<Your Logo>

ABC SUPERMARKET EXPANSION

PROJECT CHARTER

<mm/dd/yyyy>

<Your Logo>

VERSION HISTORY

[Provide information on how the development and distribution of the Project Charter up to the final point of approval was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	*<Author name>*	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	*<reason>*

UP Template Version: 11/30/06

[Insert appropriate disclaimer(s)]

Note to the Author

[This document is a template of a Project Charter document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template for your project document, it is recommended that you follow these steps:

1. *Replace all text enclosed in angle brackets (i.e., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):*

   a. *Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.*

   b. *Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.*

   c. *After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.*

2. *Modify boilerplate text as appropriate to the specific project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
4. *To update the Table of Contents, right-click and select "Update field" and choose the option- "Update entire table"*
5. *Before submission of the first draft of this document, delete this "Notes to the Author" page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*
6. *Upon completion of a project that has utilized lite templates the project manager has a responsibility to circle back and improve project documentation for the purpose of providing a complete historical archive of project activities.*

TABLE OF CONTENTS

1 INTRODUCTION

1.1 PURPOSE OF LITE PROJECT CHARTER

[Provide the purpose of the LITE Project Charter.]

The *<Project Name>* LITE Project Charter documents and tracks the necessary information required by decision maker(s) to approve the project for funding.

The intended audience of the *<Project Name>* LITE Project Charter is the project sponsor and senior leadership.

2 PROJECT AND PRODUCT OVERVIEW

[Provide a brief description of the project and its associated product. Also briefly state the business need for the project, its public health/business impact, and how the project goals align with the goals of the NC, Division, and/or Branch. This overview should be approximately one hundred to three hundred words long. It should provide enough information that an executive reading only this portion of the Project Charter would have a working understanding of the project.]

Typically, the description should answer who, what, when and where, in a concise manner. It should also state the estimated project duration (e.g., 18 months) and the estimated project budget (e.g., $1.5M).

3 SCOPE

3.1 OBJECTIVES

[Identify what the project is intended to achieve, in business and technical terms. Describe the expected results of the project, accomplishments, outcomes or products. Examples may include improving epidemiologic analyses by provisioning consistent data or to making progress towards a 2010 goal]

The objectives of the *<Project Name>* are as follows:

- *[Insert Objective 1]*
- *[Insert Objective 2]*
- *[Add additional bullets as necessary]*

3.2 HIGH-LEVEL REQUIREMENTS

[Describe the functions that must be in place when the project is complete. These should be high-level requirements and do not constitute the detailed requirements that are captured in the Planning Phase of the project. Upon approval of the Project Charter, these requirements will be refined in the Planning Phase of the project and will serve as an input to the scope statement in the Project Management Plan.]

The following table presents the requirements that the project's product, service or result must meet in order for the project objectives to be satisfied.

Req. #	Requirement Description

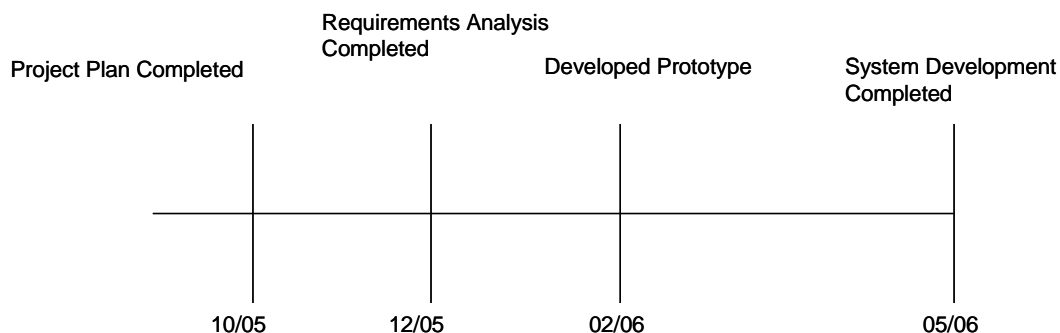## 3.3 MAJOR DELIVERABLES/MILESTONES

[Provide a list of the major deliverables/milestones that will be completed by the end of this project. A deliverable is any unique and verifiable product, result or capability to perform a service that must be produced in order to complete a process, phase or project. A milestone is a key performance indicator that is typically reported to executives to indicate the project's progress.]

Major Deliverable	Deliverable Description

4 DURATION

4.1 TIMELINE

[Provide an estimate of the project duration (e.g., 18 months). You may provide a high-level timeline for the project if information is available at this time. This time estimate will be further refined in the Planning Phase of the project. If applicable, also state the expected life of the product. An example of a high-level timeline is provided below.]

Project Plan Completed   Requirements Analysis Completed   Developed Prototype   System Development Completed

10/05   12/05   02/06   05/06

5 BUDGET ESTIMATE

5.1 FUNDING SOURCE

[State the source of funding for the project (e.g., grant, terrorism budget, or operational budget).]

5.2   ESTIMATE

[Provide the estimated budget for the project. You may also indicate the degree of accuracy of your project's budget.]

This section provides a summary of estimated spending to meet the objectives of the *<Project Name>* project as described in this Project Charter. This summary of spending is preliminary, and should reflect costs for the entire investment lifecycle. It is intended to present probable funding requirements and to assist in obtaining budgeting support.

6 PROJECT CHARTER APPROVAL

The undersigned acknowledge they have reviewed the **LITE Project Charter** and authorize and fund the *<Project Name>* project. Changes to this **LITE Project Charter** will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Steward, Project Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

APPENDIX A: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name and Version	Description	Location
<Document Name and Version Number>	*[Provide description of the document]*	*<URL or Network path where document is located>*

APPENDIX B: KEY TERMS

[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.

http://www2.cdc.gov/cdcup/library/other/help.htm

The following table provides definitions for terms relevant to this document.

Term	Definition
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*