <i>collaborative endeavor</i> between ABC Inc. and the University of Virginia’s Darden School of Business. The program will <i>engage participants in active discussions</i> on actual, relevant, and leading-edge business problems in an integrated curriculum design. The program design will <i>embrace four stages of learning</i> (individual, team, group, and reflection), and classes will draw on the experience of participants. Most classes will not use ABC Inc.-based materials, but all classes will provide an opportunity for discussing the connections to, and/or lessons learned for, ABC Inc.
Strategy	Perform a “needs analysis” with key, senior ABC Inc. executives Meet with, and have open access to, senior ABC Inc. executives during program design Careful selection of effective, high-energy faculty Create an effective and efficient information flow for faculty to stay current on ABC Inc. evolving business issues Conscientious planning to create an integrated, timely curriculum Careful selection of program participants in concert with, where beneficial, succession-planning and/or promotion and/or new position plans Attention to detail in lodging and other logistics Prior to full rollout, provide a condensed program offering for the senior executive group to garner their buy in and final thoughts regarding any adjustments Create means for timely post-program reviews, debriefs, and evaluations—program adjustments to be made as warranted and mutually agreed on
Operating goals	Faculty selected by January 1, 2014 (provider) Preliminary design by March 5 (provider) Executive interviews (January–April) (provider and client) Finalized objectives & design parameters by March 15 (provider) Finalized curriculum by April 3 (provider and client) Participant list by April 5 (client) Deliver program May 12–24 (provider) Program review June 15, 2014 (provider and client)
Leadership	ABC Inc.: Tom Smith, Ron Jones, and John Roberts Darden School: Mike Wilson (faculty leader) and Ann Reynolds (administrative director)
Note: ABC Inc. custom executive education program: Managing for Industry Leadership (MIL)	

modified). It is typical of those we have initiated and collaboratively refined with other program sponsors. The charter was written shortly after the first series of client meetings. It provided several benefits. It served to codify overarching program-related agreements between the parties and guided the initial program design and development. Later, it served as a useful reminder for subsequent program offerings' preparations – especially those of the program leader for whom the program was one of several. Similarly, every three to five years, the program was subject to a major review and those endeavors were pursued under the umbrella of the charter, which itself, was reviewed. The charter was also a useful document to share with newcomers to the team – it provided a succinct sense of the program's underpinnings. It also set an ongoing tone for the collaboration within and across the program provider and client teams.

A word of caution is needed. It is tempting to think that an agreed-on, succinct charter, such as the one presented here, is relatively easy to craft[2]. Sometimes it is. Many times it is not, for two reasons. First, the number of people involved (usually at least four – two each from the provider and client) can present a challenge. Each may come with slightly different agendas, and each has a distinct perspective. Indeed, [King et al. \(2013\)](#), in a study of 250 corporate mission statements from across the world, found wide variety in content, stakeholders addressed, and goals presented. So, developing meaningful consensus takes time and patience. Second, words matter. Certainly, the crafting of a charter should not be an exercise in wordsmithing, and yet, just as is true for business writing in general, clarity, conciseness, and specifics make a charter useful ([Canavor and Meiorowitz, 2005](#)). Taking the time and making the effort to forge a focused and substantive charter is time and effort well spent. Not doing so can contribute to subsequent confusion, erroneous assumptions, and even the dissipation of key players' program enthusiasm. Early in the development of a custom executive education program relationship, a charter fosters navigational direction, foundational cornerstones, and motivational purpose.

Keywords:

Executive education,
Charter,
Custom programs

Notes

1. For more discussion of charters in other venues, see [Clawson \(2012\)](#). Also, [Byrd and Luthy \(2010\)](#) discuss charters in a graduate business school team context, and [Mills and Woods \(2006\)](#) note the importance of a planning charter document in a hospital corporate college context.
2. Sometimes, both parties may prefer longer, more extensively detailed charters.

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Professor Mark E. Haskins teaches in the Darden School's globally ranked MBA and executive education programs. He has designed and delivered custom executive education programs for a number of well-known organizations inside and outside the US. He has numerous articles in business journals and is author of several books, including: *The Secret Language of Financial Reports*, *The CFO Handbook* (co-editor with B. Makela) and *Teaching Management* (co-author with J. Clawson). Mark E. Haskins is the corresponding author and can be contacted at: haskinsm@darden.virginia.edu

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