Project Charter

About this template:

This template should be completed after receiving the UTM Office of the Vice President & Principal’s PMO approval, prioritization, and recommendations in response to your Business Case, for all projects classified as a “Project”. The PMO staff will work with you to complete the Project Charter, which will be heavily informed by your Business Case. While the Business Case justified why this project is the best solution to the need at hand, the Project Charter will detail the what and how of the project’s objective and management and formally establishes the project as existing. The Project Charter will be the foundational document of your project.

|  |  |
| --- | --- |
| **Project Name** | [Enter name of project] |
| **Project ID** | [provided by PMO] |
| **Project Sponsor** | [Name], [Position], [Department] |
| **Project Owner** | [Name], [Position], [Department] |
| **Project Manager** | [Name], [Position], [Department] |

# Charter Introduction

## Revision History

For any edits, increment the version number by a decimal (starting from 0.1). Approvals will change the version number to the next whole number (starting from 1.0), any subsequent edits increment from there. E.g. 0.1 > 0.2 > 0.3 > 1.0 > 1.1 > 1.2 > 2.0, etc. When a new version is approved, remove the version numbering of any edits / drafts (decimal changes) and retain only the approved versions on the list. All approved versions will need to be retained in the project file. Add rows as needed.

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Description of Changes** |
| 1.0 | YYYY/MM/DD | Organization / Name | Baseline version |
|  |  |  |  |
|  |  |  |  |

## Executive Summary

Provide a brief overview of the purpose, results, and conclusions of this Project Charter condensed for the quick reading of an executive or manager. Summarize the project’s costs, timeline, deliverables, and results.

[Enter section here…]

## Project Authorization

This project charter formally authorizes the existence of the project, [Insert Project Name], and provides the Project Manager with the authority to apply organizational resources to project activities described herein. If there is a change in the project scope, the project charter will be updated and submitted for re-approval by the undersigned.

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*[Insert Name and Title]* Date

*Project Sponsor*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*[Insert Name and Title]* Date

*Project Owner*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*[Insert Name and Title]* Date

*Project Manager*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*[Insert Name and Title]* Date

*[Insert role of additional signees as needed]*

# Project Objective

## Current Situation

Define the current state of the business process, environment, or both. Provide background and context in support of the next section, the Business Need. What are the pain points and drivers for action? Identify at a high-level any strategic, financial, compliance, or operational risks that must be mitigated.

[Enter section here…]

## Business Need

What is the specific business opportunity or threat that this project will address?

[Enter section here…]

# Approach

## Project Description

At a high-level, describe the project solution as approved in the Business Case. Later sections will describe how the project will be implemented and success measured.

[Enter section here…]

## Goals

State the high-level goals that this project aims to accomplish. Include if and how this project aligns with any strategic, academic, or other organizational goals.

[Enter section here…]

## Objectives

Describe the specific objectives this project aims to achieve.

[Enter section here…]

# Success Criteria & Measures

## Success Criteria & Measures

List and describe the criteria that will be used to measure the success of the project. These criteria should be tied to the project goals/objectives listed above. Include the current state of those criteria and expected outcomes. Target state must be specific and measurable to demonstrate project success. High-level examples include improved efficiency, improved client satisfaction, and decreased organizational risk. A general project success criterion is included to start the list. Add rows as needed.

|  |  |  |
| --- | --- | --- |
| **Success Criteria** | **Current State** | **Target State** |
| Increase/Decrease/Improve <Some Value> | Current measurement of the value | Desired measurement of the value that will demonstrate success. |
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# Priorities

Indicate how the project will prioritize the triple constraints of projects (cost, time, scope) and quality. An example would be if the budget is absolutely fixed, then this may be the highest priority and the project needs to work towards completion within this budget even if it requires sacrificing other aspects such as developing the full scope, timeliness of completion, or product quality.

|  |
| --- |
| **Priority order for the project** |
|  |
|  |
|  |
|  |

# Scope

Clearly identify what is included within the scope of the project and explicitly state what is excluded (the “what”).

## In Scope

[Enter section here…]

## Out of Scope

[Enter section here…]

# Key Deliverables

Indicate and define what the project must deliver in order to achieve the stated objectives. Include internal project deliverables required by the project management process for review and approval purposes (e.g., project transition plan, communication plan, lessons learned register, etc.).

Include the acceptance criteria that will be used to assess the quality and completion of each deliverable. Indicate stakeholder(s) responsible for approving each deliverable and the deliverable’s due date. Add rows as needed.

|  |
| --- |
| **Project Deliverable 1: [Deliverable Name]** |
| **Stakeholder:** |  |
| **Description:** |  |
| **Acceptance Criteria:**  |  |
| **Due Date:**  |  |
| **Project Deliverable 2: [Deliverable Name]** |
| **Stakeholder:** |  |
| **Description:** |  |
| **Acceptance Criteria:**  |  |
| **Due Date:**  |  |

# Project Milestones

Identify the significant steps or events in the project. This table can also represent a high-level project schedule. Add rows as needed.

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| --- | --- | --- |
| **Milestone** | **Description** | **Expected Date** |
|  |  |  |
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# Estimated Budget

Estimate the costs associated with implementing this process and how it will be funded.

|  |  |  |
| --- | --- | --- |
| **Item** | **How funded** | **Amount** |
|  |  | $ |
|  |  | $ |
|  |  | $ |
| TOTAL | $ |

# Stakeholders

## Key Stakeholders

Complete the fields in the table below for all key stakeholders. Include the Project Sponsor, Project Manager, Project Owner, and all other members of the Project Team who are directly responsible for carrying out the tasks to fulfill the project. Additional key stakeholders include but are not limited to those who require consultation to inform the project planning or those greatly impacted by the project process or outcomes. Add rows as needed

|  |  |  |
| --- | --- | --- |
| **Key Stakeholders** | **Role to the project** | **Responsibilities/ Contribution** |
| [insert name and title] | Project Sponsor | * Ultimate decision-maker
* Provides project oversight and guidance.
* Reviews/approves some project elements.
* Approves changes to scope
 |
| [insert name and title] | Project Owner | * Defines the scope of the project
* Assembles project team
* Collects all requirements
* Accountable for successful project implementation
* Communication link between Sponsor and Project Manager
 |
| [insert name and title] | Project Manager | Manages project-level activities on behalf of Project Sponsor |
|  |  |  |

## Stakeholder Analysis

It is important to measure and understand the level of stakeholder power, interest, and engagement throughout the project. The level of stakeholder “interest” measures their level of concern over project outcomes. The level of stakeholder “power” measures their level of authority over the project

**Stakeholders can be classified as:**

Low interest/high influence = keep satisfied

Low interest/low influence = monitor

High interest/high influence = manage closely

High interest/low influence = keep informed

**Stakeholder engagement levels can be categorized as the following:**

* Unaware
* Resistant
* Neutral
* Supportive
* Leader

**It is important that corrective action is taken if a stakeholder with high interest and high power is resistant or unaware.**

Copy and paste the list of stakeholders in the chart above and insert them below. For each individual or group, categorize them accordingly.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Key Stakeholders** | **Role to the project** | **Interest level** | **Influence level** | **Engagement level** |
| [insert name and title] | Project Sponsor | Choose an item. | Choose an item. | Choose an item. |
| [insert name and title] | Project Owner | Choose an item. | Choose an item. | Choose an item. |
| [insert name and title] | Project Manager | Choose an item. | Choose an item. | Choose an item. |
|  |  | Choose an item. | Choose an item. | Choose an item. |

# Initial Communication plan

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Communication** | **Purpose** | **Method** | **Frequency** | **Owner** | **Audience** |
| ***Example:****Project status report* | *Review project status & discuss potential issues or delays* | *Email* | *Weekly* | *Project Manager* | *Project Sponsor, Project Team* |
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# Assumptions & Constraints

## Assumptions

State assumptions that, for planning purposes, are considered to be true, real, or certain. Examples of assumptions include: availability of funding, SMEs, equipment, etc. These assumptions will be validated during the planning process. Inaccurate, inconsistent, or incomplete assumptions result in project risks.

* [Describe assumption]
* [Describe assumption]
* [Describe assumption]

## Constraints

Identify the specific constraints or restrictions that limit or place conditions on the project, especially those associated with the project scope (e.g., limited resources, a hard deadline, a predetermined budget, contract provisions, etc.). Categorize the constraints as relating to time, budget, scope or resources. Add rows as needed.

|  |  |
| --- | --- |
| **Type of Constraint** | **Constraint Details** |
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# Risks

Identify the key barriers that could impede the processes and/or services provided by the project and provide the mitigation plan for each. Indicate the identify the likelihood of the risk happening and the severity of the risk if it occurred, using the table below as a guide. Add rows as needed.

|  |  |
| --- | --- |
| **Likelihood of Risk Occurring** | **Severity of Risk**  |
| 0-10% | Rare | Low | No attention apart from monitoring |
| 11-35% | Unlikely | Moderate | Immediate Attention |
| 36-65% | Possible | Major | Manager to monitor; attention & review by Pillar head |
| 66-90% | Likely | High | Attention & review by Principal |
| 91-100% | Almost Certain |

| **Risk Description** | **Likelihood** | **Severity** | **Mitigation Plan** |
| --- | --- | --- | --- |
|  | Choose an item. | Choose an item. |  |
|  | Choose an item. | Choose an item. |  |
|  | Choose an item. | Choose an item. |  |

# Dependencies

Identify the known dependencies in the below table.

| **Project** | **Description of Dependency** | **Timing** |
| --- | --- | --- |
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# Project References

Identify and describe the location of the key documents that define and establish the project such as the business case, the 5-year Financial Plan, strategic plan, academic plan, etc.

| **Document Title** | **Date** | **Author(s) (individual or office)** | **Location (link or file path)** |
| --- | --- | --- | --- |
| Business Plan |  |  |  |
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# Project Glossary

Define all terms and acronyms required to interpret the project charter properly. Add rows as needed.

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| --- | --- |
| **Term or Acronym** | **Definition** |
|  |  |
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