# Project Charter Template

**Project Charter For**: <Project Name/Purpose>

**Document Created:** <Date>

**Author:** <Author>

**Distribution:** <Distribution List>

**Revision History**

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| --- | --- | --- |
| Revised By | Date | Comment |
| <Initials> | <Date revised> | Comments… |
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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Start Date | End Date | Project Manager | | Client |
| dd-mon-yyyy | dd-mon-yyyy | Initials | Client/Stakeholder(s) | |

# Introduction

## Purpose of the document

*[You can use the boilerplate text below or replace with your own wording]*

This document provides the information necessary to frame the project in the context of its scope, purpose, funding, resource requirements and approval. This document target audience is the major departmental stakeholders and decision makers in the leadership team.

## Project Overview

State the purpose followed by the where, when and how of the project together with the estimated budget and affected/participating stakeholder groups.

## Business Case

State the business case here. If you are creating a document as sophisticated as a Project Charter it is likely that there is a separate Business Case document (and possibly presentation slides and spreadsheets). You should reference any relevant business case documentation here for the audience.

The business case should state the problem or opportunity that the business is addressing, the likely benefit, the cost associated with achieving the goal(s) and set out the ROI in clear terms. If the project is only a small part of the business case then it should be made clear in the Project Charter that the project is part of a larger strategic initiative, which might be described depending on sensitivity.

# Project Scope

## Objectives

State the objectives in a succinct (preferably bullet point) manner. Be clear about dependencies and lay the document out accordingly.

* Objective A (*only achieved if Objective B is met*)
  + Objective B
* Objective C
* Objective D
* Etc.

## High-Level Requirements

List the requirements that must be satisfied in order for the project’s goals to be realised.

|  |  |
| --- | --- |
| Requirement | Comments |
| Requirement A | Delivery of A enables B to happen |
| Etc. | Etc. |

## 

## Milestones and Deliverables

List the major project milestones and the deliverables from them

| Milestone | Deliverables |
| --- | --- |
| Milestone A | Deliverable 1 |
|  | Deliverable 2 |
| Milestone B | Deliverable 3 |
|  | Deliverable 4 |
| Etc. | Etc. |

# 

# Project Plan

## Timeline

Lay out the project plan at a very high level in the form of a Gantt chart image. For example:

dd-mon-yyyy dd-mon-yyyy dd-mon-yyyy dd-mon-yyyy

Project initiation Discovery Phase I Complete Phase II Complete etc.

# Financial Estimates

## Estimate

Provide a summary of the estimated costs to deliver the project. If the project is broken into phases then you should cost each phase separately.

# Risks and Assumptions

## Risk Analysis

If you are creating a document as sophisticated as a Project Charter it is likely that there is a separate Risk Register (and possibly presentation slides and spreadsheets). You should reference any relevant business case documentation here for the audience. If not, call out the risks in a table with the column headings below (you should ideally use a spreadsheet):

**Risk Id**– A unique identification number used to identify and track the risk in the risk register. There are different possible ways of classifying the Id but what is clear is that it is best if this is codified. For example, Risk Id RF### could relate to a Financial risk, which Risk Id RC### could relate to a Compliance risk.

**Category**–Is the risk financial (cost and/or revenue), regulatory or compliance, timeline, resource, environment, or some other key category? Categorising risks groups them and aligns them with stakeholders who are best placed to assess/mitigate and stakeholders for whom the risk is greatest.

**Description**– Describe the potential risk. For instance: *Item A cannot be completed until Item B has been purchased but approval has been delayed, or Item A requires resources that have not been identified and the project is currently resource constrained.*

**Potential Impact**– A quantitative rating of the potential impact on the project if the risk should materialize**.**Impact in a Risk Register should be scored on a scale of 1 – 10 with 10 being the highest impact.

**Probability** – The likelihood that the risk will occur at some point in the duration of the project. This should be quantitative like Potential Impact not qualitative (high, medium or low). If you use qualitative measures you cannot calculate a Risk Score, which is done by multiplying Probability and Impact and you can easily convert a number to a descriptor e.g. 1-3 = “Low”, 4-6 = “Medium” and 7-10 = “High”.

**Likely Outcome** – The likely consequence or impact of the risk if it materialises.

**Ranking**– This is the relative ranking of one risk in comparison to all others that have been assessed. This can be qualitative e.g. high, medium, or low, or it can be quantitative, especially if Rank is used as a sorting mechanism to decide what items most require mitigation. Remember that qualitative ranking will produce duplicate values; if you have two “High” ranking items then you should consider how you might decide which is more important?

**Mitigation –**What signs or outcomes indicate the need to implement contingency plans and what are those contingency plans. It is likely that you will need to create a separate Contingency Planning document for each high impact risk.

**Prevention Plan**– An action plan to prevent a given risk from occurring, often combined with the Contingency Plan described above. You should try to establish a prevention plan for every risk that you categorize, starting with those risks that have the greatest potential impact.

**RACI Matrix –** For every risk, try to establish a RACI matrix.

Who is **R**esponsible?

Who is **A**ccountable?

Who should be **C**onsulted?

Who should be **I**nformed?

## Assumptions

List all of the assumptions that are being made. For example: “*to successfully meet its goals in a timely manner with benefits reflected in the current financial year, all parties have signed-off the budget and the project will begin on the scheduled start date.”*

# Project Organization

Describe the key roles in the project, who fills them, and the responsibilities of each role.

| **Name** | **Project Role** | **Project Responsibilities** |
| --- | --- | --- |
| Name | Executive Sponsor | Acts as a champion for the project within the business. Removes blockers and sits in the escalation chain directly above the project manager to ensure all issues are resolved in a timely manner. Recipient of the bi-weekly status report. Etc. |
| Name | Project Manager | PM Responsibilities |
| Name | Technical Lead | Tech Lead Responsibilities |
| Etc. | Etc. | Etc. |

## 

*[You may wish to include an Org Chart here]*

## Project Advisory Board/Steering Committee

List the members of the advisory board/steering committee and state the comms they will receive to keep them abreast of the project, as well as the frequency, location and method of their meetings. For example “*the committee will meet in person at HQ on the first Monday of every month to review the output of the status reports and assess progress*”.

## Project Stakeholders

List the internal and external stakeholders of the project as well as the comms they will receive such as a weekly/monthly status report, timesheets etc.

Be sure to call out all stakeholders. For example Finance may need to produce monthly project costing but may not be directly involved in the project. This is the section where they (and their role/responsibilities) get included in the project.Project Approval

This project has been reviewed and the Project Charter accepted by the following people, as indicated by signature below:

List all individuals whose signature is required, along with their titles and/or roles on the project.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

# APPENDIX A - REFERENCES

List any documents referenced in this Project Charter

|  |  |  |
| --- | --- | --- |
| **Document** | **Description** | **Location** |
| Document name and version | A brief description of the document | Physical location of the document e.g. a folder on a Network drive, doc repository, or hyperlink. |

# APPENDIX B - GLOSSARY

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Term used in the document | Its definition in lay terms |