Real-World Project Charter/Definition Example

At Peregrine, we recently used this project charter/definition document for a project with a major US airline. Names have been changed for the sake of confidentiality, and some components have been shortened for the sake of brevity.

Name of Project

FlyMe ACS Learning and Development Job-aid Framework Design and Development

Problem/Goal Analysis

In November of 2018, Jeff Blanston, Director of Learning for FlyMe Air Lines ACS, expressed an interest in helping his team of training professionals improve the quality and effectiveness of the job aids (a.k.a. performance support tools) they use to help members of the FlyMe workforce perform in their job roles more safely and accurately.

Business Case

There are several business reasons for this initiative, but chief among them are the following[1]:

1. Given the year-over-year (YOY) increases in safety-related incidents and injuries that ACS has been experiencing lately, a focus on building more effective job-aids, and an associated framework, can go a long way toward enabling a culture of less risk, greater safety, fewer errors, greater consistency and more general work efficiencies.

2. Given the ACS field operation's challenge to ensure compliance with operational standards, more effective job-aids—as for example those used in the military and many other industries, including medicine and, of course, the airlines industry—are, if designed, distributed and used properly, a time-tested solution to compliance problems.

[*Components removed.*]

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[1] Sources: "ACS Learning and Development Learning Strategy" slide deck and personal conversations w/ Jeff Blanston and Tracy Baumgartner.

Objective

Outcome(s):	A framework for job-aids to be used by FlyMe ACS training team and clients/customers of the ACS training team.

Key Stakeholders:	Project Sponsor – Jeff Blanston
	Business Customer – Director of ACS, Dave Turnpike
	SMEs – Lead trainers
	End users of training – ACS field personnel

Approach:	Peregrine's standard approach to framework development

Benefit:	This project to impact the following ongoing business needs:

- Reductions in risk

- Reductions in errors

- Increases in safety

- Increases in customer satisfaction (internal and external)

- Efficiency gains from

    o   Just-in-time availability of job-aids

    o   Improved relevance to users

    o   Reductions in need to recall information

Conditions	In order for this project to be successful the following conditions must be met:

- Subject matter experts (SMEs) and accomplished performers (i.e., experts in the field) from FlyMe are available as needed during critical phases of the project.

- Adequate funding is available to accomplish project goals.

- The project is supported by FlyMe Air Lines executives (e.g., FlyMe leaders who have veto power over any component of the project are available for and included in reviews and discussions as needed throughout the project).

- Job aids produced as result of this project have consistent look and feel (e.g., branding) and are easily recognized as official ACS L&D job-aids.

- Periodic check-ins between Peregrine and FlyMe project team leaders occur and are used to achieve and/or confirm alignment throughout project.

- Peregrine consultants have access to required business information, materials and systems.

- Project stakeholders understand and agree that any changes to outputs, including additions, may require that the project be re-estimated and that such changes may result in foregoing features, adding additional resources, and/or extending the final delivery date.

Standards | The standards we will use for measuring success of this project are as follows:

- FlyMe ACS team sees improvements in key success metrics—e.g., reductions in errors and accidents, improvements in efficiencies, skill improvements/greater mastery of tools and techniques among team members—within reason.

- Key stakeholders are kept informed of project progress throughout the project.

- Highest-priority outputs are delivered first and within agreed-upon timeframes.

- At or before the end of the project, key stakeholders report that outputs meet or exceed their expectations.

- Outputs of project are considered complete and accurate.

- Evaluations from and/or observations from users of project outputs suggest (a) reasonable degree of satisfaction with outputs produced and (b) reasonable transfer of learning/skills to the field.

- The project team, throughout the project, considers working on the project a generally enjoyable experience. For example, when we arrive at the end of a phase or the end of the project, project team members are generally happy and satisfied (as compared to deflated and burned out) regarding their experience of the project.

Products/Outputs to Be Produced

The final job-aid framework will include the following:

- standards for determining outcomes of job-aid initiatives
- methods for aligning with stakeholders
- standards for job-aid formats and media
- standards for drafting job-aids
- design and development of job-aids
- recommendations for testing, revising and managing job-aids

Strategy

Peregrine plans to use their standard five-step approach to include the following stages: (1) entry, contracting; (2) discovery, data collection, dialogue; (3) feedback, decision to act; (4) implementation; (5) extension, recycle, or termination.

Phase 1 – Entry and Contracting

In this phase we determine and agree on the full details of project including:

- Scope of project
- Statements of presenting problem and objectives
- Required information and examples
- Conditions and standards
- Important roles and stakeholders
- Final outcomes/outputs
- Required support, involvement from FlyMe
- Schedule

[*Components removed.*]

Resources Requirements

Personnel

The personnel required are likely to be as follows:

- Project Sponsor (J. Blanston) – Est. 4 to 8 hours
- Business Customer (D. Turnpike) – Est. 2 to 3 hours
- SMEs – (T. Baumgartner, O. Mahatma) – Est. 20 to 40 hours
- End-users of training (x6) – 3 to 6 hours

Material

Required material resources likely to be:

- Example job-aids currently in use
- Existing course and facilitator evaluation documentation
- Example course materials – e.g., facilitator guides, participant guides, slide decks
- Train-the-trainer materials
- [*Components removed.*]

Reporting Requirements

- Daily summary email to current project team workers
- Weekly report to all stakeholders

Coordination Requirements

- Must avoid conflicts w/ ACS Leadership Academy rollout
- Keep Blanston in loop, weekly reports should suffice

Program/Schedule

Timeframes for this type of work can vary a great deal. To keep timeframes reasonably short (and costs to a minimum) it is essential that key project participants such as subject matter experts (SMEs) and accomplished performers (APs) be available as needed throughout the project. We would work closely with FlyMe ACS to help project stakeholders understand as soon as possible when, where, and for how long we would need project participants.

The table below contains an initial proposed schedule for this project. All dates are estimated and of course should be treated as only estimates.

Milestone	Date
Phase 1 – Entry and Contracting Complete	8 Feb
Phase 2 – Discovery, Data Collection, and Diagnosis Complete	28 Feb
Phase 3 – Feedback and Decision to Act Complete	8 Mar
Phase 4 – Implementation Complete	22 Mar
Phase 5 – Extension, Recycle or Termination Complete	29 Mar