

# Template: Project Charter

<b>Project Name</b>	<i>Project name</i>		
<b>Project Manager</b>	<i>Project manager name</i>	<b>Organization</b>	<i>Organization name</i>
<b>Sponsor</b>	<i>Sponsor name</i>	<b>Organization</b>	<i>Organization name</i>
<b>Executive Committee Sponsor</b>	<i>Executive Committee that is responsible for the project</i>		
<b>Document Version and Date</b>	<i>Version number and date of this document.</i>		

<b>Document Change Control</b>			
<b>Revision Number</b>	<b>Date of Issue</b>	<b>Author(s)</b>	<b>Brief Description of Change</b>

<b>Project Scope</b>	
<b>Business Need</b>	<i>Provide a brief overview and background information about the project. Explain at a high level what the project is to accomplish, who initiated the project and expected benefits (both tangible and intangible).</i>
<b>Project Goals</b>	<i>Identify the key project goals.</i>
<b>Product Description</b>	<i>Describe the product or service that the project is to deliver.</i>
<b>In Scope/Out of Scope</b>	<i>The scope sets the boundaries of the project. Enter those key items that are a part of the project and those major items that will not be worked on as part of this project. This is a high level description of what is in and what is out of the boundaries of the project.</i>
<b>Critical Success Factors</b>	<i>Identify the critical success factors for the project. Critical success factors are outcomes that must be achieved in order for the project to be considered a success.</i>
<b>Project Assumptions</b>	<i>List any assumptions made in defining the project. Assumptions can affect any area of the project including scope, stakeholders, business objectives and functional requirements.</i>
<b>Project Constraints</b>	<i>Summarize the key constraints that will serve as limitations and boundaries for the project team in their decision making.</i>
<b>Project Deliverables</b>	<i>List the key deliverables of the project with a short description of each.</i>

## Requirements

Identify the functional requirements here. Functional requirements describe what characteristics the proposed product or service must have and provides a list of the minimum features that must be in place when the project is complete.

## High-Level Milestones and Timeline

Milestones are deliverables or major events that may be readily identified as completed or not completed on a specified date. Project Milestones are 'how are we doing' thresholds that indicate whether a project is on track to finish as expected.

Enter the project's key milestones with an estimated date for the completion of the milestone.

Milestone/Task	<u>Estimated Completion Date</u>

Enter the roles and project responsibility for each role required for the project. Enter the skills required of the role. Enter the preliminary FTE estimates for resource commitment for the fiscal year. Enter a total of the FTE for the fiscal year. Enter the planned or recommended source for acquiring the resource.  
Example: Contractor or the name of the organization that might provide the resource.

## High-Level Roles

Role	Project Responsibility	Skills Required	FTE FY yy-yy	Recommended Source
<b>Total</b>				

Enter the preliminary budget information needed to support the project. Include costs for labor, material and other expense items. If the on-going maintenance and support costs are required by your project add this information to the high-level budget. The preliminary budget can also be broken down by major phases or key deliverables/milestones of the project.

## High-Level Budget

Cost Type	FY yy-yy	FY yy-yy	Total

<b>Total Budget</b>			

### **Communications Strategy**

*The communications strategy provides guidance in how to meet the ultimate end of project communication. Develop a high-level statement of the general approach to communications for key items:*

*Project Communication Objectives*

*Key Communication Message*

*Key Audiences*

### **Change Management Strategy**

*The change management strategy is a high-level statement of the general approach to change management issues for these key items:*

- *Anticipated change management challenges*
- *Key project constraints*
- *Key customer practices for managing change*
- *A concise statement of change management practices*

### **Risk Management Strategy**

#### Risk areas

*Describe at a high level the most significant areas of risk for this project.*

#### Critical stakeholder risk tolerances and thresholds

*Include this block if the stakeholders have identified areas of risk where either risk cannot be tolerated at all or for which the risk threshold is very low*

#### Risk management objectives

*Identify the project's overall objectives for managing risk.*

#### High-level risk management process

*Identify at a high level the process to be followed for assuring risk management objectives are met throughout the project life cycle.*

#### Risk decision makers

*Identify the roles for assuring risk management objectives are met throughout the project life cycle.*

## **Project Charter Approval Signatures**

#### **Project Manager**

(Signature)

Name  
Position

(Date)

Organization

**Project Sponsor**

(Signature) \_\_\_\_\_ (Date) \_\_\_\_\_  
Name \_\_\_\_\_  
Position \_\_\_\_\_  
Organization \_\_\_\_\_

**Potential Sections to add:**

**Quality Management Strategy**

*The quality management strategy provides guidance in how to meet the quality objectives of the project. Develop a high-level statement of the general approach to quality management issues for these key items:*

*Quality Objectives*

*Key Project Deliverables and Processes subject to quality review*

*Main Quality Standards to be used on the project*

**Issue Management Strategy**

The purpose of issue management is to minimize the impact of unplanned for events during project execution and control, and to ensure that issues that cannot be resolved by the project team are escalated appropriately.

*Option: describe at a high level any specific issue management goals for this project.*

*Identify the roles for assuring issue management objectives are met throughout the project life cycle.*

*Option: identify roles for developing the prioritization and escalation rules in the issue management planning activity.*

**Functional Readiness Assessment**

*<Describe the level of preparedness, including planning and knowledge transfer, of the functional project team. Further, describe the functional readiness steps taken for the project itself, including planning and resource allocation.>*

**Technical Readiness Assessment**

*<Describe the level of technical skill present on the team, the level of technical challenges presented by the project, as well as specific steps taken to prepare for the development challenges of the project.>*

**Measuring Success**

*List of metrics for measuring success of project*