Project Charter Template

This template provides a format for a project charter for your population health management technology project. Charters clarify a project’s milestones, estimated budget, timeline, and project participants, including who will provide approvals. Risks associated with the project also are described.

# How to Use This Tool

* For each section, fill in the information relevant to your project.
* Several sections have suggested entries. These are only suggestions. Make sure the charter reflects the realities of your staffing and resources.
* When you have completed the charter, share it with all the project team members. Make it available as part of your communication plan. Share with staff and board members as appropriate.

Project Charter: [*Name of Project*] Date:

# Purpose and Background

[*Why is your healthcare organization pursuing population health management technology? What problem are you trying to solve? What conditions or realities make selecting this technology a priority now?*]

*For example:*

Select and implement a population health management technology solution to support our ability to identify and manage patients with specific healthcare needs and conditions, including better provision of preventive services and management of chronic illness. We will be able to:

* Identify patients who incur high costs or who are at risk of incurring high cost
* Establish and monitor treatment plans that result in improved health and lower costs of care
* Help ensure preventive and chronic illness management services are provided and documented appropriately

This technology will advance our ability to use population health strategies in support of value-based care.

# Scope and Milestones

*[Describe the phases of work required and their milestones. Steps 3-8 from this guide are included in the table as an example*.]

**Start date:** [*project start date*]

**End date:** [*project end date*]

**Milestones**

|  |  |
| --- | --- |
| Phase | Milestone |
| Set Goals  | Vision and goals documented |
| Plan for Financing | Business case developed |
| Develop Requirements | Request for information developed |
| Compare Products | Vendor comparison completed |
| Select Vendor and Negotiate Contract | Vendor selected Contract signed |
| Implement Population Health Management Technology | Go-live |

**Out of scope:** [*Indicate what activities will not be included in this project.*] *For example:* This project will not evaluate functionality for campaign management of community health outreach.

# Key Stakeholders

|  |  |
| --- | --- |
| Title | Name |
| Sponsor - CEO or COO  |  |
| Project manager (likely fills another role as well) |  |
| High-level clinical leader (preferably a physician) |  |
| Chief operations officer |  |
| Chief financial officer |  |
| Health information technology manager or lead |  |
| Care manager/care coordinator |  |
| Others, including: consultants, a board member, nurse, other clinical staff |  |
|  |  |

# Project Budget

Describe assumptions for the main project expenses.

**Staff time:** [$$ or hours]

**Consultants:** [$$]

**Software/Vendor Solution:** [$$]

**Other costs:** [$$]

# Constraints, Assumptions, Risks and Dependencies

**Constraints:** [*Describe potential factors that will impact the delivery of the project*.]

**Assumptions:** [*Describe conditions or situations that you are relying on to achieve project goals*.]

**Risks and Dependencies:** [*What are the most significant risks? What things must happen before the project is delivered?*]

# Approval Signatures

[Name], Project Sponsor

[Name], Project Manager

For more information about the Rural Health Value project, contact:

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