

Project Charter/Mandate Template

Document Control:

Role	Name	Date	Signature
(Author)			

Amendment History:

Issue Status	Version	Date	Actioned by	Discussed / Reviewed

Approvals:

This document must be approved by {insert}

Date	Version

Project Charter

Aim:		Team (Key Stakeholders)
Measures:		
		Executive/Divisional Sponsor: Senior Leader: Project Leader: Team Members:
Milestones	Goals	Other
30 days		Resources needed:
60 days		Potential Constraints:
90 days		

Introduction

The purpose of a Project Initiation Document is to describe the overall assessment and achievability of the proposed project. It will form the baseline for outlining the criteria required to achieve the aim. Describe this in relation to your aim, objectives and purpose

[Insert]

Background (Why)

Provide a brief summary of why you are undertaking this project/change.

What has instigated this? Try to relate it to any National Initiatives or the current local working situation

[Insert]

Strategic Objective

Outline how this project is linked to a strategic objective, policy, guidance or strategy.

[Insert]

Aim: (What)

An aim of an improvement project should be **SMART** and clear in describing the system to be improved, include a measurable numerical aim (e.g. percentage) and when you want to achieve it by (Target date).

[Insert]

Project Approach (How) Examples:

PDSA Cycles

- PDSA cycles of interventions to process failures; and develop, test, and assess whether the changes made are leading to improvements

Education and Training

- Raise awareness and education to staff. E.g. on-line training will be created for a wider range of staff to access

Driver Diagram

- A driver diagram will be created to determine and understand the drivers that influence this project

SPC Charts

- To track the progress of the tests of change being carried out via the collaborative working

Change Package

- A change package will include the interventions that have been successful via PDSA cycles.

Process Mapping

- Current processes and procedures to assess where improvements can be made

Key Stakeholders (Who)

The **Executive Lead** for this project is:

The **Senior Project Lead** for this project is:

The **Clinical Lead** for this project is:

The **Project Lead** for this project is:

Who do you need to engage with on a wider scale from the start of your project?

- Provide leadership on an operational day to day basis
- Have expert knowledge in relation to your project
- Extended service members that might influence the success of the project
- Safety/Risk or governance role
- Performance/information representative

[Insert]

Create terms of reference for agreement in roles, responsibilities and how people can work together to accomplish a shared aim. What is expected from each member? Be specific and create accountability for roles. Some examples you can add are:

- Strategic oversight of the project and a clear focus on the outcome which needs to be achieved
- Create the learning sessions and action plans as well as tracking progress
- Address obstacles/blockers from preventing PDSA cycles taking place
- Gather/collate best practice methods
- Ensure all appropriate services are in place and accountable for their role in the project

[Insert]

Scope (Where)

Where is the change going to take place? E.g. Department, wards...etc. If you want to create change in several areas/wards; start of small scale with a mixture of high and low performing areas.

[Insert]

Communication Plan

Draft a communication plan on how you will achieve this throughout your project:

Communication Activity/ Audience	Description	Person Responsible	Frequency	Timescales
E.g. Newsletter – wards impacted by project and all other staff	Newsletter detailing project progress to raise the awareness and achievements to date	Project Lead with Communications Team	Monthly News Letter to be created	Continuous

Current Evidence of Interventions

Have you considered checking on the Internet for proposed interventions that have been a proven success in supporting your aim? Do you have contacts at other Trusts who will be willing to share good practice? The interventions must directly relate to your aim

[Insert]

Outcomes to Achieve (Outcome Measures)

Please refer to the 7 steps to Safe Personal & Effective care for guidance on outcome, process and balancing measures. Briefly describe each outcome measures and how this measurement will be gathered:

[Insert]

Measurement Plan

The measurement plan provides specific details of how each measurement will be achieved. See blank Measurement Template in the Appendix of the 7 steps guide. Include: When each measurement will be collated, what it will show and how it relates to your aim and Who will be responsible for tracking/collating the measurements

[Insert]

Project Timescales and Key Milestones (When)

For most projects, it is recognised the timescales are not set to strict deadlines as the achievement of the project can depend on the input from a wide range of staff, services and the project implementation stages. However, outline below the key milestones you want to achieve and when by

Milestones	Target Date

Resources

Are there any resource implications that might need to be considered in the future? Do any of the proposed best practice interventions changes have a cost implication?

[Insert]

Department Approval

Is there a Committee or Divisional meeting that have to approve the project?

[Insert]

Risk/Constraints

Possible risks or constraints will arise during the implementation of the project and will need to be addressed at that stage. However, it's important to outline any early potential risks/constrains in achieving the project:

Potential Risk	Description	Level of Risk	Action required to minimize
Time constraints/commitment (EXAMPLE)	The time commitment needed from a wide range of staff to participate and lead on the Learning sessions and changes required	High	Plan of Stakeholder involvement to be designed prior to starting this project. Senior Leadership to be secured at the very early stages.
		Intermediate	

As part of the 7 steps, you will be completing other supporting documents such as a Measurement Plan or Driver Diagram. Add them to the end of this document as an appendix.

Once you have completed your Project Mandate, remove all the guidance so that you are left with just your Project Mandate

Also, go back to the start and complete the Project Charter template on the first page