

# Project Charter: [Insert Project Name]

**Date/Version**:
**Division/Section/Unit/Program**:
**Executive Sponsor**:
**Project Lead**:

## Project Description/Statement of Work

What do you intend to do?

## Business Case/Statement of Need

Why is this project important now?

## Data Indicating a Performance Gap

How do you know a problem exists? Include all quantitative and qualitative data available. If data is not available, indicate how and when baseline data will be collected.

## Customers

| Customers (recipients of products or services) | Customer Needs/Requirements |
| --- | --- |
|  |  |
|  |  |

## Project Definition

### Project Goals

List goals that are specific, measureable, achievable, relevant, and time-bound.

### Project Scope

Indicate the first and last steps in the process. List what is out of scope.

### Project Deliverables

## Cost/Budget/Resources Needed

## Project Constraints/Risks

Elements that may restrict or place control over a project, project team, or project action.

## Implementation Plan/Milestones

Due dates and durations. Key milestones: Insert target dates and activities. Examples of activities are below.

| Date | Milestone |
| --- | --- |
|  | Draft project charter |
|  | Collect baseline data |
|  | Recruit project team |
|  | Convene team: finalize charter and review lean principles |
|  | Assess current state: map process |
|  | Identify inefficiencies and root causes |
|  | Brainstorm and prioritize solutions |
|  | Develop improvement theory/theories and action plan |
|  | Test improvements, make modifications, test again |
|  | Implement new process |
|  | Develop standard operating procedures |
|  | Monitor process: track metrics |
|  | Document future state |

## Communication Plan

What needs to be communicated? When is communication needed? To who? How?

## Change Management/Issue Management

How will decisions and changes be made?

## Customer Focus/Engagement

How will you engage customers in the improvement project?

## Equity Focus

Who may benefit from this project? Who may be harmed by this project?

How will affected stakeholders and communities be involved with this project? Who is excluded?

To what extent can the data about this situation or problem be broken down by race, ethnicity, socio-economic status, disability, etc.? What equity-related data is unavailable or missing?

What assumptions are we making about the equity components of this situation or problem?

## Project Team: Roles, Responsibilities

| Team Member | Role/Position | Anticipated Project Responsibilities |
| --- | --- | --- |
|  |  |  |
|  |  |  |

## Stakeholders: Roles, Needs/Requirements

| Stakeholder | Role/Position | Stakeholder Needs/Requirements (what do they want?) |
| --- | --- | --- |
|  |  |  |
|  |  |  |

## Sponsor Sign-Off

**Name**:
**Date**:

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