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Template Guide

What is a Project Charter?

A Project Charter is a high-level, short document created at project initiation to communicate the major parameters of the project the executives have approved to proceed. It summarizes briefly:

- *business drivers and justification*
- *scope, schedule, cost targets*
- *high level resource needs*
- *key roles assigned for the project (sponsor and project manager)*

How do I use a Project Charter?

The Project Charter expresses what the executives have approved for further work in a succinct, understandable form, to guide the new project team and ensure the project kicks off with a clear understanding of goals, assumptions, and constraints.

Project Charter Guidelines:

- *When a new project idea has been vetted by some early investigation and analysis work and selected to proceed, create the Project Charter to document the major parameters of the project as understood by the executives who have approved it.*
- *Use information from the early project proposal, any business case information created during the concept investigation, and any cost and other information gleaned from early feasibility analysis to fill in sections of the Project Charter.*
- *Get official executive sign-off on the Project Charter. Ensure the charter is communicated to functional executives whose people will be needed for the project.*
- *Officially kick off a team to move forward with this project.*
- *Have the team review the Charter together and discuss the goals and constraints and assumptions to ensure that everyone starts the project with a common understanding.*
- *Keep the Charter visible and review it during the Initiation and Planning work of the project, to ensure further project definition work stays true to the original business goals.*
- *Update the Charter if needed during this time to further clarify its content, but be sure to not change the meaning of any of the project's major parameters. The project sponsor must be involved in any material changes to the Project Charter.*

How to use this template

This document provides a guide on the topics usually included in a Project Charter document. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

1 Project Name

[Specify the Official Name for this project. This should be the name used in all project documentation.]

2 Project Overview

[Provide a high-level description of the project, which outlines the intended project outcomes and deliverables. Include information that ties to the organization's strategic initiatives, if applicable.]

3 Preliminary Understanding of Business Case or Need

[Provide a high-level statement of the business need being addressed by this project. Include information regarding pre-determined data needs, whether the Web presence needs to match print collateral, etc. A specific problem or opportunity statement should be included. It can include the financial benefit to the organization of performing the project, to the costs of implementing the project; it may be based on a weight system; or may be based on regulatory requirements.]

4 Project Goals and Objectives

[Provide high-level descriptions of the project goals and project objectives in the table below:]

Goals	Objectives
[Replace this text with Project Goals. For example: The project will provide an improved system for managing product returns.]	[Replace this text with Objectives for each Goal. For example: Develop a system by June that tracks an end-to-end process for 100% of product returns. Integrate new system with Sales in order to improve customer satisfaction 40% by year end.]
[Add Item].....	[Add Item].....
[Add Item].....	[Add Item].....

5 Preliminary Statement of Work

[Provide a high-level statement of what will be delivered as a result of this project. It should be understood by all that this may change as a result of analysis. An example of a preliminary statement of work is: *“The Admissions Application project will deliver Web-enabled functionality to allow prospective, non-transfer students to apply for admission to the undergraduate program at American University. The information will reside in PeopleSoft.”*]