Project Charter – Table of Contents

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Discussion Notes:

Purpose of Charter document:

The purpose of the Charter is to obtain formal approval on the general parameters and structure of the proposed project, including:

* the project objectives and outcomes, benefits, scope and risks;
* the project deliverables, schedule, milestones, and estimated costs; and
* the project organization, governance structure and stakeholders.

1.0 Introduction

1.1 The Executive Summary:

For this assignment, the executive summary will:

* be included in the Introduction section as shown in the required table of contents.
* No longer than ½ page in length

Purpose:

The Executive Summary is an overview of the project used by the CEO to obtain a summary of the project. The Executive Summary should:

* *Provide a brief summary of the project in business terms*
* *Summarize the most important aspects of the project by answering the questions:*
  + *How and why the project was initiated?*
  + *Who will use the final deliverable of the project?*
  + *Who will be impacted by the project?*
* *The following elements are usually covered in the Executive Summary:*
  + *project goals and objectives;*
  + *major milestones;*
  + *key deliverables;*
  + *key risks; and,*
  + *estimated total costs*

1.2 List of Stakeholders:

*This section contains the names of the key stakeholders, who support the project and who agree with their role and the description of the project as it appears in the Project Charter.*

2.0 Project Overview:

2.1 Project Summary:

* *This section briefly summarizes the entire Project Charter, highlighting the significant points of interest to the reader. It includes all of the information required for approval by the key stakeholders.*
* *The summary should also include some background information on the project that includes the reason/s for creating the project (e.g. a business need, a legal requirement, etc.), and mention the key stakeholders who will benefit from the project results.*

2.2 Project Goals, Objectives & Business Outcomes:

*This section describes the project goals and links each of them to related measurable project objectives. In addition, business outcomes to be derived from the project goals and objectives should be presented as outlined in the business case. Measurement criteria, which will be used to confirm that an objective and the outcome have been reached, must also be provided.*

*Keep in mind that goals are high-level statements, usually broad general intentions that are typically intangible or abstract.  Project objectives are concrete and measurement criteria usually confirm if an objective has been met.  Business Outcomes are results expected at the end of the project. Outcomes can be expressed in just a few words that describe a general aim.*

Note: you may use a table with the headings suggested below. Add rows as necessary.

| **No.** | **Goals** | **Objectives** | **Business Outcomes** |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

**2.3 Project Scope:**

**2.3.1 Scope Definition:**

*This is a high-level description of the features and functions that characterize the product, service, or result to be delivered by the project.*

**2.3.2 Boundaries:**

*This is where you expand on the scope definition and outline the major activities required to successfully complete the project (e.g. Develop module ABC, Develop Requirements Document, Prepare presentation xyz, etc.). Make sure to include activities under "Out of Scope" to reduce ambiguity.*

*Add rows as required.*

*While the table provides a summary view of the project boundaries, further explanations should be provided in a narrative form.*

Note: A table may serve you best here. One suggested table format is listed below.

| **Activities In Scope** | **Activities Out of Scope** |
| --- | --- |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |

*Insert additional explanations for project boundaries here.*

2.4 Project Milestones:

*Identify the significant points or events in the project (phases, stages, decision gates, approval of a deliverable, etc.).  This can also represent a high-level project schedule. A table may be used here also.*

| **Project Milestone** | **Description** | **Expected Date** |
| --- | --- | --- |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |

2.5 Deliverables:

* *Identify and define the key deliverables the project must deliver in order to achieve the stated objectives.*
* *Also include internal project deliverables required in the Project Management Process for review and approval (e.g. project transition plan, communication plan, lessons learned etc.).*
* *Determine the criteria that will be used to assess the quality and completion of each deliverable.*
* *Indicate the stakeholder(s) responsible for approving each deliverable.*
* *Add rows as required.*
* *A format for consideration is shown as follows:*

| **Project Deliverable 1: [Deliverable Name]** | |
| --- | --- |
|  | |
| **Description:** |  |
| **Acceptance Criteria:** |  |
| **Due Date:** |  |
|  |  |
| **Project Deliverable 2: [Deliverable Name]** | |
|  | |
| **Description:** |  |
| **Acceptance Criteria:** |  |
| **Due Date:** |  |

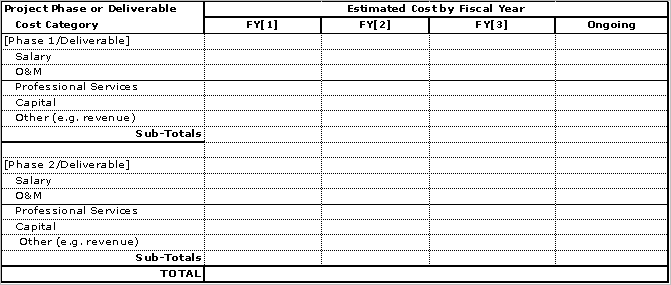
*The deliverables section can be used to build the top levels of a project's Work Breakdown Structure, which divides the big deliverables for a project into smaller, more manageable parts.*

**2.6 Project Cost Estimate and Source of Funding:**

**2.6.1 Project Cost Estimate:**

*This is where you record a summary of cost estimates for all of the resources (human, material and financial) required to produce the deliverables and meet the objectives established for the project. For input and to make sure the full project scope is covered, refer to the items listed in the initial deliverables section (Work Breakdown Structure) and initial project effort estimates. Don't forget to include one-time as well as on-going costs. For example, the estimated cost to sustain the product(s)/service(s) of the project should be provided. Modify the table as required.*

*The business case for the project should contain cost estimates that can be used as the basis for this summary.*

**Figure 1: Project Cost Estimate**Figure 1 - Text version

The diagram is of a sample template for estimating project expenses by phase and fiscal year. The template includes a column for project phase or deliverable and columns for the project's fiscal years.

Under each project phase or deliverable are itemized estimated expenses including salary, O&M, Professional Services, Capital and Other (e.g.) revenue for which projected costs can be inputted into each fiscal year.

**2.6.2 Source of Funding:**

*State the various sources of funding that will be used to support the project. It should be clear to the project sponsor and the project manager where the funds come from and the level of resources committed to this project.*

**2.7 Project Risks, Assumptions, & Constraints**

**2.7.1 Project Risks:**

*This initial risk assessment does not replace the full risk assessment conducted during the planning phase and documented within the project plan – both activities that come after the Project Charter is established.*

*This is where risks are identified at the start of a project.  Decide how important they are and indicate the plan to mitigate the risks.*

* *Identify and describe the key strategic risks involved in the project. You may use a table similar to the table below.*
* *For each risk, also list both the level of impact and the degree of probability (high, medium, low).  This tells the reader how important each risk is.*
* *Identify the possible mitigation actions needed during the project to lessen the impact or lower the probability of the risk involved, and assign the person or team responsible for resolution.*

| **No.** | **Risk Description** | **Probability (H/M/L)** | **Impact (H/M/L)** | **Planned Mitigation** |
| --- | --- | --- | --- | --- |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |

**2.7.2 Project Assumptions:**

*State all factors that are, for planning purposes, considered to be true, real or certain but without including proof. These assumptions will be validated during the planning process. If any are inaccurate, inconsistent, or incomplete, they will result in project risks. Add rows as required.*

You may use a table similar to the following table that lists the items that cannot be proven or demonstrated when this Project Charter was prepared, but they are taken into account to stabilize the project approach or planning.

| **No.** | **It is assumed that:** |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |

**2.7.3 Project Constraints:**

*Identify the specific constraints or restrictions that limit or place conditions on the project, especially those associated with the project scope (e.g. a hard deadline, a predetermined budget, a set milestone, contract provisions, privacy or security considerations, etc.). It will help to categorize the constraints if there are several. Add rows as required.*

You may use a table similar to the following table that lists the conditional factors within which the project must operate or fit.

| **No.** | **Category** | **Constraints** |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |