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Project Charter Template
Rev. 2.4, November, 2011

PROJECT CHARTER





Sample - for Evaluation Only

[**Note:** All fields in blue text or marked by an asterisk (*) must be filled in.]

Mouse over this symbol  to obtain on-line help.

1. Does my project require a Charter? <Note: criteria needed in this comment> 
2. Obtain the latest version of this Charter Template from the <document source> <Instructions required in this comment> 
3. Save the Charter file using filename format: *Project Charter_Project Name.doc*.
4. Enter all dates in 8-digit MM/DD/YYYY format (e.g., 02/15/2012).
5. Type an X in the appropriate checkboxes [].

1. General Project Information

* Project Name:	
* Sponsoring Group / Department: 	
* Name of Project Sponsor: 	
* This project will have impact at the level of:	[<input type="checkbox"/>] Department [<input type="checkbox"/>] Business Unit [<input type="checkbox"/>] Enterprise [<input type="checkbox"/>] Other
* If Other, explain:	
* Project Co-Sponsor(s): 	
* Project Rank: 	

Document History

Version	Date	Author	Reason for Change
1.0			

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**Project Charter
<Name of Project>**

2. Stakeholders

List those individuals with a significant interest in this project. 

Name	Department	Location	Telephone ¹	E-mail

3. Vendor Contacts

If a vendor is involved in development of this Charter, provide appropriate contact information

Name	Company	Project Role	Telephone ¹	E-mail

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¹ Include area code first (e.g., 919-555-1212).

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4. Project Definition

Provide sufficient information to fully describe the purpose and goals of this project.

* **Project Purpose / Business Justification:** Describe the product or service that this project will produce. Describe the business problem, need or opportunity being addressed. 📖

* **Business Objectives (a.k.a. Business Value):** Business Objectives are the intended business outcomes of the project, i.e. the reason for doing the project. Business Value is realized as project deliverables are used by their intended audience. Therefore, Business Value is measured **after** project completion (i.e. after rollout of deliverables). 📖

* **Project Success Criteria:** Define what must be done in order for this project to be considered a success by its stakeholders. Project Success is measured upon completion of the project. 📖

Flexibility Analysis: State the order of importance: Cost - Time - Scope

Most important:

Second:

Third:

Who will use the deliverables from this project? 📖

Who benefits? How? Does anyone lose? How? 📖

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5. Project Scope

Provide sufficient information to fully define the scope of this project.

* **Project Deliverables:** List all high-level project deliverables required for completion of the project. If available, provide a link to a high-level Work Breakdown Structure (WBS) or paste in the graphic here. 

* **Out of Scope:** State clearly what this project will not include. If there has been disagreement about what is included in the project, list here anything that a stakeholder might think is included but in fact, is not. 

* **Business Requirements:** Business Requirements are the high level features, functions, conditions and capabilities that must be delivered in order for the organization realize the intended Business Value.

Business Requirements should be entered into the Project Charter Business Requirements template. Add that document to the List of Addenda and attach it to this charter. Provide a link to the document here. 

* **Link to Business Requirements document:**

External Dependencies: Will project success depend on coordination of efforts between the project team and one or more other individuals or groups? Has everyone involved agreed to this interactivity? List such dependencies here.

Project Interdependencies: Does this project depend on deliverables from another project? Do any other projects depend on deliverables from this project? List such interdependencies here.

Check if PM Approach to be used in this project:

Waterfall Iterative Agile Other

Check if all PM techniques to be used in this project:

Risk Mgr Formal Baselines Change Control CPM
 Earned Value Transition Mgr Phase Gate Reviews
 Other (describe below)

Describe Other:

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* **Procurement:** Will any procurements be required for this project? If Yes, list them here along with their approximate value.

Description of Procurement	Approximate Cost
	\$
	\$
	\$

6. Project Milestones

List those major milestones that will serve as indicators of project progress. 

ID	Milestone	Completion Criteria
1		
2		
3		
4		

Project Duration: Provide an estimate of project duration (weeks, months or years). Include a measure of uncertainty in one of the following forms: Range of duration (e.g. 11 to 17 months), a likely duration with confidence limits (e.g. 14 months +/- 3 months) or a single figure with confidence level (e.g. 15.5 months at 83% confidence). 

**Estimated Project
Duration:**

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7. Project Risk Assessment


Provide your best understanding of those risks that could cause this project to fail or result in delay or reduction in Business Value.

Risk Rating from preliminary risk assessment (Hi, Med, Lo): 

Link to preliminary risk assessment document:

* **Major Known Risks:** Describe any significant threats to the success of this project, and for each one provide an indication of how the risk can be managed.

Risk Description	Management Action

* **Assumptions:** List anything that you have assumed to be true for planning purposes but which may in fact not be true. 

* **Constraints:** List any conditions that may limit the project team's options with respect to resources, personnel, or schedule. 

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8. Project Selection Data

The following information will be used during the project Selection / Prioritization Process. For more detail, use the **Project Charter Selection Criteria addendum** document and skip this section. If available, provide a link to the document in the space below. 

Link to Project Charter Selection Criteria addendum document:		
* If this project is mandated or is required for continued business operation:	Mandated by whom?	
	Impact of not meeting mandate?	

Strategic Alignment: Indicate which of the following measures of Strategic Alignment the project supports and how it does so.

Financial ROI	<input type="checkbox"/>
Customer	<input type="checkbox"/>
Process/ Internal	<input type="checkbox"/>
Learning	<input type="checkbox"/>

Project Category: Run Grow Optimize Transform

This Project is Urgent: Yes No

If Yes, explain:

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9. Financial / Resources Information

Provide a complete description of the cost and Return on Investment (ROI) of this project.

* **Estimate of Implementation Cost** Use the **Preliminary Project Cost Estimate template** to calculate a preliminary cost estimate for this project. Include this template in the List of Addenda and attach it to this charter. Provide a link to the worksheet in the space below. 📖

Link to Cost Estimate Worksheet:

* **Total Estimated Project Cost:** 📖 \$

Return-on-Investment (ROI) Data (include both Financial and non-Financial ROI estimates)

Financial ROI: 📖 \$

Non-Financial ROI: 📖

Funding Source: Indicate source of funds to be used for project implementation. Add rows as needed.

Name of Organizational Unit

Fund Center

Estimated Amount

Special Resource Requirements (Add rows as needed) 📖

Project Role (e.g. Consultant, subject matter experts)

Hours needed (e.g. x hrs/mon for x months, x hours total)
Include confidence intervals, e.g. 100 hrs +/- 20 hrs

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10. Estimated Total Cost of Ownership (TCO) 5-Year

In the **Calendar/Fiscal Year** column, change years as appropriate.

In the **Capital** and **Operational** columns, click on each entry once to select the full field (0.00) completely before entering the dollar figure. Gray box will disappear when number is typed in.

In the **Totals** row, total the dollar figure in each column by placing the cursor on dollar figure field, clicking once to select it, then clicking the right mouse button and selecting Update Field.

Calendar Year (1, 2, 3) or Fiscal Year (2012-13)	Capital (\$U.S.)	Operational (\$U.S.)
2012-13	0.00	0.00
2013-14	0.00	0.00
2014-15	0.00	0.00
2015-16	0.00	0.00
2016-17	0.00	0.00
Totals	0.00	0.00

11. Sign-off

Project Sponsor and any Co-Sponsors should sign the Project Charter. In addition, key stakeholders should sign as an indication that they agree with the scope, projected cost, etc. Finally, if the Project Manager has been assigned that person should also sign the charter.

	Name	Signature	Date (MM/DD/YYYY)
Project Sponsor:			
Co-Sponsor:			
Project Manager:			

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12. List of Addenda

For each supplemental document used in this Charter, enter an X in the "Included" column. If you have other supplemental documents, add them to the list.

Included [x]	Document Name
	Project Charter Business Requirements
	Cost Estimate Worksheet
	Preliminary Risk Assessment
	Project Selection Criteria
	Work Breakdown Structure document

13. Notes

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