Everything in blue or between “<” and “>” is instructions you can erase once you’ve used them to build a draft of your charter.

Suggested filename for this document: “[your project name] Charter [month e.g. 08] [date eg 19]”. eg “Sales System Charter 0819”

Consider a 5-slide PowerPoint presentation to support this Charter and increase visibility to this important document, which is your “contract” as a PM with your Sponsor about what you will deliver.

PROJECT charter

Project Name: **<insert Project Name>**

Latest Update: **<insert Date>**

STATUS OF THIS CHARTER

bold one of below

Draft form, Charter not approved

Final, awaiting approval

Approved

List below any scope changes which have been incorporated into this version of the charter

EXECUTIVE SUMMARY

Provide a few sentences or bullets under each of the questions below. The bracketed items are just to help you consider which parts of the charter to draw from.

**Why are we doing this project? (Project Justification, Project Purpose)**

**What is included in this project (and what is not)? (Scope)**

**How do we know when we are done? (Scope, Completion Definition)**

**What do we need to be successful? (Critical Success Factors, Team and Stakeholder Summary)**

**Who needs to be involved (and how)? (Team and Stakeholder Summary)**

**When are the major milestones occurring?**

# Purpose of this Document

Note: remember to erase all blue instructions before publishing! And try to make body of charter less than four pages.

A project is ‘a temporary endeavor undertaken to create a unique product or service’. This is not the same as an ongoing effort which is more operational in nature. If your work is indeed a project, a Project Charter should be created by the Project Manager together with the Project Sponsor immediately at the outset of the project. You can keep it “alive”, as an open document, as the project evolves. Any change in direction or what’s included, should prompt you to revisit the charter, adjust it, and update the schedule & resourcing to address the changes.

The purpose of a Project Charter is to record agreement amongst the project team members and sponsors that the scope, assumptions, and limitations of the project are understood. It is the first task of a Project Manager to put a Project Charter together alongside the Project Sponsor. The Project Sponsor must approve the Charter before work proceeds.

If something happens which renders part of this document invalid, a new version should be published, and re-approved by the Project Sponsor prior to proceeding.

This Project Charter ensures that all project stakeholders share a common understanding of:

• Client’s need for [whatever the result of this project will be]

• The scope of this project [being . . . whatever it is . . . ]

• Roles, responsibilities and functions of [this project team]

Approval of the Project Charter by the Project Sponsor is required in order to terminate the “Project Initiation” phase of the project, and move into the project work.

If any changes occur that affect the content of this Charter, then the Charter must be modified. Change in one part of the Charter may affect any or all other parts of the Charter, including the schedule and scope. In this case a Project Charter Addendum will be prepared for Project Sponsor approval.

A sign-off sheet for the charter is available upon request.

# Project justification

Reference here the Business Case which has led to the need for this document. Ideally you can extract from a previous document, something to the effect of the following:

The problem of <problem description> affects <list of actors/stakeholders/etc affected by the problem> the result of which <description of the symptoms caused by the problem.> Benefits of <general solution to the problem> include <list of benefits>.

If this information is not available via any previous documentation, then you will need to create this information in short form here in the Charter.

# project purpose

A project purpose shouldn’t be much longer than a few sentences – any longer and the purpose is not clear.

(e.g. To consider: Does this project help with any of the following?)

Responsiveness to field needs

Identification of the right tools and developing a consistency in the tool set, which will impact field efficiency.

Help the field execute on increased sales.

# SCOPE

SCOPE DEFINITION / BOUNDARIES

First, the Project Manager and Project Sponsor examine the business drivers behind the project, clarify project goals and objectives, and agree what the success criteria for the project will be. Show a brief summary of the scope here.

The scope of this project is limited to the above items. All items not stated above are out of the scope of this project.

PROJECT COMPLETION DEFINITION

A project has a beginning and an end. This charter helps define the project at the beginning as well as how we will know we are finished: How will we know when this project is complete? Examples of a completion definition may include a document that is prepared, a document that is approved, a system is implemented to users that meets the requirements they defined, a recommendation is reached, and/or some other concrete deliverable or end state.

PROJECT ASSUMPTIONS

State here any assumptions you have made about the project scope, as a way of further clarifying the scope. You may find yourself updating this section several times as other parts of the charter get completed. As much as possible, try to be quantitative: say how MANY reports, how MANY users, etc.,

Depending on the type of project, you may not need both Assumptions and Critical Success Factors, but all projects need some kind of consideration for these matters, here in this section.

By defining assumptions the project team can challenge their validity and develop contingency plans should the assumptions prove to be false. If the assumptions prove to be true, the project benefits. If any assumptions prove to be false, the project suffers.

It is not necessary to say “all resources indicated as required will be available”, or “all design documents will be read and understood by the end user” if you have a sophisticated Sponsor and end-user community. However it can be helpful to use this section as an opportunity to highlight certain good practices if they are of concern.

Should any of the assumptions above be ‘broken’ then the high-level project plan will need to be updated, including any or all of dates, costs and timelines.

PROJECT CONSTRAINTS

State here any constraints on the project – particularly if one of the scope, time or cost are pre-determined. . . also a good place to state what the priority will be if one of these sides of the “iron triangle” must be constrained.

CRITICAL SUCCESS FACTORS

All of the following factors are critical to the success of this project.

* <list csf’s here>

# schedule summary

Either insert a picture of your level 1 & 2 WBS from MSProject, or describe it here. This section should include only the high-level schedule, as well as key dates and who is responsible for delivering these.

# Team and Stakeholders summary

MANAGEMENT TEAM

Name the Stakeholders, Project Sponsors, Project Owner, and Project Manager here. Do not detail the roles here as that is in the Project Plan.

PROJECT TEAM

Name the project team members and their roles here. Do not detail the roles here as that is in the Project Plan.

PROCUREMENT PLAN SUMMARY

Your project may require additional hardware, software, systems integration, or resources. The summary of the plan to involve any other organizations should be outlined here. The detail for this can go in the Project Plan.

# Risks Identification

This is optional but you may want to highlight some risks to the project at this time. A more detailed Risk Plan is prepared during the Project Planning phase.

# APPROVAL

Type ‘signed off’ here and the date, when you receive email sign-off back. File the email sign-off in the project repository in the Charter folder. Also type ‘signed’ in the bottom part of this page, next to their name.

Signature:

Name: Project Sponsor Name

*I agree that the scope as defined in this document is acceptable. I also agree to provide funding for this project as it is defined in this document.*

Signature:

Name: Project Manager Name

*I agree that the scope as defined in this document is acceptable. I also agree to assist in the delivery of the scope as it is defined in this document. I recognize that the responsibility for the delivery of the scope and the authority on this project rests with the Project Owner.*

# NOTES TO VERSIONS

| Version | Author(s) | Role | Date |
| --- | --- | --- | --- |
| 1.0 |  |  |  |
| Description of Version (or modifications) : | | | |
| 2.0 |  |  |  |
| Description of Version (or modifications) : | | | |
|  |  |  |  |
| Description of Version (or modifications) : | | | |
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| Description of Version (or modifications) : | | | |
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