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# Define your project charter



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## What is it?

Another name for a project charter is a project brief or mandate. It is the first project document to be developed once you have identified the challenge and is written before the **project initiation document (PID)**. It can be as short as one or two pages and comprises the key elements of the project for the executive team/sponsor to sign up to. The project charter explains the reasons for the project, the expectations and limitations which apply.

## When to use it

You should define your project charter after identification of the problems/challenge and once it has been agreed that a project is required.

Following this and depending on the size of the project, you may need a PID, which is a much more detailed document. The PID is an extension of the project charter to include details of the project management team and risk analysis, plus a refinement of the business case for the project and the project plan. Small projects may not need a project initiation document, particularly if there is frequent informal communication with members of the project board or sponsors.

## How to use it

The project lead describes their understanding of the project. The key components to a project charter are as follows (depending on the project, you might not use all of these):

- Background – was this based on a business case/case of need?
- Aims/objectives – link your project aims to your organisational strategic aims and reference the benefits to the patient experience, clinical outcomes and quality.
- Scope and assumptions – for each of the categories (What? When? Where? How?), the project team discusses and records the agreed definitions of what will be included and what will be excluded and any actions required are identified.
- Constraints.
- **Measurement for improvement** and **driver diagrams** – link successes to objectives.
- **Action plan** – timescales with details of start, end and key deliverables and artefacts in between.
- **Issues and risks** – initial thoughts of what these might be.
- Project team – identification of project sponsor, project lead and project team (topic expert, finance manager, improvement expert, communication lead).
- Costs and likely timescales.
- Stakeholders – identify those that are involved, consulted or impacted.
- Deployment/business as usual – how and when will this project be embedded in mainstream?

**Figure 1: Project brief template**

<b>Prepared by</b>		<b>Date</b>		<b>Executive sponsor</b>	
<b>Project information</b>					
<b>Project aim</b>					
<b>Rationale</b>		(Provide reason for the project. Identify the problem to be addressed.)			
<b>Key area of focus</b>					
<b>Start date</b>			<b>Projected end date</b>		
<b>Project objectives (SMART)</b>					
Statements of specific, measureable, achievable, relevant, timely outcomes					
<b>Project scope – IN</b>			<b>Project scope – OUT</b>		

Figure 1 continued

Benefit		Measure		Stakeholder		
What is the benefit?		What is the measure?		Who benefits?		

Milestone	Start out	Define and scope	Measure and understand	Design and plan	Pilot and implement	Sustain and share
Target completion date						

Project team	Role	Time commitment

Additional resource requirements:
eg staff time, specialist/expert input, equipment and materials.

Additional information:

### What next?

Seek agreement and sign-up to the project brief by the project team and primarily the project sponsor and the other stakeholders.