**Logo**

[Project Name]

Project Charter

By: [Author’s Name]

Version: [Version Number]

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# PROJECT CHARTER PURPOSE

[**Replace the following text with your own statement of the Project Charter Purpose, or use the provided sample text.**]

The project charter defines the scope, objectives, and overall approach for the work to be completed. It is a critical element for initiating, planning, executing, controlling, and assessing the project. It should be the single point of reference on the project for project goals and objectives, scope, organization, estimates, work plan, and budget. In addition, it serves as a contract between the Project Team and the Project Sponsors, stating what will be delivered according to the budget, time constraints, risks, resources, and standards agreed upon for the project.



# PROJECT EXECUTIVE SUMMARY

[Replace this text with a high-level view of:

* project goals
* objectives
* scope
* assumptions
* risks
* costs
* timeline
* approach
* organization]



# PROJECT OVERVIEW

[Replace this text with the rationale and business justification for undertaking this project.]



# PROJECT SCOPE

## Goals and Objectives

|  |  |
| --- | --- |
| **Goals** | **Objectives** |
| [Replace this text with Project Goals. For example: The project will provide an improved system for managing product returns.] | [Replace this text with Objectives for each Goal. For example:   1. Develop a system by June that tracks an end-to-end process for 100% of product returns. 2. Integrate new system with Sales in order to improve customer satisfaction 40% by year end.] |

## Project Deliverables

|  |  |
| --- | --- |
| **Milestone** | **Deliverable** |
| 1. [Milestone Description] | * [Deliverable 1—description] * [Deliverable 2—description] * [Deliverable *n*—description] |
| 1. [Milestone Description] | * [Deliverable 1—description] * [Deliverable 2—description] * [Deliverable *n—*description] |
|  |  |

## Deliverables Out of Scope

[Replace this text with a description of key logical areas not considered part of the boundaries of this project. Examples of these Out-of-Scope Deliverables may include data, processes, applications, or business management*.*]

## Project Estimated Costs & Duration

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Milestone** | **Date Estimate** | **Deliverable(s) Included** | **Confidence Level** |
| [Milestone 1] | [mm/dd/yy] | [Deliverable 1]  [Deliverable 2] | [High/Medium/Low] |
| [Milestone 2] | [mm/dd/yy] | [Deliverable 1]  [Deliverable 2] | [High/Medium/Low] |
|  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Project Expense** | **Comments** | **Est. Amount** |
|  |  |  |
|  |  |  |
| **TOTAL** | |  |



# PROJECT CONDITIONS

## Project Assumptions

[Example: The system is being developed to capture data from public health partners. One assumption is that data is entered electronically into the system.]

This section identifies the statements believed to be true and from which a conclusion was drawn to define this project charter.

* [Assumption 1]
* [Assumption 2]
* [Assumption 3]

## Project Issues

**Priority Criteria**

1 − High-priority/critical-path issue; requires immediate follow-up and resolution.

2 − Medium-priority issue; requires follow-up before completion of next project milestone.

3 − Low-priority issue; to be resolved prior to project completion.

4 − Closed issue.

| **#** | **Date** | **Priority** | **Owner** | **Description** | **Status & Resolution** |
| --- | --- | --- | --- | --- | --- |
| 1 | [mm/dd/yy] |  |  | [Issue 1 description] | [Replace this text with Status and Proposed or Actual Resolution.] |
| 2 | [mm/dd/yy] |  |  | [Issue 2 description] | [Replace this text with Status and Proposed or Actual Resolution.] |

## Project Risks

[Example: The risk of accessibility or unavailability of public health partners for obtaining requirements to develop a data collection system may delay project deliverables. A possible mitigation strategy might be to schedule requirement sessions with the partners as early as possible. List the risks that the project sponsor should be aware of before making a decision on funding the project, including risks of not funding the project.]

| **#** | **Risk Area** | **Likelihood** | **Risk Owner** | **Project Impact-Mitigation Plan** |
| --- | --- | --- | --- | --- |
| 1 | [Project Risk] | [High/Medium/Low] |  | [Replace this text with a description of the Mitigation Plan.] |
| 2 | [Project Risk] | [High/Medium/Low] |  | [Replace this text with a description of the Mitigation Plan.] |

## Project Constraints

[Example: There might be time constraints on developing a system that is used to track data of highly infectious diseases like SARS.]

This section identifies any limitation that must be taken into consideration prior to the initiation of the project.

* [Replace this text with a description of a Constraint.]
* [Constraint 2]
* [Constraint 3]



# PROJECT STRUCTURE APPROACH

[Replace this text with a description of how the project will be structured and what approach will be used to manage the project.

* What are the dependencies of the project?
* How will you Plan and Manage the project?]



# PROJECT TEAM ORGANIZATION PLANS

|  |  |  |
| --- | --- | --- |
| **Project Team Role** | **Project Team Member(s)** | **Responsibilities** |
| [Role Title] | [Name(s)] | [Replace this text with a description of the Role Responsibilities.] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |



# STAKEHOLDERS (INTERNAL AND EXTERNAL)

[Examples of stakeholders include an epidemiologist performing a behavioral research project and people in the field collecting data using a software application (the proposed project) to collect the data required for a behavioral research project.]



# PROJECT REFERENCES

|  |  |
| --- | --- |
| **Milestone** | **Deliverable** |
| [Name of Document/Reference] | [Description with available hyperlinks] |
|  |  |



# APPROVALS

**Prepared by** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager

**Approved by** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Sponsor

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client Sponsor

