
Project Charter

Client:

Date:

Project Name:

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Version register

Version #	Date	Author	Details

Introduction and background

Insert an introduction to the project and provide background information as needed

Objectives

Insert the business objectives that the project is expected to meet, or the business problem it is intended to solve. And project objectives that can be articulated later in the form of completion criteria

Business objectives:

Project objectives:

Financial and non-financial Benefits and impacts

Insert the information from a business case, or create the benefits and financial impacts of the project to be used to ensure the project completion criteria are aligned with the business needs. The table below lists the contents of a post implementation benefits analysis, if this work is in the scope of the project add it to the scope, if not put it in the out of scope. The measurements will align to the original business case, if there is no business case, the measurements will need to be created with the sponsor and key stakeholders.

What	Who	When	What is the criteria for success

Scope/deliverables

List the specific items in and out of scope. This will inform the planning and scheduling sections of the project plan and will form part of the project completion criteria

In scope

Out of scope

Major deliverables

Deliverable	Description	Estimated completion	Approval requirement

Approach

Project approach

List the approach, phased, big bang delivery, agile, waterfall, etc. If there are decision gates within the schedule articulate the process for achieving go/no go.

Scope change management approach

How will scope change requests be handled, is there an escalating level of decisions, ie can the PM make some decisions about scope change

Decision making approach

Who will make what decisions, within certain criteria will the project team be able to make a decision and inform the PM? Do all decisions need to be made through a sponsor or steering committee?

Issue management approach

How will issues be raised and resolved, are there criteria that will guide the process of issue resolution?

Risk management approach

Will the risks management be assigned to an individual, will periodic separate risk meeting?

Stakeholders

Who are the key stakeholders known at this time? Will there be a separate stakeholder analysis activity at any time within the project?

Stakeholder	What is their stake	Impact on this project

Risks and mitigation

This section deals with the current known risks and informs the risk and issue log. The log is kept up to date and current this table will not be updates after the charter is signed.

Risk	Action

Assumptions, constraints, and interrelations

Assumptions

The fundamental assumptions based on the knowledge of the company, external market, culture, and other factors as know. This section may include assumptions about technology upgrades or changes. The assumptions often inform the constraints and interrelations.

Constraints

This lists the boundaries that have an impact on the project. This often includes items such as legislation, resource availability, and market forces. The key drivers are developed from the triple constraint of project management: time, resources, and scope. The decision, issue, and scope management approaches will be guided by the order of priority of these three constraints. In a legislative project time is generally the key driver. All decisions will be based on meeting a compliance date. The second driver may be risk or level of compliance (scope), or it may be based on the people or money available (resources)

Interrelations

List all the projects, or operational activities, that may have an impact on this project. This will also inform the project communications plan

Project/operational activity	Impact	Contact

Project Completion Criteria

This is the basis of handing over the outcome to an operational team. List only the key milestones, or measurements, or other criteria that will signify the project is ready to closeout. Much of the criteria will come from the scope statement section, or the benefits section.

Project Structure

Governance structure

Place a graphic or bulleted list of the governance structure here. The governance structure may include a steering or oversight committee, separate project teams

Schedule

Place a graphic of the timeline of the project as known at this time. This is often at the phase level in the charter.

Resource requirements

This is a list of people or roles needed to complete the project and will include an estimate of the effort required. The project roles should be the same as those in the resource role table.

Project role	Name	Estimate of effort

Resource roles

This is a list of the types of project roles, sponsor, subject matter expert, coder, business analyst, and the expectations of each. List only the roles as identified in the resource requirements table.

Role	Requirements

Project Communications plan

This is the internal communication plan for the project (status reports, meeting minutes). It may include communications to the larger organization (organizational updates, consolidated project portfolio reporting) but does not include communications that are deliverables of the project (customer communications, training communications).

What	How often	Who to and by	How

Sign off

Signing the charter initiates the planning phase. The signers may include some of the key stakeholders, or the functional managers of key team members.

Sponsor

Project Manager

Other