Project Management Charter Form

This project charter contains helpful elements for tracking and implementing any project. Use this cover page to plan your project. Once your project is finished, use the Project Assessment Tool found on the following pages to evaluate your project. You may also use this assessment for planning purposes to ensure you are meeting benchmarks.

Project Name	
Management Sponsor/Mentor (if applicable)	
Project Leader(s)	

Team Members and delegated tasks (add more lines as needed)	
Name	Role & Responsibilities

Project Description
Project Goals
Project Deliverables and Measures
How is this project related to your organization's goals and values?
Equity Impact Analysis: How will you identify and mitigate unintended consequences for low income communities and communities of color in particular? Are there other communities that stand to be disproportionately impacted by this project? How will the project address those impacts?
Stakeholder Engagement: Identify and list the names of the internal and external customers and stakeholders. List their needs, roles, and responsibilities. *Attach a separate sheet if needed.*
Implementation Plan / Milestones: *List due dates and durations of key items relevant to the project. Attach a separate sheet if needed.*
Potential barriers: What are the potential elements that may restrict progress? How will you mitigate these barriers?
Communication Plan: What are the key items that need to be communicated and to whom? When and how will these items be communicated? How and when will the team get feedback?

Sponsor/Manager Sign-Off

_____   Date: _____

Project Assessment Tool

LEADERSHIP AND ACCOUNTABILITY
An executive champion and an accountability methodology for senior leaders/team members for implementation and progress are important elements for successful change.

Who is the assigned leader?
Other leaders/team members who have impact on the initiative:
What outcome measures are being used to show improvement?

Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Executive champion for the improvement effort identified. Senior leaders and implementing managers are clearly held accountable for implementation and progress (e.g., performance plans, work plans, etc). Leaders support behavioral and system changes that address outcomes.	Agency has identified an executive champion for the improvement effort. No clear system of accountability for senior leaders or implementing managers.	Agency has not identified an executive champion for the improvement effort. No clear system of accountability for senior leaders or implementing managers.	

RACIAL EQUITY AND SOCIAL JUSTICE
Utilizing the Racial Equity and Social Justice Initiative Tool to analyze the effort for negative unintended impacts for people of color and low income communities is important. Has the agency made efforts to mitigate these impacts through their plan?

Date(s) RESJI tool was used to assess initiative:
Possible impacts or barriers to equity that were indentified:
Strategies implemented to mitigated impacts on low income or people of color communities:

Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Effort has been analyzed utilizing RESJI Tool. Strategies for preventing negative unintended impacts people of color and low income communities are clearly defined.	Effort has been analyzed utilizing RESJI Tool No clear strategies have been identified to mitigate impacts to people of color and/or low income communities.	Agency has not and does not intend to utilize RESJI Tool.	

STAKEHOLDER ENGAGEMENT

Soliciting feedback and ideas for improvement from stakeholder groups including senior leaders, supervisors, staff, unions/labor associations, individuals most impacted by the decision, and the larger community are important for delivering successful change.

Feedback, engagement and / or focus group methodologies used:			
Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Well-defined plans to solicit feedback, support, and ideas for improvement from all stakeholder groups. Those who stand to be most impacted by the change involved early and often in the feedback process.	Some plans to solicit feedback, support, and ideas from some stakeholder groups; but not clearly defined. Those who stand to be most impacted by the change not involved in the feedback process.	No plans to solicit feedback, support, or ideas from any stakeholder groups.	

ROBUSTNESS OF PLAN

Identifying key priority areas for improvement and creating action items that address challenge areas, as identified by survey data, and that address desired outcomes should appear in work plans.

What are the key priorities identified? Why were these areas selected?			
Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Agency has clearly identified or will identify key priority areas for improvement. Action items reflect challenge areas as identified by survey data.	Agency has used or intends to use survey data to drive actions but action items appear unfocused. Action items may or may not reflect challenge areas as identified by survey data.	Agency has no defined key priority areas. It is unclear whether agency has used or plans to use survey data. There are few or no action items.	

MEASURES FOR PROGRESS AND IMPACT

Defined measureable indicators of progress and their impact on both short and long-term outcomes are key. Quick wins, as well as long-term improvement goals and outcomes should be present in initiatives.

What are the measures of progress towards outcomes?			
Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Agency has defined or will define both qualitative and quantitative measurable indicators of progress and impact in both the short and long term. Agency plans for quick wins as well as long-term improvements.	Agency has defined some indicators of progress but may not be well defined. Plan may focus heavily on either short-term or long-term solutions but not necessarily both.	Plan does not contain any measures to gauge progress/impact. Agency has not clearly defined its short-term or long-term objectives.	

COMMUNICATION PLAN

The agency shared or will share employee survey results with all staff and/or community. Sharing Measures of Progress and Impact are also important.

Communication Plan outline: How will information be shared with all employees and stakeholders?

Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Agency has already shared and addressed employee survey results with all staff members, OR

Agency has a clear plan to share results with staff, OR

Agency has already shared this plan for improvement with staff, OR

Agency intends to share plan in the near future, OR

Agency describes how it plans to share measures of progress and impact with staff, preferably at regular intervals, AND

Community updates are also scheduled and planned. | Agency has shared employee survey results with only a limited number of staff members.

OR

Agency has a clear plan to share survey results with staff. | Agency has not shared employee survey results with staff or community, nor does it intend to address the results in any way, OR

Agency does not intend to share plans for improvement with all staff, OR

Agency does not intend to or does not indicate plans to share measures of progress with all staff, OR

Agency makes no mention of periodic updates for all staff, AND

The agency has no plans to share information with the larger community. | |

IMPLEMENTATION RESOURCES

The agency should allocate financial resources, staff time and specific responsibility to the improvement effort. The plan should specify milestones and clearly assign responsibilities for implementation.

Implementation Resource Plan:

Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Agency clearly describes the financial resources and staff time allocated to the improvement effort.

Resources adequately match requirements. | Agency indicates that it has allocated financial resources and staff time to the improvement effort, but actual amounts and sufficiency are unclear. | Agency has not indicated any allocation of resources or staff time to the improvement effort. | |

FEEDBACK AND REVIEW OF PLAN
Review of the plan should be scheduled and periodic updates and modifications made as appropriate to address changing conditions or requirements.

How is progress being reviewed and changes made?			
Proficient (2 points)	Basic requirements met (1 point)	Requirements not met (0 points)	Score
Agency clearly intends to monitor and control its plan over time. Plan includes periodic, scheduled reviews and times for adjustment.	Agency suggests that it will monitor its plan over time but has not described specific plans to do so. Plan suggests flexibility for changes over time.	Agency does not indicate that it plans to review progress or adjust plans over time.	

Adapted from:
Robert J. Lavigna. *Engaging Government Employees: Motivate and Inspire Your People to Achieve Superior Performance*. (2013)