* + **Analyze ONE of the following Project Charters (Note: you may have to cut and paste the URL into your browser):**

[*http://www2.cdc.gov/cdcup/library/examples-job\_aids/GAP%20Research%20Compendium%20Charter.doc*](http://www2.cdc.gov/cdcup/library/examples-job_aids/GAP%20Research%20Compendium%20Charter.doc)

[*http://old.northcarolina.edu/Intranet\_Project.docx*](http://old.northcarolina.edu/Intranet_Project.docx)

[*http://www.bridgewater.edu/files/BCEGG-Project-Charter.pdf*](http://www.bridgewater.edu/files/BCEGG-Project-Charter.pdf)

* + - **Evaluate the one you choose as follows:**
      * **How does the contents compare to the Project Charter requirements contained in the text and Figure 2.2?**

1. Project title should be concise and create a vision for the end result of the

project, such as Implement a Customer Relationship Management System, or

Install Wind Farm to Support Energy Needs of Bioprocessing Facility in

Europe. If there is a concern about confidentiality or proprietary competitive

information, a company many give the project a generic title such as

Capacity Expansion, or a government military agency may refer to a project

as Project 824 for security reasons.

**Project title is clear.**

2. Purpose summarizes the need and justification for the project. It may

reference prior documents regarding the rationale for selecting the project.

**Allow staff to share information more efficiently and effectively across countries.**

3. Description provides a high-level description of the project. It may include a

description of the major tasks or work elements or phases of the project or even

a preliminary work breakdown structure delineating the major work elements.

For a project to develop and launch a new food product, the major work ele-

ments may be Concept Development, Feasibility Assessment, Ingredients

Selection, Preliminary Formulation, Prototype Development, Final Formula-

tion, Produce Sample Lot, Test Market, Final Reformulation, Production, Mar-

keting Support, Training, and Distribution and Logistics. The project charter

may reference other more detailed documents that are available regarding key

performance requirements, prior studies, and so forth.

4. Objective is a statement of what is expected to be accomplished—the end

product or deliverable. It can indicate the amount of funds authorized for the

project and the expected completion time (either as a specific date or length

of time in weeks, months, etc.). An objective might be to launch a new

website in eight months for an amount not to exceed $100,000.

5. Success criteria or expected benefits indicate the outcomes or expected

quantitative benefits that will result from implementation of the project.

They describe the sponsor’s expectations regarding measures that will define

success for the project. Examples include achieving a sales volume of 500,000

units within 12 months after the launch of a product, reducing the waiting

time for patients in the emergency room by 40 percent, reducing annual

energy costs by 50 percent after installation of wind farm, or handling 10,000

cases in a new clinic in the first year after it opens.

6. Funding indicates the total amount of funds the sponsor authorizes for the

project. Sometimes the funds are released in stages depending on the progress of

the project. For example, a project may be authorized for $2,000,000 with

$500,000 released for phase 1 up through preliminary design. Funding for sub-

sequent phases will be based on satisfactory progress and results of prior phases.

7. Major deliverables are the major end products or items that are expected to

be produced during and at the completion of the performance of the project,

such as concept sketches for a new zoo, a website, a simulation of the work-

flow for the production system in a new motorcycle manufacturing plant, the

photos or final text for an annual report, an electronic medical records sys-

tem, or a promotional video.

8. Acceptance criteria describe the quantitative criteria for each major

deliverable that the sponsor will use to verify that each deliverable meets certain

performance specifications and are the basis for the sponsor’s accepting that the

deliverable is indeed done correctly and meets the sponsor’s expectations. For

example, a new production line will achieve 99 percent uptime during a 30-day

acceptance test period, an information system will process up to 10,000 trans-

actions per second without any degradation of response time, or the text for a

marketing brochure does not exceed 400 words and is written at a fifth-grade

reading and comprehension level.

9. Milestone schedule is a list of target dates or times for the achievement of key

events in the project timetable. For constructing a new office building, the

key milestones and their target completion times might be:

Baseline plan month 1

Architectural concepts month 2

Preliminary design and

specifications month 4

Order long lead items month 5

Final design specifications month 8

Complete excavation and foundation month 10

Complete steelwork and concrete

work month 14

Complete exterior month 16

Complete utilities month 18

Complete interior month 20

Complete landscaping month 20

Complete furnishing month 22

Move in month 24

Some projects are segmented into phases. For example, a project to develop

and build a website might have the following milestone targets for

completion of each phase:

Phase 1 Preliminary design March 31

Phase 2 Detail design June 30

Phase 3 Construct website August 31

Phase 4 Test and accept September 15

10. Key assumptions include those that the project rationale or justification is

based on, such as a new medical device will receive approval from the

regulatory agency. Or an assumption could be about resources for the

project, such as the company will be able to secure financing for the

construction project at an interest rate of 5 percent or lower.

11. Constraints could include such things as a requirement to complete the

project without disrupting the current workflow, or the necessity to out-

source a project because the organization does not have the appropriate

expertise or capacity to perform the project with its own staff. Another

constraint might be that certain project team members will have to obtain a

specific level of government security clearance to work on secret portions of

the project.

12. Major risks identify any risk that the sponsor thinks has a high likelihood of

occurrence or a high degree of potential impact that could affect the

successful accomplishment of the project objective. As an example, if a

project requires the integration of several technologies in a way that has not

been done before, there could be a significant risk that it may not work and

cause a delay and additional costs to the project because of redesign, or even

result in terminating the project.

13. Approval requirements define the limits of authority of the project man-

ager, such as the approval of all purchase orders or subcontracts of more

than $25,000 require the approval of the board of directors. Approvals

may also be required for a project to move from one phase to the next.

As an example, at the completion of phase 1, the external contractor

must present the results of phase 1 to the sponsor’s executive committee

and obtain the committee’s approval before starting work on phase 2 of

the project.

14. Project manager is an individual in the organization who has been identified

to be the manager for the project. The project manager’s initial work is to

organize a core team to do the planning for the project. If the project will be

outsourced to an external resource (contractor), then the sponsor’s project

manager will prepare a request for proposal. It is also not unusual for the

sponsor to identify the project manager early in the initiating phase of the

project life cycle; the project manager would participate in preparing the

project charter.

15. Reporting requirements state the frequency and content of project status

reports and reviews. For example, the project manager must provide monthly

written status reports to the sponsor or have quarterly status review meetings

with the sponsor.

16. Sponsor designee is the person who the sponsor designates to act on behalf of the

project sponsor. The designee is the individual with whom the project manager

would communicate and to whom the project manager is accountable. The

sponsor may also authorize the designee to sign off on the acceptance of the

project deliverables. If a corporation’s board of directors sponsors a $10 million

project to implement a new financial reporting system, the board may designate

the corporation’s chief information officer to be its designee to oversee the

project on the board’s behalf; the project manager would be accountable to this

person.

17. Approval signature and date indicate that the sponsor has officially or for-

mally authorized the project. Depending on the funding amount of the proj-

ect, level of risk, or organizational reporting structure, the signature might be

that of the company president, marketing director, or manager of the informa-

tion technology department, for example; or it might be that of a not-for-profit

organization’s executive director or the deputy secretary of a government

agency. The approval date on the project charter is significant because it is

considered to be when the clock starts for accomplishing the key milestones by

their target dates.