

Project charter template

Project name		Date	
Sponsor		Organisational coach	
Team members			
Strategic alignment	<i>[State how this project aligns to the strategy of your organisation/service]</i>		
Timeframe	Start date		Finish date

Project background

State the purpose and need for this work	
Provide background and evidence (data) to describe the problem/issue	
Where is it happening? Where is the opportunity? Who is impacted by it?	
State organisation/service/ consumer expectations, ie, what outcome is desired?	

Aim statement

<p>Outcome: Who will benefit and what will they gain?</p>	
<p>Timeframe: What is the timeframe (expected dates for key milestones and completion)? Have you been given this or are you setting your own timescales?</p>	
<p>Goal: Can you express your desired outcome in a goal?</p>	

Project scope

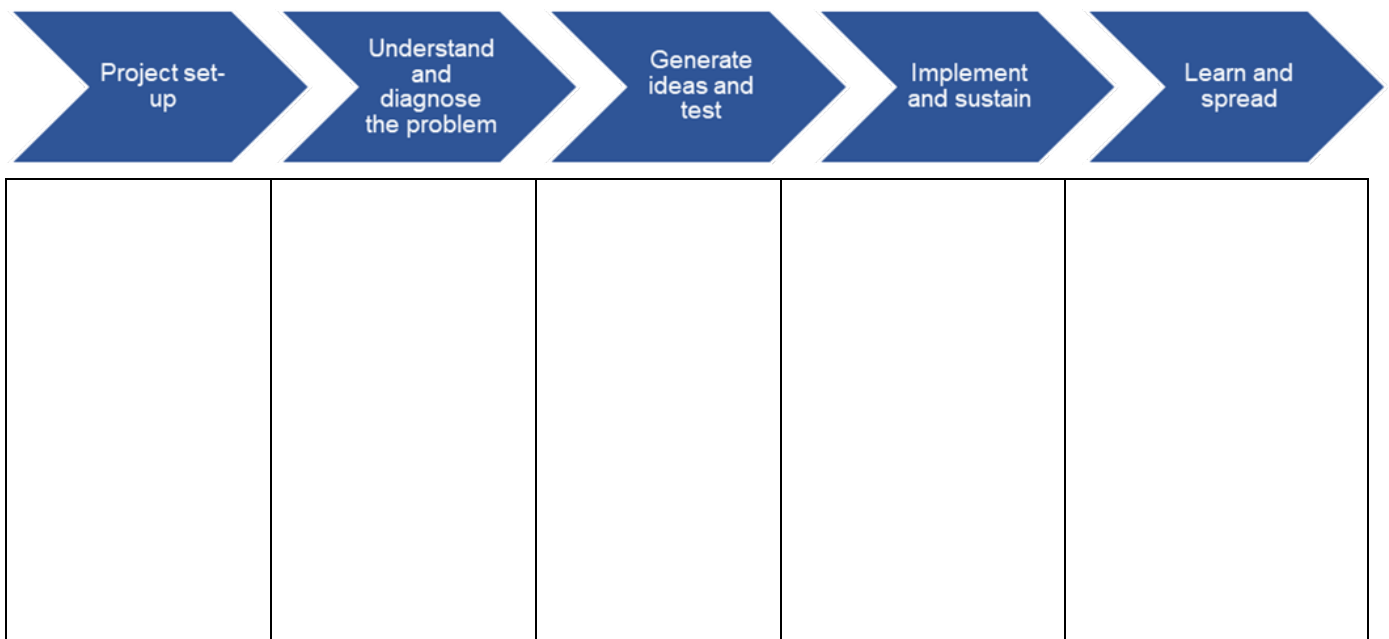
In scope		Out of scope	
<p>How many and what type of organisational units (units, departments, divisions, sites, etc) are involved?</p>		<p>Are any areas, consumers, processes, systems excluded from this project?</p>	
<p>Any specific consumers/conditions?</p>			

Organisation/service context

Time allowance		Resources required for project	
Outline the meetings and project activity (hours per week per team member)		Outline the resources required	
Key risks issues (including constraints)		Ethics and safety considerations	
Outline the key risks/issues/constraints		Outline any ethics and safety considerations	

Project milestones

Add target dates to the end of each phase and list key activities to be completed (this can also be done in a Gantt chart)



	Description	Measure	Current performance	Target performance
Outcome measure	<i>Eg, Reduce weight</i>	<i>Eg, Weight in kg taken on Monday morning at 7am</i>	<i>Eg, 73.5 kg</i>	<i>Eg, 68 kg</i>
Process measure	<i>Eg, Increase amount of time spend exercising</i>	<i>Eg, Minutes spent exercising per week</i>	<i>Eg, 125 minutes</i>	<i>Eg, 210 minutes</i>
Balance measure	<i>Eg, Time spent exercising in mornings may make me run late for work</i>	<i>Eg, Time arrived at work Mon–Fri</i>	<i>Eg, I never arrive late (after 8:30am)</i>	<i>Eg, No change – 100% arrival at work before 8:30am</i>

Sponsor sign-off

Project set-up	
Closure (learnings captured)	

Charter review checklist

Problem statement

- Has a need been clearly articulated? Have the symptoms and impact of these been described?
- Is evidence of the impact of the problem given? Has qualitative or quantitative data been provided?
- What does your baseline data tell you about equity for your different populations?
- Is it clear who the consumer/end-user of this process is? Does the background and problem statement articulate what they expect or why it is important to address this problem for them?

Project objective/aim statement

- Does the aim statement tell us how much (measurable), by when (timeline) and for whom (customer and scope is clear)?

Does it have the following features?

- | | |
|--|--|
| <input type="checkbox"/> The right area | <input type="checkbox"/> Specific scope |
| <input type="checkbox"/> Outcome focused | <input type="checkbox"/> Clear timelines |
| <input type="checkbox"/> Measurable | <input type="checkbox"/> Short and concise |
- Is it clear what success will be like (sensory language is used to describe the desired outcome)?
 - Does it avoid 'weasel words' such as: best practice, effective, evidence-based, excellence, quality, responsive, value-added, world class?
 - Is the aim phrased solely as a solution? For example, we aim to implement X. If so, is there evidence that the author and consumer are clear what the implied outcome is?
 - If the aim starts with an outcome, does it also include a solution? Look out for aim statements that say 'We will achieve X by doing Y' – where Y is a proposed solution to the problem. Ideally this should be avoided, but if a solution is included, has evidence been given in the charter for why this solution is expected to achieve the aim? Does the author appear aware that solution Y might not be all that is necessary to achieve the aim?
 - How will you engage consumers, whānau and staff in your project?
 - How are you considering and addressing equity issues as part of your project?

Measures

- Are there defined outcome, process and balancing measures?
- Does the outcome measure reflect what was described in the aim statement? Is it an appropriate measure for determining whether the improvement project is achieving the desired goal?
- Are there process measures that will inform how well the process is working? (Note, sometimes additional process measures will be identified when moving into testing ideas.)
- Have balancing measures been identified that can be used to detect a potential unintended consequence of the improvement project?
- Is the charter clear and concise?
- Were you able to understand the project from this charter?
- What questions did it raise for you?
- What does your data tell you about equity for your different populations?