Developing a Project Charter

A project charter outlines the expectations for how a project team, advisory group and other participants will work together. By clarifying the time commitment and decision-making process, teams can avoid misunderstandings and potential conflicts down the road. Discussing a draft charter can help identify questions and clarify expectations among the group early in the project. Once initial edits have been included, a charter can serve as a "living document" and reference for the group that is updated when needed.

This document outlines a set of questions to consider early in the project to clarify roles and responsibilities for a project advisory group. The second section of this document includes a template for an advisory group charter that has been used by several NERRS Science Collaborative projects. The questions and template could be modified for use with a large project team as well.

Even if developing a full charter feels too formal or unnecessary for a particular project, it can still be helpful to walk through a set of basic questions to clarify expectations and identify any lingering questions with your group. For example, you could combine elements of a project overview and group charter into a single reference for your group and make this available as a set of slides or a shared document after your first meeting.

Questions to Consider when Drafting a Project Charter

Project Purpose
- In a sentence or two, what is the core purpose of the project? Everyone is busy, and it is always helpful to reiterate this basic information.

Purpose of the Advisory Group
- What is the core purpose of the advisory group? For example, to provide advice and input throughout a project and help ensure that information and tools produced are relevant and usable to the management community.
- Are there particular products that will require a more intensive level of collaboration with this group? If so, these could be referenced in the charter.

Group Structure, Composition and Roles
- How was the composition of the group determined? For example, the Advisory Group includes representatives from diverse governmental and non-governmental organizations involved in addressing X issue.
- Are there any sub-groups or sub-committees? If so, what is their role?
- Who will facilitate meetings and support group coordination?

- Who is on the project team and advisory group and how can they be reached? A full participant list could be included or referenced in a charter.
- Who will facilitate data sharing, access, and management?

Meetings, Timeline and Time Commitment
- What is the approximate timeline of the project and the advisory group's engagement? Are there any key milestones to be aware of, such as an approximate time when the group will review a key product or report?
- How often will the group meet and for how long? Will meetings be in-person or virtual?
- How should advisors expect to participate in those meetings?
- Will there be a Read or Work Ahead for participants to review before meetings?
- Will there be notes and a summary of action items following each meeting?

Communication
- How will the group communicate and with what frequency? Is email sufficient or will there be enough back and forth communication and file sharing that a platform such as Slack could be useful?
- Do group members prefer one virtual platform over another? Are there any access issues that need to be addressed?
- Where can group members find project references? Will project documents be shared via email or be accessible via a shared folder, website, or other collaboration platform?
- Where will project-related data (existing data or data to be collected) be shared? File sizes may factor into this decision.

Compensation
- Will group members be compensated in any way? For example, will travel expenses be reimbursed?

Decision Making
- Who will make the final decisions about project activities? It can be helpful to clearly state that the group is advisory, not a decision-making body or steering committee.

Ground Rules
- Are there ground rules for project meetings? If so, these could be included in a project charter and reiterated ahead of meetings.

Additional Information
- Is there any other information that would facilitate collaboration? For example, some projects lay out their core set of products or their timeline within a charter.

- Are there any visuals to help explain the group structure or a flow chart of project activities? If so, these could be included in the charter or other project overview reference.
- Be sure to include any relevant links and the primary point of contact for the group.