

**KEY:**

- 1) Enter Project Name
- 2) Enter Business Unit, Location, Division, or other identifier.
- 3) Individual responsible for assembling team, driving the project and accountable for recommendations and results of team's effort. Assembles team and drives problem solving process and agenda. Assesses team's needs and team member performance.
- 4) Individual responsible for directing efforts of the team. Works with team leader to develop strategies, set direction and goals, acquire necessary resources and resolve barriers or conflicts. Monitors progress of team and makes adjustments as appropriate.
- 5) Describe the project that the team is expected to complete. What is the team expected to accomplish or deliver.
- 6) Describe the problem or opportunity prompting this project activity - in customer terms. Outline what the team is expected to develop or remedy.
- 7) Why undertake this project vs. some other activity?
- 8) List the project deliverables - the process or product changes to be implemented.
- 9) Qualify or quantify the desired outcome of the team's process or recommendations.
- 10) Describe the process affected by this project and identify the process owner.
- 11) Qualify or describe the geographic, organizational, physical or other boundaries of the teams reach and solution.
- 12) Who are the various internal or external customers of the team's process or impacted by the team's recommendations.
- 13) To the extent known, what outcomes or metrics do the customers expect?
- 14) List the steps that the team is expected to complete as part of the project.
- 15) Indicate preliminary dates for completion of the project milestones.
- 16) What are the expected business benefits, both tangible and intangible? Identify the categories impacted with a checkmark, then quantify if possible. Distinguish between one-time benefits and ongoing annual benefits. Provide a description to explain the projected benefits and their calculation.
- 17) List the participants on the team.
- 18) List the nature, time period and intensity of any auxiliary resources likely to be needed as the team progresses in its work. Estimate cost of any external resources required, e.g. consultants
- 19) Describe any material risks associated with the project
- 20) Who created/revised the Charter?
- 21) Note the date of creation and any revisions. Revisions should be approved and signed-off by the Project Champion.

## PROJECT CHARTER

<b>Project Name:</b> (1)	<b>Business/Location:</b> (2)
<b>Team Leader:</b> (3)	<b>Champion:</b> (4)
<b>Project Description/Mission:</b> (5)	
<b>Problem Statement:</b> (6)	
<b>Business Case:</b> (7)	

**Deliverables:** (8)

**Goals/Metrics:** (9)

**Process & Owner:** (10)

**Project Scope Is:** (11)

**Project Scope Is Not:**

**Key Customers:** (12)

**Expectations:** (13)

**Milestones:** (14)

**Completion Dates:** (15)

**Project Start:**

**Project Completion:**

**Expected Business Benefits:** (16)

Quantify

Explanation

<input type="checkbox"/>

Hard Cost

Soft Cost

Revenue

Speed

Compliance (CMS, JCAHO, AHA Guidelines)

Intangible (Reputation)

1-Time

Annual

**Team Members:** (17)

**Expected Resource Needs (Internal/External):** (18)

**Risk Assessment:** (19)

**Prepared By:** (20)

**Date (Last Revision):** (21)







