

How to Use This Template

Why Can't I Change Anything? — This document is initially locked. To unlock, go to 'Tools', 'Unprotect Document'. The document is now unlocked and may be modified.

What Do I Do First? —

1. Save template under new name using common format; e.g. "Project Charter v0.1 (25 June 2014)"
2. Unlock document; customise headers & footers to your project (see below for instructions)
3. If desired, modify format of this template to reflect needs of your project – add or delete fields as required
4. Lock the document by clicking on 'Protect Document' in the 'Tools' menu, then select 'Forms:' and click 'OK'
5. Ready for your content – enter information in form fields; space expands as you type

How Do I Change Headers & Footers? — Double-click on header or footer (or click on 'Header and Footer' in the 'View' menu) to access the fields. Note that header/footer on first page is not linked to headers/footers on remaining pages. They need to be updated separately. Type over applicable text in current headers/footers to customise information (i.e. document title, version no., etc.); make sure to update the version information on the second page header each time you update this template.

How Do I Complete this Template? — Once locked, you will only be able to enter information into form fields (grey-coloured boxes) and you will NOT be able to change the headings or any instructions. Navigate through fields using 'Tab' key on your keyboard, or by clicking on desired field. Some grey boxes feature pull-down menus when clicked on. Please note that if you now unlock and re-lock the document, the data you enter in the fields will be lost. It is recommended that you only begin entering data when you have customised the template to your preferences and saved it with a different name.

Template Name & Number — The name of this template appears on top right of this page. The GTAC assigned number of this template is listed in bottom left corner of each footer. If you have questions about this template, or suggestions for improvement, use this information to help us identify the document you are referring to.

Questions/Suggestions? — Contact the Technical Assistance Unit, National Treasury, Telephone: (012) 315-5587; Email: ppminfo@gtac.gov.za or Website: <http://www.gtac.gov.za>

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You may wish to delete this box before re-locking your document.

About the Vision Statement

Before you start, follow the "How to Use This Template" instructions to customise this document to the needs of your project. This document provides a framework and prompting questions that will help you create a vision of the desired end state. A vision is a guiding image of success that should inspire those involved with the project—it is a foundation for new strategies and projects. It will support your change initiative and help you defend new strategies and tactics.

*This worksheet also serves as a "scratch pad" for your ideas before inputting them into the business case. Whole sections of this document can also be cut and pasted into the appropriate sections of the **Business Case** for fine-tuning.*

Review the Vision

The questions in this chart are designed to help you generate ideas for the vision for the project. This vision should be in line with the vision of your Department.

What would you like to see the department become, for its own sake?

What values would it embody?

What mission would it have?

How would people work together? (the interpretation of the values for this project)

Describe the Vision

Based on some of the ideas above, describe the vision of the project in the space below.

Examine the Vision

In the following box are some characteristics you may wish to consider when formulating your vision statement.

Tangible

Does it have imaginable, concrete attributes? Ask yourself, "Does our vision convey a clear picture of the future state?" Yes
 No

Desirable

Would it appeal to citizens, employees, customers and other important stakeholders? Can people answer "What's in it for me?" Yes
 No

Feasible and Flexible

Is the vision attainable? Ask yourself, "Does our vision leave room for initiative and alternative responses?" Yes
 No

Focused

Does the vision address the core problem and not only the symptoms? (Refer to the Need, Problem or Opportunity Statement) Yes
 No

Simple

Ask, "Can your vision be explained in five minutes or less?" Yes
 No