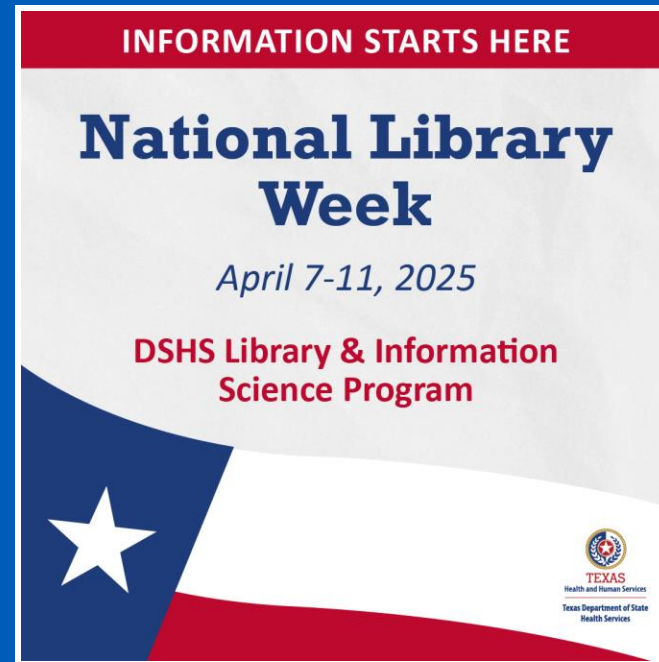
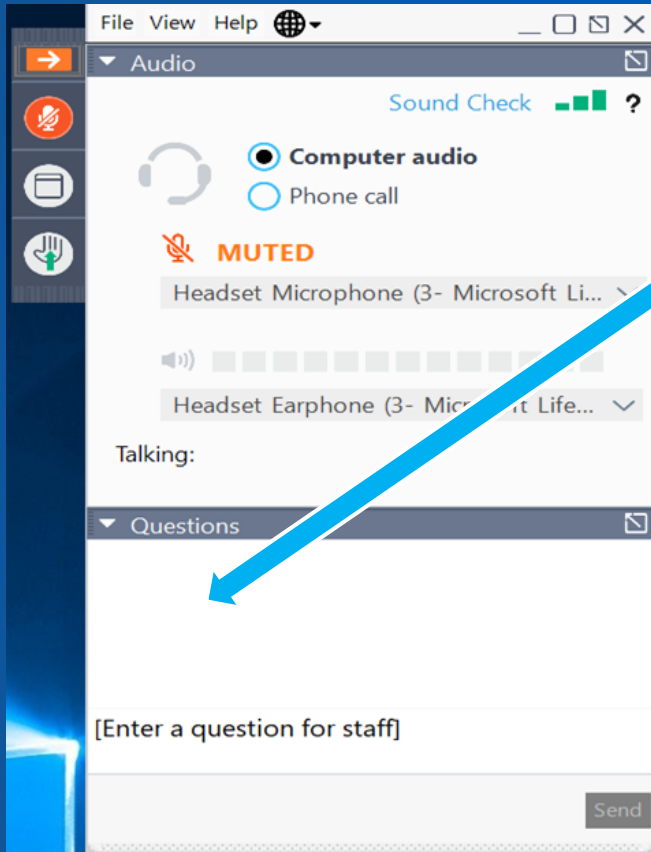



# Mile 1: Crossing the Starting Line with Project Charters



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# Mile 1: Crossing the Starting Line with Project Charters

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# **Mile 1: Crossing the Starting Line with Project Charters**

National Library Week

**Presenters: Emily Herrington & Lexie Perez**

# Overview

1. Purpose and importance
2. Project Charter tool
3. Best practices



Texas Department of State  
Health Services

# What is project management?

**Project Management** is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.



# Benefits of Project Management

- Stay organized
- Keep projects moving forward
- Deliver concrete deliverables
- Keep teams accountable
- Increase quality of project
- Serve as the objective person
- Build positive rapport



# PROJECT MANAGEMENT





Quote

“Trying to manage a project without project management is like trying to play a football game without a game plan.”

Unknown



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Services

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Health Services

# Project Charter

1. Description
2. Goal
3. Scope
4. Key Project Stakeholders
5. Project Team Expectations
6. Overall Project Objectives
7. Measures of Success
8. Challenges or Barriers



# Project Charter Defined

- 1. Description:** Brief overview of the project
- 2. Goal:** The primary aim of the project
- 3. Scope:** Defines project's boundaries
- 4. Key Project Stakeholders:** Individuals or groups with an interest in the project's outcome
- 5. Project Team Expectations:** Roles, responsibilities, and commitments required
- 6. Overall Project Objectives:** Specific, measurable targets
- 7. Measures of Success:** Criteria used to evaluate the project
- 8. Challenges or Barriers:** Potential obstacles or risks



# Project Description



A runner has decided that they are interested in running a marathon for the first time. Successful completion of this project will require considerable planning and coordination among several team members.

# Project Goal



1. Description

**2. Goal**

3. Scope

4. Key Project Stakeholders

5. Project Team Expectations

6. Overall Project Objectives

7. Measures of Success

8. Challenges or Barriers


*Project Goal: articulates main desired outcome*

The goal of this project is for the runner to complete a marathon race successfully and safely.

# Project Scope

1. Description

2. Goal

 **3. Scope**

4. Key Project Stakeholders

5. Project Team Expectations

6. Overall Project Objectives

7. Measures of Success

8. Challenges or Barriers

*Project Scope: specifies the work that must be completed to achieve the project's deliverables and desired outcomes.*

**In-Scope:**

- Identifying a race to participate in
- Identifying a training coach
- Executing a training plan
- Planning needed for race day support
- Completing the race
- Post-race reflections and physical injury prevention

**Out of Scope:**

- Runner developing their own training plan
- Straying away from training guidance provided by the coach and/or athletic trainer

# Key Project Stakeholders

1. Description

2. Goal

3. Scope



**4. Key Project Stakeholders**

5. Project Team Expectations

6. Overall Project Objectives

7. Measures of Success


8. Challenges or Barriers

*Key Project Stakeholders: Individuals that play a role in completing the milestones and activities.*

May include:

- Runner
- Coach
- Athletic trainer
- Training partner
- Running store associates
- Support system

# Project Team Expectations

1. Description
2. Goal
3. Scope
4. Key Project Stakeholders
-  **5. Project Team Expectations**
6. Overall Project Objectives
7. Measures of Success
8. Challenges or Barriers

*Project Team Expectations: A detailed outline of the roles and responsibilities expected and completed by each member of the team throughout the project.*

**The Runner will:**

- Identify appropriate training coach, training partner, and athletic trainer
- Maintain consistent communication with team

**The Coach will:**


- Develop a training plan
- Facilitate regular check-ins

**The training partner will:**

- Provide support and accountability for runner



# Overall Project Objectives

1. Description
2. Goal
3. Scope
4. Key Project Stakeholders
5. Project Team Expectations
-  **6. Overall Project Objectives**
7. Measures of Success
8. Challenges or Barriers

*Project Objectives: Describe the changes that will occur as a direct result of the team's specific project effort.*

By the conclusion of this project, the runner will successfully complete a marathon by:

- Identifying and securing members of the support team.
- Following guidance provided by all members of the support team.
- Maintain consistent communication with all members of the support team, ensuring that barriers and challenges are identified and mitigated as early as possible.

# Measures of Success

1. Description
2. Goal
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6. Overall Project Objectives
- 7. Measures of Success**
8. Challenges or Barriers



*Measures of Success: Metrics that will be used to assess the success of the project during and after implementation.*

- Runner identified the training team (coach, athletic trainer, training partner) and race prior to the first day of the training schedule.
- Runner completes the coach's training plan and the athletic trainer's injury prevention plan, straying from the outlined plan with only once variance per month.
- Runner can run a minimum of 20 miles two weeks prior to the marathon.
- Runner completes the race with support team in attendance.

# Challenges or Barriers

1. Description
2. Goal
3. Scope
4. Key Project Stakeholders
5. Project Team Expectations
6. Overall Project Objectives
7. Measures of Success



## **8. Challenges or Barriers**

*Challenges or Barriers: Includes any anticipated challenges that may arise at any point throughout the project that could affect the project's objectives.*

- Runner experiences an unpreventable injury affecting the coach's training plan.
- Runner has competing priorities arise in personal or professional life that prevents consistent following of the coach's and athletic trainer's training and injury prevention plans, respectively.
- Runner does not have receive volunteers from the support team to provide needed resources along the course.
- Inclement weather affects the race day course or schedule.



# Resources

- Certifications
  - [Project Management Institute](#)
    - Certified Associate in Project Management (CAPM) – Entry Level
    - Project Management Professional (PMP) – Senior Level
    - PMI Agile Certified Practitioner – Advanced Level
  - [Scrum Alliance](#)
    - Certified Scrum Master (CSM)
  - [Management and Strategy Institute \(MSI\)](#)
    - Lean Six Sigma Yellow Belt Certification
    - Lean Six Sigma Green Belt Certification
    - Lean Six Sigma Black Belt Certification
    - Lean Six Sigma Master Black Belt Certification



# Tips when approaching a Project

- All aspects of project management are interconnected
- Identify your champion and confirm their support
- Timelines and deadlines are your friends 😊
- Beware of Scope Creep 😞
- Plan your work and work your plan



# Review

1. Purpose and importance
2. Project Charter tool
3. Best practices



# Thank you!

Mile 1: Crossing the Starting Line with Project Charters

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