

Project charters: Elements and formats

A **project charter** clearly defines the project and outlines the necessary details for the project to reach its goals.

The charter is the formal way that the project's goals, values, benefits, and details are captured.

As with any of your project documents, it is a good idea to collaborate with your team and stakeholders early and often. Developing the project charter in collaboration with both groups can help you make sure that your project charter addresses your key stakeholders' most important concerns and keeps your team aligned. Be sure to use the business case—the reason for initiating the project—as the guiding direction to your project charter.. Project charters will vary but usually include some combination of the following key information:

- introduction/project summary
- goals/objectives
- business case/benefits and costs
- project team
- scope
- success criteria
- major requirements or key deliverables
- budget
- schedule/timeline or milestones
- constraints and assumptions
- risks
- OKRs
- approvals

For more complex projects, you may link to additional analysis or documents. You can house these items in the appendix.

Review and revisit it often to ensure you are aligned.

PROJECT CHARTER TEMPLATE

PURPOSE OF THE DOCUMENT:

The Project Charter will serve as an ***internal*** document that captures high level planning information (scope, deliverables, assumptions, etc.) about the Project.

The Project Manager creates the Project Charter in the Initiation Phase of the Project, in consultation with the Business Manager. Its purpose is to recognize the existence of the project and to begin the planning process required to accomplish the Project goals. It is not intended to be shared with the customer as a formal contract or legal document.

The Project Charter is an input to the Definition Phase of the Project where much of the information contained herein forms the basis for detailed project planning.

PROJECT CHARTER

Project Name:	Project Number:
Date:	Revision Number:

1. PROJECT GOALS

Describe the business need, opportunity or problem that the project was undertaken to address – i.e., the project justification.

2. DELIVERABLES

Provide a high level list of “what” needs to be done in order to reach the goals of the project. Each deliverable should be sufficiently detailed so that the Project Team will understand what needs to be accomplished. Describe the deliverable using action words (verbs) such as “deliver, provide, create, research, etc.

Deliverables should be measurable, so the Project Sponsor and Team can determine whether the deliverable has been successfully completed at the project’s conclusion.

3. SCOPE DEFINITION

Document the scope of work to be delivered. To assist you in defining scope, use documentation such as RFP', sales proposals, business requirements, functional specifications, etc. to set and limit the scope.

In Scope is what the project will include to meet the requirements of the Project goals.

Out of Scope excludes responsibilities, activities, deliverables or other areas that are not part of the Project.

The project will include:

The project will not include:

4. PROJECT MILESTONES

Identify the significant project milestones, including invoicing dates to the client.

5. ASSUMPTIONS, CONSTRAINTS & DEPENDENCIES

Identify the assumptions that were made to form the basis of defining scope. Also identify any assumptions that will be made for the purposes of planning the project. The objective here is to set the boundaries and address how the triple project management constraint (scope, time and cost) are potentially impacted/managed.

List any constraints (potential factors that will impact the delivery or make it difficult to manage the project) on the project or dependencies on resources or funding to the project. Consider time, cost, dates and regulatory issues as constraints or dependencies to the project.

6. RELATED DOCUMENTS

Reference any related documents that were used to define scope and assumptions – e.g., RFQ, RFP, Sales Proposal, etc.

7. PROJECT ORGANIZATIONAL STRUCTURE

Identify the key stakeholders and team members by function, name and role.

Function	Name	Role

8. PROJECT AUTHORIZATION

Approved by:	Business Manager	Date
Approved by:	Project Manager	Date