Project Charter Template

ProjectManager

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	Information
Document Id	*[Document Management System #]*
Document Owner	*[Owner Name]*
Issue Date	*[Date]*
Last Saved Date	*[Date]*
File Name	*[Name]*

Document History

Version	Issue Date	Changes
[1.0]	*[Date]*	*[Section, Page(s) and Text Revised]*

Document Approvals

Role	Name	Signature	Date
Project Sponsor			
Project Review Group			
Project Manager			
Quality Manager *(if applicable)*			
Procurement Manager *(if applicable)*			
Communications Manager *(if applicable)*			
Project Office Manager *(if applicable)*			

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1 Executive Summary, Project Purpose, Goals and Success Criteria

1.1 Executive Summary

Sum up each of the sections in this document concisely by outlining the project:

- Definition
- Organisation and plan
- Risks and issues
- Assumptions and constraints.

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1.2 Project Purpose & Vision

Project Purpose
This section describes what the project sets out to achieve from a high-level view. It briefly outlines the problem that it will solve, the key objectives to be met, the scope of work to be undertaken and the deliverables to be produced.

Vision
Describe the overall vision of the project. The vision statement should be short, concise and achievable. Examples of vision statements include:

- To deliver a robust, scalable financial management system to the business
- To procure new work premises with adequate capacity and functional surrounds
- To successfully introduce new customer service processes to the marketplace.

1.3 Project Goals and Objectives

List the key objectives of the project. Objectives are statements which describe in more detail what it is that the project is going to achieve. All objectives listed should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART).

Business Objectives
List the business-specific objectives to be achieved. For example:

- To deliver new accounts payable and receivable and payroll processes, thereby reducing financial processing timescales by at least 30%
- To build brand new work premises with 50% more space, 30 more cark parks and 20% fewer operational costs than the existing premises
- To provide a new customer complaints service to enable customers to issue complaints on-line and receive a direct response from the company within 24hrs.

Technology Objectives
List the technology-specific objectives to be achieved. For example:

- To install new accounts payable and receivable and payroll system modules within the existing accounting system, thereby achieving 99.5% system up-time
- To relocate existing technology infrastructure at the new building premises within 2 days elapsed time and with no impact on customer service delivery
- To build a new website which allows customers to enter and track complaints through to resolution.

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1.4 Project Success Criteria

In this section, you'll want to list the metrics or standards that will measure whether a project is successful. This makes it easy to set clear expectations and offers a framework for evaluating the project's performance. Some common success criteria that are included in a project charter include, time, cost, scope, quality, risk management and stakeholder satisfaction, but feel free to make adjustments based on what you want to track.

2 Project Scope, Quality Management and Timeline

2.1 Project Scope

Define the scope of the project in terms of the business:

- *Project tasks, processes and workflows*
- *Tasks dependencies*
- *Project milestones*
- *Project deliverables*
- *Acceptance criteria for project deliverables*
- *Project exclusions*
- *Project assumptions and constraints*

Where relevant, identify the related business areas which will not be affected as a result of this project.

Scope Baseline			
Task	**Dependencies**	**Deliverables**	**Acceptance Criteria**

Exclusions, Assumptions and Constraints	
Exclusions	
Assumptions	
Constraints	

Milestone	Description	Delivery Date
		xx/yy/zz

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2.2 Quality Management

Next, define quality standards, quality assurance processes and quality control guidelines from a high-level view. This makes sure the various processes are being done to lead to the success of the project. So, therefore, you want to list the process — be it change management, risk management, issue management, etc. — and then describe it.

- **Quality Standards:** These are the criteria and benchmarks that measure the quality of a project's processes and deliverables. They enable the project to meet stakeholder expectations.
- **Quality Assurance Guidelines:** Next are quality assurance guidelines that help define quality standards and establish quality control procedures. These guidelines can help improve customer and stakeholder satisfaction.
- **Quality Control Procedures:** List the specific actions that you'll take to ensure the product, service or process meets the predetermined quality standards.

Task or Deliverable	Quality Standards	Quality Assurance Guidelines	Quality Control Procedures

2.3 Project Timeline

The project timeline section is where there's a high-level overview of the project schedule. This should include key milestones and target completion dates to help set project expectations and a framework for more detailed project planning.

Gantt charts are the most commonly used tool to represent a project timeline. Use the Gantt chart below to make a project timeline.

The image below shows a Gantt chart, which is the perfect project management tool to easily visualize these and other details of the project schedule, such as the critical path of the project.

You may edit the Gantt chart below to represent your project schedule. Learn more about our Gantt chart template for Word here.

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3 Resources, Costs and Budget

Once the project tasks have been defined, it's time to identify what resources will be required, what their cost will be. Additionally, there's a cost-benefit analysis section that allows you to compare the estimated costs of the project against potential benefits to determine its value to the organization.

3.1 Resource Management

In this section, you are going to summarize the duration and effort of each project team member. Begin with their role, followed by the start and end dates and the percentage of effort.

Task	Resource requirements

Now comes the financial part. Here you break down the category to the cost and the value. A more detailed financial plan can be developed in the planning stage of the project.

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3.2 Estimated Costs and Project Budget

This section includes a high-level overview of the needed resources to complete the project. It can help get the right funding and manage stakeholder expectations. The project's estimated cost could include labor, material or overhead costs while the total project budget is a list of all costs. This includes labor, materials, equipment, software, travel and overhead.

Task	Labor Costs	Material Costs	Other Costs	Budget	Actual

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3.3 Cost-Benefit Analysis

A cost-benefit analysis (CBA) in a free project charter template helps justify the project's resource investment and ensure the project aligns with the organization's objectives. It can also help get stakeholder buy-in and mitigate risks. Elements of a cost-benefit analysis include direct costs, benefits (both tangible and intangible) and a risk assessment.

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4 Project Team and Stakeholders

4.1 Project Team

Identify the roles required to undertake the project. Examples of typical project team roles include project:

Project Sponsor
The Project Sponsor is the principal 'owner' of the project. Key responsibilities include:

- Defining the vision and high level objectives for the project
- Approving the requirements, timetable, resources and budget
- Authorising the provision of funds / resources (internal or external)
- Approving the project plan and quality plan
- Ensuring that major business risks are identified and managed
- Approving any major changes in scope
- Receiving Project Review Group minutes and taking action accordingly
- Resolving issues escalated by the Project Manager / Project Review Group
- Ensuring business / operational support arrangements are put in place
- Ensuring the participation of a business resource (if required)
- Providing final acceptance of the solution upon project completion.

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Project Review Group
The Project Review Group may include both business and 3rd party representatives and is put in place to ensure that the project is progressing according to plan.

Key responsibilities include:

- Assisting the Project Sponsor with the definition of the project vision and objectives
- Undertaking Quality Reviews prior to the completion of each project milestone
- Ensuring that all business risks are identified and managed accordingly
- Ensuring conformance to the standards and processes identified in the Quality Plan
- Ensuring that all appropriate client/vendor contractual documentation is in place prior to the initiation of the project.

Project Manager
The Project Manager ensures that the daily activities undertaken on the project are in accordance with the approved project plans. The Project Manager is responsible for ensuring that the project produces the required deliverables on time, within budgeted cost and at the level of quality outlined within the Quality Plan.

Key responsibilities include:

- Documenting the detailed Project Plan and Quality Plan
- Ensuring that all required resources are assigned to the project and clearly tasked
- Managing assigned resources according to the defined scope of the project
- Implementing the following project processes: time / cost / quality / change / risk / issue / procurement / communication / acceptance management
- Monitoring and reporting on project performance (re: schedule, cost, quality and risk)
- Ensuring compliance with the processes and standards outlined in the Quality Plan
- Reporting and escalating project risks and issues
- Managing project interdependencies
- Making adjustments to the detailed plan as necessary to provide a complete picture of the progress of the project at any time.

Project Team Member
A Project Team member undertakes all tasks necessary to design, build and implement the final solution.

Key responsibilities include:

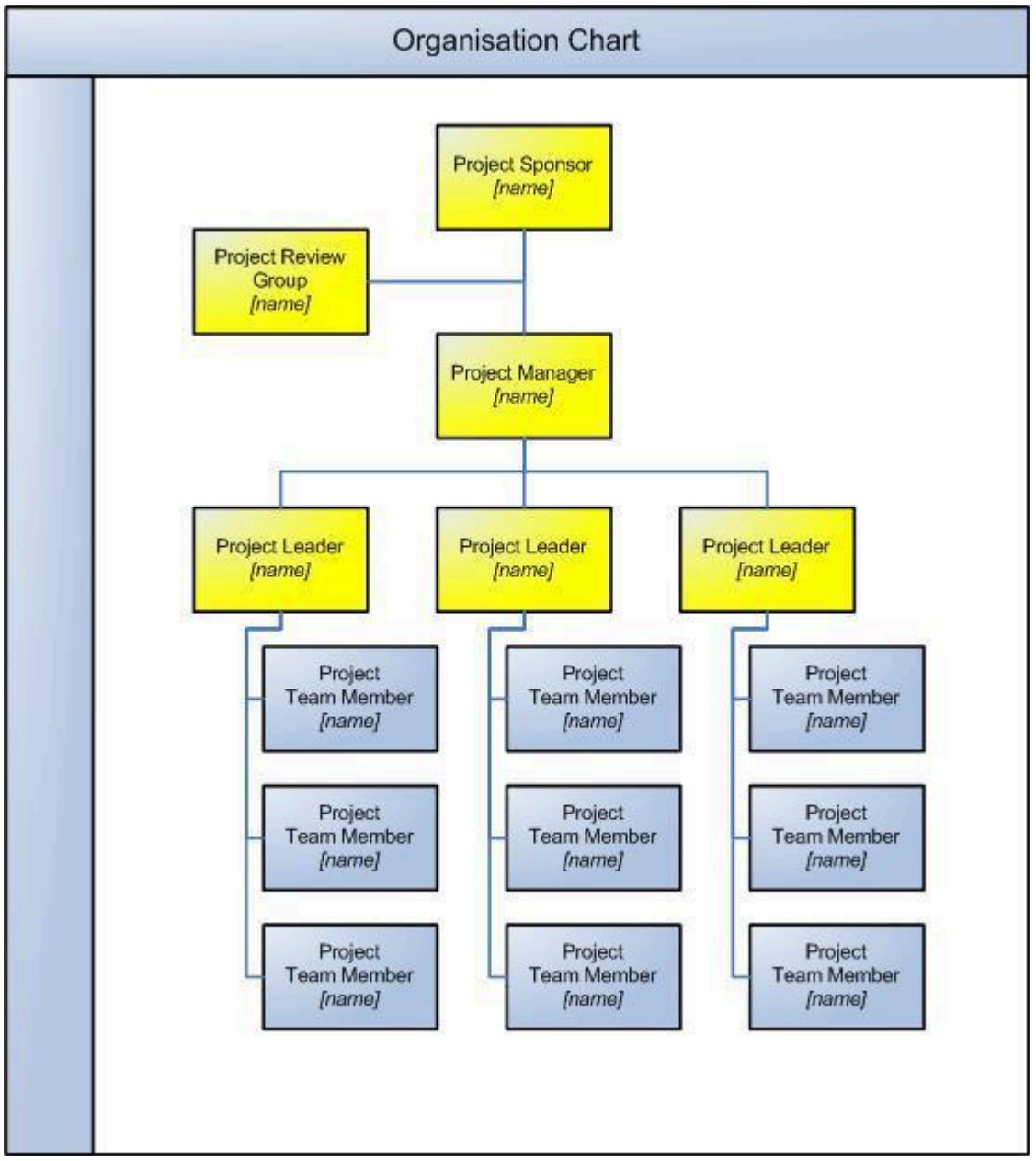
- Undertaking all tasks allocated by the Project Manager (as per the Project Plan)
- Reporting progress of the execution of tasks to the Project Manager on a frequent basis
- Maintaining all documentation relating to the execution of allocated tasks
- Escalating risks and issues to be resolved by the Project Manager.

For each role identified, list the resource likely to fill each role and his/her assignment details by completing the following table:

Role	Organisation	Resource Name	Assignment Status	Assignment Date
Role	*Organisation*	*Person*	*Unassigned / Assigned*	*xx/yy/zz*

Depict the reporting lines between each of the key roles described above within a Project Organisation Chart. An example follows:

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4.2 Project Stakeholders

List the key stakeholders for this project. A 'stakeholder' is simply a person or entity outside of the project who has a key interest in the project. For instance, a company financial controller will have an interest in the cost implications of the project, a CEO will have an interest in whether the project is conducted in accordance with the vision of the company. Examples of stakeholders include:

- **Stakeholder Register:** This document lists all individuals or groups who may have an interest in a project.

Name	Role	Power	Interest	Contact information

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- **Stakeholder Map:** This visually represents the groups or individuals with a vested interest in the project and helps develop a strategy for stakeholder management.



5 Change and Risk Management

Now it's time to identify who will work in the project, what will be the roles and responsibilities of the project team members and who the project stakeholders are.

5.1 Change Management

A project charter should explain how changes will be handled once the project starts. To do so, a change control board must be appointed, and a change request form and change log must be created.

Change Control Board

Name	Role	Responsibilities

Change Order Request Form

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Change Log

Date Identified	Request	Impact	Approval	Date Started	Date Completed
1/2/2024	Add spackle	Schedule	Yes	1/20/2024	1/30/2024

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5.2 Risk Management

Here is where you address the risks in your project. Describe what risk might arise in the project, note the likelihood (high, medium or low), the impact it will have (again: high, medium or low) and the mitigating actions you will take if it does happen.

- **Risk Matrix:** A risk matrix is a visual representation of the potential project risks based on their likelihood and impact. It makes it easy to see what risks are pressing and what risks likely won't come to fruition.

Risk Matrix		Severity				
		Insignificant	Minor	Moderate	Major	Severe
Likelihood	Almost Certain	Medium	High	Very High	Very High	Very High
	Likely	Medium	High	High	Very High	Very High
	Possible	Low	Medium	High	High	Very High
	Unlikely	Low	Low	Medium	Medium	High
	Rare	Low	Low	Low	Low	Medium

- **Risk Log:** Our project charter template has a risk log so you can list the potential risks that could affect your project plan. From there you can develop your risk mitigation strategies and assign risk owners.

Risk	Likelihood	Impact	Response	Risk Level	Risk Owner
1	Supply delay	Schedule	Backup Supplier	High	Daniel Johnson

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- **Risk Mitigation Strategies:** Various techniques can be used to reduce the impact or likelihood of a risk occurring. Some examples include risk reduction, risk avoidance or risk acceptance.
- **Assumptions and Constraints:** List any assumptions you have about the project. Then note the project constraints. Finally, in an appendix, you'll want to attach the supporting documentation, such as the project schedule, business case, feasibility study, project charter, etc.

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