*<Project Name>*

project charter

Version *<1.0>*

*<mm/dd/yyyy>*

***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):
   1. Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.
   2. Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.
   3. 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.]

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# Introduction

## Purpose of Project Charter

[Provide the purpose of the project charter.]

The *<Project Name>* project charter documents and tracks the necessary information required by decision maker(s) to approve the project for funding. The project charter should include the needs, scope, justification, and resource commitment as well as the project’s sponsor(s) decision to proceed or not to proceed with the project. It is created during the Initiating Phase of the project.

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

# project Overview

[Think of this as an executive summary.]

[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).

# Scope

## Objectives

[What will success look like for the PROJECT?]

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

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

## High-Level Requirements

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. # | I Requirement Description |
| --- | --- |
|  |  |
|  |  |

## Major Deliverables

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

| Major Deliverable | I Deliverable Description |
| --- | --- |
|  |  |
|  |  |

## critical Milestones

[Example: For CPIC major/tactical projects, these milestones could be used to complete the Funding Plan/Cost and Schedule section of the OMB Exhibit 300.]

The table below lists the high-level Critical Milestones of the project and their estimated completion timeframe.

| **Critical Milestones** | **Estimated Completion Timeframe** |
| --- | --- |
| [Insert milestone information (e.g., Project planned and authorized to proceed)] | [Insert completion timeframe (e.g., Two weeks after project concept is approved)] |
| [Insert milestone information (e.g., Version 1 completed)] | [Insert completion timeframe (e.g., Twenty-five weeks after requirements analysis is completed)] |
| [Add additional rows as necessary] |  |

# budget Estimate

## Funding Source

[Example: grant, terrorism budget, or operational budget.]

## Estimate

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.  
*[For CPIC major/tactical projects complete and attach the required sections of the* [*OMB Exhibit 300*](http://intranet.cdc.gov/cpic/) *located at* [*http://intranet.cdc.gov/cpic/*](http://intranet.cdc.gov/cpic/)*. For all other projects, provide a summary of the project’s expected spending* *below.]*



# Assumptions, Constraints And Risks

## 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.

1. [Insert description of the first assumption.]
2. *[Insert description of the second assumption.]*

## 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.

1. *[Insert description of the first constraint.]*
2. *[Insert description of the second constraint.]*

## 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** | **Mitigation** |
| --- | --- |
|  |  |
|  |  |

# project Charter approval

The undersigned acknowledges that they have reviewed the project charter and authorize the funding of the *<Project Name>* project. Changes to this 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: |  |  |  |

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