Creating a Project Charter

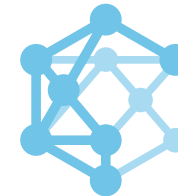Assured
Outcome
Delivery

Sharing the tools our team use successfully to enhance Clients' benefits realisation capabilities.......using an adaptation of the traditional Project Charter to ensure all involved in projects are clear on scope and purpose

2. Deliver Projects & Programmes Smarter

Assured
Outcome
Delivery

Implementing Smarter….

........Starting with a good Project Charter

Why develop a Charter?

The purpose of the Charter process is to define clearly. . .**why a team exists** and what are its principle objectives:

- to provide a Terms of Reference on a single page
- when we start a new activity area to gain a common view throughout the team
- to communicate to others the team purpose, who is involved, and the extent of our scope

Provide focus from the outset

An essential part of the kick off workshop:

- Aids in communicating purpose of the team
- Clearly communicates the scope
- Can aid in selecting participants (if the PM has drafted in his / her mind beforehand)
- Clarifies roles and responsibilities - as a basis for performance contract discussions – and establishing accountabilities:
    - Clearly defines expected outcomes (Show-Me Events)
    - Lists specific team deliverables
- Identifies potential risks and plan inter-dependencies at the start

It's a document that should be updated and maintained throughout the project

Charter Elements

Show-Me Event Outcomes	Deliverables	Who to involve	Scope	Critical Success Factors
• To…….. • To…….. • To……..	• X • Y • Z	• X • Y • Z	• X • Y • Z **Out of Scope** • X • Y • Z	• X • Y • Z

Development Hints and Tips (1)

- Outcomes
  - Describe what are we intending to do at a high level
  - Should be action oriented: To *…show me….*
  - Should be articulated so that any member of the team can use them to describe what the new activity is
  - See AOD tool ref 1.3
- Deliverables
  - Describe what will be there after the team has disbanded
  - Provide evidence that this activity has happened
  - Are tangible e.g. plans, Standard Operating Procedures, documented benefits etc
- Who to Involve
  - Can be either names or roles
  - Should consider all levels of staff (not just management)
  - Can include the core team working on the issue
  - Think about people who might be obstructive to the activity and then try and involve them
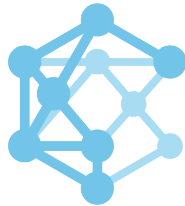
Development Hints and Tips (2)

- Scope – In / Out
  - Sets boundaries within which you operate
  - You can use them to include and prevent certain issues from being considered as part of the activity
  - Its often more important to document the Out of Scope (to help prevent scope creep)
  - It is not only physical scope but also can exclude certain issues

- Critical Success Factors
  - Helps to ensure the correct things are in place to enable success for this team
  - It is generally set-up and governance type issues
  - It helps to highlight where we might need to escalate issues if the critical success factors are not in place
  - These should be documented in the Risk Register

- Communications
  - Have the charter visible to help explain what the new activity is about
  - Publicise alongside Show Me Event Table in poster size

Example Charter for Manchester United, 2002-2003

Objective	Deliverables	Who to involve	In Scope	Critical Success Factors
To Win: • The Premier League • The FA Cup • The European Champions League all in one season	• 1 x Premier League Trophy • 1 x FA Cup • 1 x European Champions Trophy	• Barthez • Neville • Ferdinand • Brown • Veron • Giggs • Beckham • Scholes • Keane (captain) • Butt • Solskjaer • Van Nistlerooy	**Out of Scope** • **None identified**	• Tactical awareness • Healthy diet • Patience (from wives and girlfriends!) • Creativity • Team spirit • Dodge referees • Noise on the terraces • Sleep (i.e. no "laddish" behaviour)

Can the AOD Charter help start your projects smarter?

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