

<PROJECT NAME>

Project Charter

<Date here>
Version 0.0

Prepared for:
<Customer's Name>
<Customer's Organization>

Prepared by:
<Author's Name>
<Author's Organization>

The Project Charter is a formal agreement between the creators and consumers of project deliverables that establishes the purpose, participants and direction for a project. The Project Charter is a living document and should be updated throughout the life of the project as the agreement changes. This document is the basis for change control during the life of the project. This template was created by Tryon and Associates. Additional information is available at www.TryonAssoc.com. You may use this template freely when this notice is retained.

Project Overview

The Project Overview provides a brief summary of the entire Project Charter. It may provide a brief history of the events that led to the project, an explanation of why the project was initiated, a description of project intent and the identity of the original Project Owner.

Place Project Overview text here.

Project Goal and Objectives

Project Goals identify the most significant reasons for performing a project. Goals should describe improvements this project is expected to accomplish along with who benefits from these improvements. This section should explain what various beneficiaries will be able to accomplish due to the project. Project Objectives identify provable or measurable criteria that must be satisfied before the project is considered complete. Project Objectives should support one or more specific Project Goals.

Place Project Goals and Objectives text here.

Impact Statement

The Impact Statement identifies the influence the project may have on the business, operations, schedule, other projects, current technology and existing applications. While these topics are beyond the domain of this project, each of these items should be raised for possible action.

POTENTIAL IMPACT	REASON	IMPLICATIONS

Constraints and Assumptions

Constraints and Assumptions identify any deliberate or implied limitations or restrictions placed on the project along with any current or future environment the project must accommodate. These factors will influence many project decisions and strategies. The potential impact of each constraint or assumptions should be identified here. When the implications of these Constraints and Assumptions threaten the success of a project, their impact should be addressed in the Risk Mitigation Plan component of the Project Plan.

CONSTRAINT/ ASSUMPTION	SIGNIFICANCE	IMPLICATIONS	DATE

Project Scope

Project Scope defines the boundaries for the project. Specific scope components are the areas or functions to be examined by the project (Domain of Study) and the work that will be performed (Domain of Effort). It is also useful to identify visible outcomes or deliverables that result from this project. The Project Scope should identify both what is in scope and what is not in scope.

DOMAIN OF STUDY:

Place text here.

DOMAIN OF EFFORT:

Place text here.

DELIVERABLES/OUTCOMES:

Place text here.

Affected Knowledge Assets

Affected Knowledge Assets identifies all collections of organizational knowledge that will be created, updated, used or deleted by this project. Importance may be vital (V), important (I) or simply convenient (C). Type of use may newly created (C), read (R), updated or changed (U) and achieved or deleted (D).

KNOWLEDGE ASSET	WHY IS THIS ASSET SIGNIFICANT TO THE ORGANIZATION?	IMP.	LOCATION	TYPE OF USE

Financial Summary

The Financial Summary provides a recap of expected costs and benefits due to the project. These factors should be more fully defined in Project Cost/Benefit Worksheets. Project financials must be reforecast during the life of the effort. This information may also be supported in a more detailed Financial Plan.

Place Financial Summary information here.

Project Approach

Project Approach identifies the general strategy for completing the project and explains any methods or processes that will be used during the project. A more detailed Project Strategy and Technical Strategy document may be needed to support this component. This information will be the basis for the Project Plan.

Place Project Approach text here.

Project Organization

The Project Organization identifies the roles and responsibilities needed to create a meaningful and responsive structure that enables the project to be successful. This Project Organization must identify the people who will play each assigned role. At minimum, this section should identify who plays the roles of Project Owner, Project Manager and core Project Team. This information should be further defined in the Staff Plan.

The **Project Owner** for this project is (Project Owner's name here).

ROLE: The Project Owner is the ultimate trustee for this project to the larger organization. When needed, the Project Owner may appoint a **Project Steering Entity** to help make ownership decisions.

RESPONSIBILITIES:

An actively engaged Project Owner plays two distinct roles during a project. They help *initiate* the project by...

- Evaluating the total organizational implications of the project.
- Determining that the project is worth the expenditure of money and time.
- Authorizing the project to begin.
- Communicating project expectations to the Project Manager.
- Certifying the initial Project Charter and Base Project Plan.
- Insuring adequate resources are available to the Project Manager for this project.

The Project Owner *sustains* the project by...

- Championing the project to the total organization.
- Reviewing project status with the Project Manager.
- Insuring critical issues so they may be resolved.
- Ruling on changes to the Project Charter, allocating any additional needed resources.
- Verifying that assigned resources are available to this project.
- Helping the Project Manager resolve resources issues.
- Authorizing the project to continue.

The **Project Manager** for this project is (Project Manager's name here).

ROLE: The Project Manager is the individual responsible for organizing, planning, controlling and leading this project. A Project Manager reports to and has access to the Project Owner. He or she is authorized to act for the Project Owner.

RESPONSIBILITIES: A Project Manager...

- Communicates the Project Goals and Objectives to the Project Team.
- Creates the Project Charter and Project Plan.
- Facilitates project planning activities with the Project Team and other needed participants.
- Communicates issues and changes to the Project Owner.
- Communicates status to the total organization.
- Verifies the quality certification of all project deliverables.
- Updates the Project Charter and Project Plan components when authorized.

The **Project Team** is an interdependent collection of individuals who have been selected to perform the work of the project.

ROLE: The core Project Team may come from many organizational units. They work collaboratively to accomplish the goals and objectives of the project. They report functionally to the Project Manager.

RESPONSIBILITIES: Each member of the Project Team...

- Is skill matched to the project.
- Will work with the Project Manager to define their specific responsibilities on the project.
- Is available to work on the project.
- Will participate in planning activities.
- Will alert the Project Manager of any factors that prevent them from performing their assigned role on the project.
- Will perform their work in a professional manner.
- Will account for the effort, duration and cost of their participation.

Core Project Team members for this project are...

TEAM MEMBER	ORGANIZATION	EMAIL	PHONE

Project Charter Acceptance

When a formal confirmation of Project Charter review and validation is needed, a Project Charter Acceptance section should be included. At minimum, this section must indicate the formal acceptance of the Project Owner and Project Manager. It may also include approvals from any corporately designated funding agents and service provider management who are corporately charged with certifying the project. Procedures for updating this document and obtaining electronic approvals should be identified here.

The signatures affixed below indicate that the undersigned...

- Have read the Project Charter.
- Have formally voiced any concerns to the Project Manager.
- Certify that the Project Charter accurately represents their expectations and conditions required for the project.
- Wish to be notified of any changes that must be made to this Project Charter.
- Are unaware of any undocumented conditions that will prevent the success of this project.

(Project Owner's Name)
Project Owner

Date

(Project Manager's Name)
Project Manager

Date

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