



**Project Charter Template**

This Project Charter Template is free for you to copy and use. Please feel free to provide comments and feedback to help us improve this template for future users. This template is to be distributed only through the PM Documents web site (<http://www.pmdocuments.com>)

Project Charter

[Project Name]

Date

[Company Name]

Address

City, State Zip

Contents

[1. Project Description 3](#_Toc333858467)

[2. Project Purpose 3](#_Toc333858468)

[3. Business Case 3](#_Toc333858469)

[4. Business Requirements 3](#_Toc333858470)

[5. Assumptions 3](#_Toc333858471)

[6. Constraints 3](#_Toc333858472)

[7. Risks 3](#_Toc333858473)

[8. Project Deliverables 4](#_Toc333858474)

[9. Project Milestones 4](#_Toc333858475)

[10. Project Manager 4](#_Toc333858476)

[11. Project Roles and Responsibilities 4](#_Toc333858477)

[12. Project Life Cycle Methodology and Tools 5](#_Toc333858478)

[13. Authorization 5](#_Toc333858479)

***Note: Select all (ctrl + A) and hit the "F9" key to update all document references and the table of contents***

## Project Description

Explain what the project is, and how it will be accomplished. Explain the ultimate intended outcome of the project. This should serve as a brief introduction. Provide some background about the history of how the project got to this point.

## Project Purpose

State the purpose of the project. Tie the purpose to the organization's strategic goals and objectives if possible. Tell the reader why this project is being started and what need it is fulfilling. Identify if there are any specific mandates, policies or laws that are driving this change.

## Business Case

Provide information on how the project going to benefit the organization. Discuss the alternatives that were considered, if any, and provide information on how the organization came to the selected approach.

## Business Requirements

Identify the high level business requirements that the project is going to fulfill. Remember that this is not a detailed list of system requirements.

## Assumptions

Assumptions are conditions at the start of the project that must be considered. For example, when developing the new software system that is going to take 3 years to fully complete, an assumption could be that the project budget is approved each year for three years so that the project scope is not impacted.

## Constraints

Constraints are situations or events on the ground that must be considered and accounted, for which the project has no control over. For example, a constraint can be a hard deadline or completion date. Other constraints could be resources, tools or hardware -- so that if the project has no budget for additional servers, then the project must find a way to develop the new system using the hardware already in place. This could mean juggling servers to fit specific development environment needs while ensuring that the production environment stays up.

## Risks

State the known risks. These risks are generally at a high level since not much is known about the details of the project yet. If a Benefit-Cost Analysis was performed, then risks identified during the Benefit Cost Analysis should be placed here. For example, if the project is going to span 5 years and touch multiple third party systems, then integration and technology change would be risks to consider here. For examples on how to write a risk statement, visit <http://www.pmdocuments.com/category/risk-management/>

## Project Deliverables

Document what is going to be delivered at the completion of the project.

## Project Milestones

Identify the project milestones.

|  |  |  |
| --- | --- | --- |
| Milestone Date | Milestone Name | Milestone Description |
| [Jan 1] | System Requirements Complete | System requirements version 1.0 are approved and baselined so that the project can begin design and development. |
| [June 1] | Development Complet | Software development is complete and ready for integration testing |
| [Dec 1] | Deployed to Production | System passes integration and end-user acceptance testing and is deployed to production |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Project Manager

Identify the project manager here. It is important to clearly identify the project manager so that the project manager has the authority to complete the project. Provide a quick professionaly biography if available. Explain as clearly as possible, the roles and responsibilities of the project manager. Explain the project manager's levels of authority with respect to resource allocation, schedule modifications and purchasing authority. Review the nine knowledge areas of the Project Management Body of Knowledge (PMBOK) and think about the role that the project manager will fill in each of the areas.

## Project Roles and Responsibilities

Define the other key roles and responsibilities within the project team. For example, if the project team has functional team leads, then document them here. The table below provides a quick way to identify specific people within a role:

|  |  |  |
| --- | --- | --- |
| Name | Role | Responsibilities |
| Jane Smith | Risk Management Team Lead | Lead the risk management team to ensure risk identification, analysis and mitigation. |
| John Smith | Testing Lead | * Plan and complete testing in all stages of testing.
* Maintain traceability to requirements to ensure that all requirements are tested.
* Responsible for testing tools
 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Project Life Cycle Methodology and Tools

Identify what project management methodology the project will be using. In many instances, organizations have their own proprietary version of a waterfall-type life cycle. They may also have their own preferred tools for managing the project management assets (e.g., DOORS for managing requirements; SharePoint for document management and versioning; Other risk management and testing tools etc.).

## Authorization

Provide the names of those business sponsors that must sign the Project Charter. Once the project Charter is signed by the project sponsors, the project is authorized to start.

Approved by the Project Sponsor:

 Date:

[Project Sponsor]

[Project Sponsor Title], [Project Sponsor Organization or Division]

***Note: Add other signatories as needed***