# Project Charter: [Name of Project]

[Date and Version]

[The Project Charter occurs at project initiation. It authorizes a project to begin and the project manager to lead it. It is made with input from the impending project team and, once finalized and approved, the original document is not changed (it can be amended). To use this template, fill out each section; remove text bound by brackets, and replace it with information relevant to the project (or delete if not relevant). Most sections will be relevant and should be filled out at a high level since details are often not known or needed in the charter when a project is first initiated (project details should then be in separate documents comprising a project plan). Sections can be completed using formatting appropriate for the project. Please consider the audience and accessibility when formatting. For example, a table may be a good format fit for a section, but tables are not highly rated for accessibility.]

## Overview and Purpose

[Write a brief overview providing background or a high-level business case summary of why this project is happening and what problem it solves. This should be one to three short paragraphs.]

## Project Leadership

[Provide information about the leadership of the project. Usually there are two main parties: The project sponsor who is usually the initiator or champion of the project, and the project manager who manages the project. The sponsor can make high level decisions, authorize funding and resources, and remove obstacles that the project manager cannot. The project manager’s role involves all of the communication, documentation, collaboration, and execution of the project to make sure it’s accomplished according to the success criteria. There can be additional parties if they fulfill these roles as well. This section is usually text format.]

Project Sponsor: [Name and area]

Project Manager: [Name and area]

## Timeline and Budget

### [List at a very high level, the timeline, phases, or dates of key points. This is less detailed than milestones, and is usually in a bullet point or table format.]

[Provide the total budget, if any or known, along with a summary of funding or contracting information, if known. If not known, nor if no budget, then specify that. This is usually just one or two sentences.]

## Goals & Objectives

[Describe the project goals or objectives. Goals are the more visionary outcomes desired of the project (e.g. what “done” looks like). Objectives are the specific actions and measurable steps to achieve those goals. Objectives should be as SMART as possible (SMART=Specific, Measurable, Attainable, Relevant and Time-bound). This is not a repeat of the purpose nor a description of scope. These are often recorded as bullet points.]

## Scope

### In Scope

[Describe ideas and activities that will take place during this project. In Scope activities should be directly related to the previously stated goals and objectives and detailed and numerous enough to constrain scope creep. This is often recorded as text and bullet points.]

### Out of Scope

[Consider what project growth ideas or activities need to be specified that this project is **not** going to fulfill. Specifying Out of Scope activities helps to avoid scope creep and to ensure that everyone clearly knows what is not going to be included, completed, or accomplished during this specific project; Out of Scope items may take place in a related, future project, but not this project. These items are often recorded as bullet points.]

### Change Control

[Describe how changes to project scope will be handled and documented. There may be a change process that needs to occur including forms and review boards; these may be required of everyone in the project or just some people in the project (e.g. does the sponsor have to observe the same forms and process to change the scope?). This is usually in the form of text, numbered list, or table.]

## Milestones and Deliverables

[Include milestones and the deliverables (along with acceptance or quality criteria for the deliverables) that will have occurred to achieve the milestones. Milestones are key moments of accomplishment along the project journey, while deliverables are items produced by project activity which have an accompanying set of acceptance or quality criteria. Often, milestones are achieved after a set of deliverables have been completed and accepted. Keep in mind what’s in scope for the project when describing milestones and deliverables. The project charter can contain a higher level of key items while more detailed items can be listed in a full Project Plan. This is often in a table format and, if known, dates or time frames are included as well. Milestones and deliverables can be presented separately or combined, depending upon the project.]

## Stakeholders and Communication

[Describe the key parties involved in the project. Include the sponsor, the core project team, subject matter experts, contractors/vendors, and others affected by the project even if not directly involved. Describe names, titles, affiliation, contact information, and roles/responsibilities, if possible. If specific stakeholders are not known, then a generic name describing a stakeholder group (e.g. accountants) can be used. If there are many stakeholders, a Stakeholder Register is created as a separate document that contains detail beyond the core project team; if you know the detail, and if it’s brief, it can be included here. This section is often in a bullet point or table format.]

[Include a brief overview of planned communication with stakeholders such as meetings (e.g. how often the project team will meet), along with when these will occur. This can be high level or detailed, it depends upon the project. In some cases, a separate, detailed communication plan should be created. This section is often either in a table format or as sentences, depending upon detail.]

## Success Criteria

[List the criteria that demonstrate this project has been completed and that it has been deemed successful. These should be SMART, if possible, and will relate to the project goals, objectives, scope, milestones, deliverables, and people involved. This is often in a bulleted or checklist format. After these criteria are met, the project can be considered successfully completed. While it may be tempting to include non-project indicators of project success (e.g. a 5% increase in productivity after six months), those are operational in nature, and can only be measured after the project has closed, so they should not be included in the charter in any way other than as part of the overview or background.]

## Assumptions

[List project assumptions here. Assumptions are usually related to the culture, landscape, or environment in which the project takes place. They are conditions in which the project will operate and are neither positive nor negative; rather, they are the way things are. Assumptions can be related to risks, be aspirational, or be out of direct control of the project leadership (e.g. weather conditions, IT system reliability, collaborative culture, executive leadership support, municipal and state permitting agency timeliness, availability of staff or subject matter experts, etc.). Assumptions are often in bulleted list format.]

## Risks

[List risks to project completion here and how they will be handled. Risks are project obstacles or issues that will vary in impact and likelihood. These can be high level, as more detailed risks can be included in a separate Risk Management Plan document. Risks are best defined in a group meeting. This can be in a bulleted list format, but is often in a table format with columns for potential risk(text), risk likelihood (use a scale you define such as 1-5, low-high, etc.), risk impact (use a scale), and risk response (text).]

## Constraints and Other Considerations

[List out any constraints beyond the basic timeline and budget listed earlier. This can include calling out specific deliverables or phases that have to be completed by a certain time, restrictions on staff availability, potential socio-economic concerns, limits based upon the physical or cultural environment in which the project is occurring, discussion of anything previously mentioned, or discussion of anything not mentioned in any of the previous areas of the project charter.]

## Approval Sign-off

[Insert the names of the project manager, project sponsor, and any other key stakeholder who should review and approve the charter so that project work can begin. If in a Google doc, the “Approvals” feature can also be used to lock the document to changes after approval and authenticate the approver/s.]

**I have reviewed and approved this project charter. Project work is authorized to begin.**

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[Project Manager Name], Project Manager Sign-off Date

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[Project Sponsor Name], Project Sponsor Sign-off Date