Project Charter

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| Project Charter | Clear and accurate definition of a project is one of the most important actions you can take to ensure the project's success. Defining a project is a process of selection and reduction of the ideas and perspectives of those involved into a set of clearly defined objectives, key success criteria, and evaluated risks. |
| Problem Statement | A problem statement is a concise description of the issues that need to be addressed by a problem-solving team and should be presented to them (or created by them) before they try to solve the problem. A good problem statement should answer these questions:  1. What is the problem? What is the current situation or existing state of the problem? This should explain why the team is needed.  2. Who has the problem or who is the client/customer? This should explain who needs the solution and who will decide the problem has been solved. What is the impact of the problem on the people working within the system, on the organization and on clients/customers?  3. What is the desired state to be achieved by solving the problem? |
| Process Description | A brief description of what is involved in the current process and may include a high-level process map. |
| Scope | What is the scope and what are the limitations (in time, money, resources, and technologies) that can be used to solve the problem? |
| Timeline | When will the project begin and when is it expected to be completed? This may include timelines for phases or key milestones. |
| Sponsor/Process Owner | Generally a person in a senior leadership role. Person with capability to support the project and ensure its success. The sponsor is integral to the development of the project charter and works closely with the team leader to make the project successful. The sponsor typically reviews the project progress, approves recommended changes and provides funding, ensures that management systems can maintain the gains across the business, recognizes and communicates efforts. |
| Leader/Facilitator | The team leader helps the team work effectively as a team. The leader’s main responsibilities are to work with the sponsor and mentor to develop the project charter, plan meetings, keep the official team records, keep in contact with the team and the organization, including the sponsor, and follow a data-based method to solve the problem or improve the process. |
| Team Members | People working in the process, people without any process experience, people with diverse perspectives, people at all levels and responsibility. It is recommended that the team have at least 5 members and not more than 11. |
| Expert Resources | A person or people with particular expertise in the project area that can be brought in as needed to contribute, but do not necessarily need to be on the team. |
| Coach/Mentor | A person with continuous improvement or problem solving experience that can coach the leader and the team to be effective. |
| Goals | These are the targets to meet. Questions to ask and answer: What is it we want to achieve? When do we want to achieve it? What are your specific aims? Why are these goals essential to the project? Example of goals may be increase market share by 7% or reduce lead-time by 30%. |
| Deliverables | The fundamental objective of a project is to deliver something new. If the project is to create new products or modify existing ones, then the list of deliverable items may be as simple as a revised SOP or new user manual, or staff training by a certain point in time. |
| Metrics | Metrics that compare the previous condition to the solution. What you can measure about your project. The best metrics data will be continuous. Some meaningful metrics might be wait time, cost of poor quality (COPQ), customer survey, on time delivery, customer complaints, or DPMO (defects per million opportunities). |
| Communication Plan | Successful change management requires a lot of communication. Develop a plan for communicating the progress of your project. |

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| Project Charter | | | | | |
| Project Name: |  | | | | |
| Problem Statement: |  | | | | |
| Process Description: |  | | | | |
| Scope: |  | | | | |
| Timeline: |  | | | | |
| Sponsor: |  | | | | |
| Team Leader/Facilitator |  | | | | |
|  |  | Position | | Location | Discipline |
| Team Members: |  |  | |  |  |
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| Expert Resources: |  |  | |  |  |
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| Coach/Mentor: |  |  | |  |  |
|  |  |  |  | | |
|  | Goals: | 1. |  | | |
|  |  | 2. |  | | |
|  |  | 3. |  | | |
|  | Deliverables: | 1. |  | | |
|  |  | 2. |  | | |
|  |  | 3. |  | | |
|  | Metrics: | 1. |  | | |
|  |  | 2. |  | | |
|  |  | 3. |  | | |

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| **Communication Plan:** | Who | Frequency | Type/Format | Subject |
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