GROUND TO OAK | BUSINESS SOLUTIONS

Strategic Initiative Charter

Align stakeholders on why the initiative matters, what it includes, and how success will be measured.

CLIENT / ORGANIZATION: _____ **PREPARED BY: Trey Germano / Ground to Oak**

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1. Initiative Overview

Initiative name	Short, descriptive name. _____
Business sponsor	Person accountable for sponsorship and decisions. _____
Project lead	Person coordinating day-to-day work. _____
Business case	Why this initiative matters now. _____
Problem / opportunity	What is happening today and what opportunity exists. _____

2. Objectives & Outcomes

Objective 1	State an outcome that can be measured. _____
Objective 2	State an outcome that can be measured. _____
Success measures	Baseline, target, data source, and review cadence. _____
Out of scope	Work explicitly not included in this initiative. _____

3. Scope & Deliverables

Deliverable	Acceptance criteria	Owner	Target date

[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]

4. Stakeholders, Governance & Decisions

Key stakeholders	Name / role / contribution.
Decision rights	Who approves scope, budget, changes, and final outputs.
Communication cadence	Meetings, status updates, and channels.
Escalation path	How blockers and unresolved decisions are raised.

5. Timeline, Risks & Dependencies

Milestone	Target date	Dependency	Status / notes
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]

Top risks	Risk, likelihood, impact, mitigation, and owner.
Resources / budget	People, tools, funding, and capacity required.
Approval	Sponsor name, signature, and date (if used as a formal charter).