**Project charter template**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project name | Click or tap here to enter text. | Date | | Click or tap to enter a date. |
| Sponsor | Click or tap here to enter text. | Organisational coach | | Click or tap here to enter text. |
| Team members |  | | | |
| Strategic alignment | *[State how this project aligns to the strategy of your organisation/service]*  Click or tap here to enter text. | | | |
| Timeframe | Start date Click or tap to enter a date. | | Finish date Click or tap to enter a date. | |

**Project background**

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

**Aim statement**

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| --- | --- |
| Outcome: Who will benefit and what will they gain? | Click or tap here to enter text. |
| Timeframe: What is the timeframe (expected dates for key milestones and completion)? Have you been given this or are you setting your own timescales? | Click or tap here to enter text. |
| Goal: Can you express your desired outcome in a goal? | Click or tap here to enter text. |

**Project scope**

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| --- | --- | --- | --- |
| **In scope** | | **Out of scope** | |
| How many and what type of organisational units (units, departments, divisions, sites, etc) are involved? | Click or tap here to enter text. | Are any areas, consumers, processes, systems excluded from this project? | Click or tap here to enter text. |
| Any specific consumers/conditions? | Click or tap here to enter text. |

**Organisation/service context**

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| --- | --- | --- | --- |
| **Time allowance** | | **Resources required for project** | |
| Outline the meetings and project activity (hours per week per team member) | Click or tap here to enter text. | Outline the resources required | Click or tap here to enter text. |
| **Key risks issues (including constraints)** | | **Ethics and safety considerations** | |
| Outline the key risks/issues/constraints | Click or tap here to enter text. | Outline any ethics and safety considerations | Click or tap here to enter text. |

**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)*

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| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

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

**Sponsor sign-off**

|  |  |
| --- | --- |
| **Project set-up** | Click or tap here to enter text. |
| **Closure (learnings captured)** | Click or tap here to enter text. |

# 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?

The right area

Outcome focused

Measurable

Specific scope

Clear timelines

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?