

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, measurable, 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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To obtain this information in a different format, call: 651-201-3880.