**PROJECT CHARTER**

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# Revisions

|  |  |  |
| --- | --- | --- |
| Revision Number<Begin revision history after first, non-draft release.> | Date<Date in the format month day, year> | Description |
|  |  |  |
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# Purpose of the Project Charter

The Project Charter serves several purposes:

* Clearly states the problem that needs to be solved
* Suggests an initial approach to solve the problem
* Defines high-level expectations
* Establishes a Project Charter Statement
* Serves as sponsor's authorization to proceed to Initiation phase

The Project Charter is a pre-requisite to performing the Initiation phase of a project. The Project Initiation phase brings together key team members through a structured process to identify the project requirements, to set expectations, uncover hidden issues and misunderstandings, and lay the foundation for a successful project by developing agreed-upon objectives, tasks, schedules, and project requirements.

# Problem Definition

Define the business problem that needs to be solved, and document the background of the problem.

**Clarifying Questions**

* Why is the project being commissioned?
* What are the business needs that this project will solve?
* How will this project improve the business?
* What is the basic project objective?

# Initial Approach

Document the initial thoughts on how the problem will be approached, supporting the charter statement.

**Clarifying Questions**

* What deliverables are expected from this project?
* How will the stakeholders know this project is successful?
* What metrics does the sponsor think should be tracked to know if they are satisfied with the project?
* How much risk can the project team take on to ensure the efforts meet the client's success criteria?
* How much risk is the organization willing to accept (for example, staff stress levels, organizational change tolerance, etc.)?
* Are there any specific issues that should be noted (for example, policy changes, requirement to be emphasized or eliminated, etc.)?

# Assumptions and Constraints

The known assumptions and constraints that will affect this project are listed below:

**Assumptions**

* Example Assumptions may include:
* resource availability
* specific vendors or systems
* phasing approach
* specific organizations or geographic areas

**Constraints**

* Example Constraints may include:
* Predefined budget?
* Required project finish?
* External impacts?

# Project Flexibility

During the project definition process, the project team will require guidance regarding flexibility of scope, schedule and resources.

**Clarifying Questions**

* As project boundaries or constraints are being identified, how do you want the project team to handle them?
* Can the Project Scope be broadened?
* Can the Project Cost increase, and by how much?
* Can the Project Schedule be extended, and by how long?
* What is the relative flexibility of Scope, Schedule and Resources (least flexible, somewhat flexible, most flexible)?

# Charter Statement

* What is the overall vision that this project will support?
* Example:
* To be the industry leader in our ability to procure products and services through a real-time e-commerce procurement solution with automated workflow processes.
* **Note:** The charter statement is more strategic in nature than a Project Objective Statement (POS), which specifically addresses project scope, schedule and resource goals.

# Key Contacts

The following individuals will be participating in the initial project definition effort.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Project Role** | **Organization** | **Contact Info** |
|  | Project Sponsor |  |  |
|  | Stakeholder/Subject Matter Expert (SME) |  |  |
|  | Stakeholder/SME |  |  |
|  | SME |  |  |
|  | Project Management Oversight |  |  |
|  | Project Manager |  |  |

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# Sponsor's Authorization to Proceed

* <Name>, Project Sponsor, authorizes the following actions to further address the business needs stated in this charter:
* Example: To proceed with the high-level tasks outlined in the project approach.
* Example: Perform a Project Initiation Workshop (PIW) to define project requirements.

# Appendix A: Glossary, Terms, and Acronyms

|  |  |
| --- | --- |
| FSS | Financial Systems Support |
| GW | The George Washington University |
| ISS | Information Systems Support |
| PIW | Project Initiation Workshop |
| POS | Project Objective Statement |
| SME | Subject Matter Expert |