Project Charters
Youth & Family Collective Practices

Introduction
The Youth & Family Collective (YFC) brings together organizations to empower youth, families, and nonprofits to learn, earn, and thrive. This initiative works to drive collaboration, foster connections, and build capacity for responsive youth and family programs. To date, the YFC has engaged over 70 organizations in the Greater Sacramento area in its network or collaborative projects. The YFC uses project charters as a tool to support its collaborative projects and programs.

Why does the YFC use project charters?
The Youth & Family Collective uses a project charter to support collaborative programs and projects. The project charter process helps guide conversations among different stakeholders that lay a foundation for collaborative work. It supports stakeholders in coming together to establish a common culture and vision for the work. It also serves as a living document to support mutual understanding of key project components, requirements, and roles and responsibilities as well as collaborative decision-making and communication.

How does the YFC develop a project charter?
Over the last two years we have done the project charter process virtually. We have used interactive online platforms like Mentimeter to support stakeholder engagement in the process and creation of the document. This process could also be facilitated in-person using tools like flipcharts and sticky notes. Depending on the project, some components can be drafted prior to or between meetings and then reviewed with the group. Certain components should always be created together with the group such as establishing the culture and decision-making processes.

Who is involved in making a project charter?
The Youth & Family Collective has all key stakeholders engage in the project charter process. At a minimum we request one representative from each partner/stakeholder organization. Ideally all key staff at partner organizations should attend and participate in the project charter process.

When is the project charter developed?
The YFC strives to begin each new program or grant award with the project charter process. If stakeholders are unfamiliar with each other, we do provide some space for introduction meetings or other information sharing. Ideally, the project charter process begins prior to program implementation or major decision-making in the program planning process.

What are the key components of the YFC's Project Charter Process?
The YFC continues to develop and refine its Project Charter Process and Tools. Each iteration of a project charter brings new lessons learned, new insights from partners, and opportunities to experiment with emerging practices from research/literature. However, YFC has identified ten key components of Project Charters that are consistently included in our process.

1. **Create a Culture of Collaboration, Trust, and Mutual Respect**
   We engage in culture and team building activities in the beginning of the project charter process. This includes defining community values and community agreements. We have also provided space for relationship building to support stakeholders in understanding individual and organization interest/passion for the work and project as well as experiences and assets that stakeholders bring to the group.

2. **Define the Big Vision of the Project**
   Identify or review the goal, objectives, key activities, and intended outcomes of the grant.

3. **Understand the Funding Source**
   Review the funding source and implications of the funding source with all stakeholders. The YFC has found it helpful for everyone to have an understanding of who the funder is, what is important to the funder, and requirements for funding.

4. **Identify Stakeholder Roles and Responsibilities**
   The YFC uses partner grids to outline roles and responsibilities of each agency. We outline key components or activities of the project and identify the organizations involved in each component.

5. **Outline Decision-Making Processes**
   The YFC engages stakeholders in conversations about decision-making processes often mapping out models and identifying types of decisions that are non-negotiable, collaborative, or can be made autonomously. We talk about how collaborative decisions will be made (consensus, voting, etc.) and also outline a process for decision-making if we can't agree as a group. Walking through these conversations early on in the project, helps create a framework for when difficult decisions emerge.

6. **Talk about Internal and External Communication**
   The YFC engages stakeholders in conversations about internal communication for project stakeholders. As stakeholders come from different organizations with different communication infrastructures and communication practices it is helpful to review these and establish specific practices for the group. This may include understanding the email/calendaring platforms used by stakeholders (e.g. Microsoft Outlook, Google Suite, etc.), establishing meeting schedules, or understanding team members' schedules. We also outline plans for external communication including any branding or funder recognition requirements, roles and responsibilities for external communication, and who and what can be communicated externally.

7. **Outline Key Components of the Evaluation Plan**
   The YFC typically includes key components of the evaluation plan that support understanding of the project. The Project Charter does not need to include the full evaluation plan. Identifying who is leading evaluation, if a third-party organization or local evaluator is being used, and/or if there are specific data collection systems or tools required by the funder. One topic that we have found important to work through is how and when data needs to be shared across organizations – especially in considering different IT platforms and confidentiality.

8. **Identify Other Resources Needed for Success**
   We brainstorm with the group other resources, support, or dynamics that should be considered for a successful project. Are there any other organizations or entities doing similar work? Is there a key service needed by program participants that partners do not address? Do additional partners or stakeholders need to be brought to the table?

9. **Big Picture Timeline**
   Mapping out key milestones such as the project planning process, program implementation, evaluation, and potential end dates or sustainability planning supports the group in understanding the lifecycle of the project.

10. **Map the Program/Project from the Perspective of a Participant**
    We use tools like [Miro](#) or Microsoft's Mural to map the participant experience. We have used flowchart templates to support the process. We look at how a participant engages in a program through various phases such as recruitment, programming, or graduation and how the participant interacts with each partner. We sometimes consider "gain points" or "pain points" for participant engagement at key points in the process.

Lessons Learned & General Tips
- There is no "right" way to do the project charter process and it is important to adapt to specific project needs, number of stakeholders, and types of organizations involved. Each project charter may be slightly different.
- The Project Charter process is more than a document, it's about creating space and engaging in intentional conversations about working together as a collaborative.
- The Project Charter should be a living document and reviewed regularly, especially if partnership dynamics or major project components change.
- It is important to allow space for informal relationship building in the process.
- Project charters do require time to complete, but the investment in time at the beginning of the project pays off.