Resource Optimization Project Charter

Use this fill-save charter to plan and communicate key elements of a **resource optimization project**. Start by entering the information you know right now. Add more info as your planning unfolds.

Date this charter was created [ ]
mm/dd/yyyy

Date of most recent revision [ ]
mm/dd/yyyy

1. BACKGROUND

Project title:

Why is this project being undertaken?

Who are the primary beneficiaries of this project?

What are the intended outcomes for this project?

Define what the project aims to achieve – in 3-7 plain language statements that describe the "end in mind"

2. PROJECT PARTICIPANTS

Project Sponsor(s)
Projects that involve two or more major areas are often co-sponsored

Team Leader(s)
Typically 1-2 people

Facilitator(s)
Typically 1 person, but can be 2 or more depending on the extent of the project

Team Members

Subject Matter Experts
People the team might call on to provide info, react to ideas, offer suggestions, etc

3. TIMELINE TARGETS*

First team meeting [ ]
Complete Discovery Phase [ ]
Complete Possibility Phase [ ]
Complete Planning Phase [ ]
Team Presentation [ ]
Begin Implementation [ ]

*See the last page for a project roadmap

4. SCOPE

What is covered and not covered by the project?

Additional boundaries or guidelines for the team:

5. DATA

Measures and metrics relevant to the project:

ADDITIONAL INFORMATION

Resource optimization projects address duplication of work, fragmentation, and silos.
The aim is to develop improvements that ensure coordination, efficiency, and the effective use of resources.

Roadmap for Resource Optimization Projects

1. ADVANCE WORK

The first stage is about setting up the project for success. The **project sponsor** takes the lead, with guidance from the facilitator.

DEFINE THE FOCUS

What function or service or capability is this project aiming to improve? Answering this question with clarity is essential. Ensure that the focus is ambitious yet achievable.

CREATE PROJECT CHARTER

The charter spells out key elements to get everyone on track and moving in the same direction. Included:

- **Project Title**: Concisely conveys the function, service or capability that is the focus of this project

- **Background**: Describes why the project is needed

- **Intended Outcomes**: Defines what the project aims to achieve – spelled out in several straightforward, plain language, non-prescriptive goal statements

- **Scope:** Explains what is covered and not covered by the project, along with any limits or boundaries

- **Data:** Provides a quantitative reflection of the current situation (This should be brief. Fuller data gathering will be done as part of the project.)

- **Participants:** Identifies who will fill key roles, including team leader(s), team members, SMEs, and others as needed

- **Timeline:** Sets expectations

Facilitator Role

Guide the advance work • Ensure complete charter

PROJECT CHARTER

A well-developed charter lays the groundwork for a successful improvement project.

2. IMPROVEMENT SESSIONS

The improvement work gets done in a series of team sessions led by a **facilitator**.

For resource optimization projects, the work path can vary somewhat, depending on what the project is aiming to improve. Most projects involve the following:

1st phase: DISCOVERY

Review charter and intended outcomes • Gather input from stakeholders to understand needs, wants, perceptions, suggestions, etc. • Study current capabilities and data for insights • As needed, create process maps and other visuals to deepen understanding • Identify and study gaps, over-laps, inefficiencies

2nd phase: POSSIBILITY

Research best practices and relevant benchmark data • Generate potential improvements: **immediate, short-term, longer-term** • Review effort/impact • Build consensus on go-forward improvements • Review with sponsor and other leaders as appropriate for feedback

3rd phase: PLANNING

Refine improvement set if needed • Develop implementation plans • Determine expected "before and after" impact • Finalize plans

Facilitator Role

Facilitate sessions to keep project moving forward

TEAM PRESENTATION

Teams sometimes conclude their work with a briefing for colleagues, stakeholders, and others.

3. IMPLEMENTATION

A designated **project coordinator** (often the team leader or other team member) takes it from here, guiding and coordinating implementation of the action plans.