**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**

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| --- | --- |
| 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**

|  |  |
| --- | --- |
| 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**

|  |  |
| --- | --- |
| **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**

|  |  |
| --- | --- |
| **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?