

Faith Community Project Charter

INFORMATION SHEET

PROJECT NAME _____

DATE _____

Faith communities engage in projects to carry out their mission, strategic plan, objectives, and goals. Faith communities have a higher rate of project success when they choose projects wisely, charter them carefully, and manage them continually. When choosing a project, the community must reflect on whether the project will fulfill a specific community need. In addition, the community must evaluate whether they have the resources and time to successfully carry out the project. Once a project is chosen, project chartering is the next key step.

The project charter has 4 primary purposes:

- 1) It authorizes the project manager to proceed forward.
- 2) It helps everyone involved in the project to develop a common understanding.
- 3) It helps the project manager, sponsor, and team members make a commitment to do the project.
- 4) It can quickly eliminate projects. It is possible that once the project charter has been completed, the organization (or decision makers) may decide not to do the project based on limited resources (time, money, staff, volunteers, etc.), too much risk, different priorities, or other limiting factors.

The following information will help you understand the components of a Faith Community Project Charter.

PROJECT OBJECTIVE

The project objective contains 3 elements – scope, time, and cost. For example: To deliver a product or service (scope), by a certain date (time), within a certain budget (cost). Write the project objective in 25 words or less, which will ensure that everyone remembers it!

SCOPE OVERVIEW

This section answers the question “what.” The scope overview is an expansion on the project objective – focused on the “what,” also known as scope. What are you delivering? Give a high-level description of the product or service that the project will deliver. Include any requirements (or specifications) for the project. Requirements are the “must have” or “need to have” items related to the project. The scope overview can also list items that are “excluded” from the project – things that you are not going to do (out of scope).

PURPOSE

This section answers the question “why.” State the purpose of the project. Why are you doing this project? Where does this project fit into achieving the church’s mission? How will it lead to completing particular action items within a goal? This is an opportunity to justify the importance and necessity for doing the project. The intent is to persuade decision makers to support the project.

BACKGROUND

This section is optional. Expand on the purpose (why) this project is important. Include how this project supports the church’s mission statement, strategic plan, statement of faith, and/or “what you believe.”

MILESTONE SCHEDULE AND DELIVERABLES

This section answers the question “when.” The milestone schedule provides a high-level calendar of when key elements will be completed on the project.

- Deliverables/milestone -- Significant accomplishments or major pieces of work.
- Completion date: When you expect significant accomplishments (deliverables) to be completed by.
- Person who approves completion: The name of the individual or group who will judge the quality of the deliverable when it is completed.
- Acceptance criteria: Conditions that must be met for the deliverable to be approved.

Deliverable / Milestone	Completion Date	Person who approves completion	Acceptance Criteria

RISKS

This section answers the question “whoa.” It requires project leaders to pause, reflect, and document potential project risks. Risks are uncertain situations that might occur on the project – either positive or negative. When the project is underway, the project team will create a Risk Register, which will evolve and track risks while the team is doing the work.

- Project risk: Anything that might impact the project team’s ability to achieve the objective.
- Risk owner: The individual or group who is watching out for the risk or managing the risk should it occur.
- Contingency plan: The back-up plan or action steps that might be done should the risk occur.

Project Risks	Risk Owner	Contingency Plan
1.		
2.		
3.		

ASSUMPTIONS AND ASSIGNMENTS:

This section answers the question “whoa” and requires taking the time to pause and reflect before moving forward. What are you assuming will be in place for this project? Assumptions can involve a degree of risk or uncertainty since you are “assuming” or believing pieces or resources for the project exist – and are available. Since this section has a list of “assumptions,” the items in your list have not yet been verified or proven. In addition, people often make different “assumptions” when a situation is unclear, which can lead to confusion. Therefore, document your assumptions for clarity and assign a team member to verify your assumptions.

- 1.
- 2.
- 3.

STAKEHOLDERS

This section answers the question “who.” Stakeholders are individuals, groups or organizations who are impacted (or perceived to be impacted) by doing this project. For example, stakeholders could be the pastor, church members, church staff, and/or community members that your faith community is trying to reach.

There are 2 types of stakeholders:

- Primary stakeholders are key and need the team’s greatest attention.
- Secondary stakeholders are still important but at a lesser degree.

Stakeholders	Interest in Project
Primary:	
Secondary:	

RESOURCES REQUIRED

This section answers the question “how much.” How much will this project cost (funding)? What staff and volunteers are involved? What resources (equipment, space, etc.) are needed? What other items need to be considered?

- Funding _____ (\$\$ and/or hours)
- People (Staff, Volunteers, Other) _____
- Equipment _____
- Other _____

TEAM OPERATING PRINCIPLES

This section answers the question “how.” How will be project team work together? Create “ground rules” as a team so that everyone agrees, follows, and supports them. Consider doing a Shared Expectations exercise as a group. See the appendix for an example.

- _____
- _____
- _____

LESSONS LEARNED

This section further answers the question “how” to maximize the best way forward by learning from others. It refers to what has been learned from past (similar) projects -- to avoid previous mistakes made or to leverage things that went well.

- _____
- _____
- _____

COMMITMENT

This section answers the question “who.” The signatures of key individuals acknowledge their commitment and approval of this project.

- **Sponsor:** The individual who is authorizing this project to be done and providing the funding and resources for it.
- **Project Manager:** The individual who is leading the project team, and ultimately responsible for achieving the project objective.
- **Core Team Members:** The individuals who are doing the work on the project and supporting the Project Manager.

Sponsor	Ministry / Organization	Signature
Project Manager	Ministry / Organization	Signature
Core Team Members	Ministry / Organization	Signature

APPENDIX – EXAMPLES

SHARED EXPECTATIONS between Project Manager and Project Team

In starting together on this project and as a unified project team, our commitments to each other are listed below. This is in addition to our roles identified in the project plan, and ground rules for meetings.

What are your expectations of me as the Project Manager?	What are my expectations of you as Team Members?	What are your expectations of each other as Team Members?
<i>As your Project Manager...</i>	<i>As a member of this project team....</i>	<i>As members of this project team....</i>
I will provide the leadership to get the project done on time, within budget, and meet scope/quality.	I will complete my tasks on time, and deliver with high quality, according to the project specifications.	We will reach out for help, when needed.
I will respect your time by starting (and ending) meetings on time.	I will reach out to the project manager and other team members if I have questions.	We will work towards solving problems as a team, not individually.
I will seek the project team's input for meetings and distribute the agenda 48 hours in advance of the meeting.	I will utilize my talents and strengths toward the project.	We will respect and support one another and learn from each other.
I will provide opportunities for the project team to become aware of our collective strengths.	I will articulate my talents, my skills in my PM tool kit, and strengths that I bring to the team.	We will engage in strengths conversations to further develop our strengths as a team.
I will encourage all team members to develop and use their strengths on the team.	I will learn about and value the strengths of my fellow team members.	We will value what each team member brings to the team.
I will set clear goals/objectives and check-in with team member to ensure clarity and understanding.	I will continue to develop my project management knowledge and strengths.	We will apply our collective strengths as a team.
I will encourage participation by everyone.	I will take ownership and understand my part of the project.	We know that we are depending on each other for project and team success.
I will conduct fact-based discussions, through open and honest dialogue.	I will face the brutal facts and be willing to address them.	We will be worthy of the project manager's trust and respect in us, and not abuse it.
I will trust and respect each team member.	I will contribute to meeting agendas, attend meetings on time, and be prepared for group discussions.	We will communicate our concerns or information in advance to the project manager, to avoid surprises.
I will clearly communicate impacts (internal and external) to the project.	I will stay informed of the Issues Log and Decisions Log to avoid repeating.	We will keep our project documentation current and filed appropriately.
I will handle conflict quickly and expect the project team to resolve issues among the team before escalating to me.	When conflict occurs, I will focus on the problem (not the person) and resolve at the lowest possible level.	We understand that conflicts will occur, and it will not be taken personally.
I will provide opportunities for each project team member to learn and grow their PM knowledge and strengths.	I am willing to learn, listen, and apply new tools and techniques.	We will contribute to and respect the decisions that are made.

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SIGNED: Project Manager Susie Smith Team Member John Brown Team Member Pat Wilson

Team Member April Jones Team Member Joe Miller Team Member Robert White

GROUND RULES – EXAMPLES

Pick and choose ground rules that fit with the team. Modify and add your own ground rules.

100% focus and attention while meeting	Define acronyms	Make mistakes
5-minute rule (anyone can "call" 5-minute rule to close out a discussion that is going nowhere)	Differences or conflicts are handled positively	No backtracking for people who are late
Absenteeism permitted if scheduled in advance with the leader	Do not accept the first idea - go for the 2nd and even better the 3rd	No beepers or cell phones
Allow people to change	Do not retaliate	No finger pointing - address the process, not the individual
Appreciate other points of view	Don't discount others' ideas	No killer statement (don't shoot down ideas)
Ask a question when you have one	Don't interrupt someone talking	No side talking
Ask for what you need	Ensure everyone participates at least every hour	One conversation at a time
Ask questions	Everyone is equal	One person talks at a time
Ask why	Everyone is expected to help facilitate the meeting	Participate enthusiastically
Attend all meetings	Everyone is expected to participate and to respect and support the right to be heard	Phones and/or pagers on vibrate, instead of ring or beep
Avoid passing judgment	Everyone is responsible for the success of the meeting	Practice active listening
Avoid killer phrases like "we already tried that" and "it will never work here" and "yes, but...."	Everyone participates	Provide key point notes to participants
Balance consistency with flexibility	Feel free to share an illustration	Publish agenda and outcomes
Be a team player	Focus on goals, avoid sidetracking, personality conflicts and hidden agendas	Question and participate
Be an "adventurer" not a "prisoner"	Follow through	Relax
Be as open as possible but honor the right of privacy	Frequently check for understanding - summarize and/or paraphrase	Request an example if a point is not clear
Be honest	Full confidentiality	Respect differences and each other
Be open to ideas	Give feedback directly and openly	Review and agree on agenda at the start of meeting and then stick to it
Be open to new concepts and to concepts presented in new ways	Give freely of your experience	Rotate responsibilities
Be open to the ideas of others	Have a different opinion	Say "thank you"
Be punctual	Have fun	Share your knowledge
Be specific	Include everyone in the discussion	Share airtime
Be supportive of other team members and their contributions	Information discussed in our group is confidential	Share responsibility
Be supportive rather than judgmental	Interact	Share the limelight
Be willing to forgive	Job titles are left at the door	Silence and absence are consensus
Be yourself	Keep an open mind	Speak for yourself
Build self-esteem	Keep communications lines open	Speak up
Check assumptions before acting	Keep confidences and assume others will	Start and end meetings on time
Comments belong to the group	Keep discussion relevant	Stay focused on the tasks and the person at the moment
Comments made here stay here	Keep things specific, real, here	Take responsibility for your own learning
Communicate, communicate, communicate	Keep up to date	Use your time wisely
Confine your discussion to the current topic	Listen alertly and take accurate notes	Work towards understanding consensus
Criticize ideas, not people	Listen constructively	You are responsible for what we get from this team experience
Critique/evaluate meeting		You have the right to pass

SOURCE:

<https://www.albany.edu/cpr/gf/resources/icebreakers-and-introductions.htm>