

Project Charter

Project Title	
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Charter Date	
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Project Team and Responsibilities

Executive Sponsors	<ul style="list-style-type: none"> • Director Name • Chief Director Name • Senior Sponsor Name
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Steering Committee	<ul style="list-style-type: none"> • Person 1 • Person 2 • Person 3
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Name	Roll / Responsibility
Director , Mike Smith	<ul style="list-style-type: none"> • Responsible for all operations.
Steering Committee	<ul style="list-style-type: none"> • Provide executive leadership and direction for the organization • Establish policies.
Project Sponsor , Jane Smith	<ul style="list-style-type: none"> • Reports to the Director. • Provides written status updates as required. • Provides direction and responsible to oversee the activities of the project. • Maintains authority and responsibility for the project once it has been approved by the Steering Committee.
Project Manager , Tom Carlos	<ul style="list-style-type: none"> • Reports to the Project Sponsor. • Manages daily activities of the project. • Provides weekly updates to the Sponsor and Steering Committee • Oversees working groups and provides direction to team members. • Responsible for the delivery of the project.
Working Group	<ul style="list-style-type: none"> • Formed to support the efforts of the facilities project. • Consists of key stakeholders, from the various divisions affected by the project, who understand how the various business units work. • Provide information and input regarding how the organizations and its processes work. • Identify and analyze problems. • Meet on weekly basis and complete tasks as needed.
Subject Matter Experts	<ul style="list-style-type: none"> • Key stakeholders, from the various divisions affected by the project, who understand how the various business units work. • Provide information and input regarding how the process works, its problems, and needs.

Team Members	<ul style="list-style-type: none"> • Person 1 • Person 2 • Person 3
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Subject Matter Experts	<ul style="list-style-type: none"> • Person 1 • Person 2 • Person 3
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Mission Statement

At a high level, describe why this project is being undertaken and the purpose. Do not list specific deliverables or how they will be accomplished.

Justification

Explain “why” this project needs to be undertaken. What is the problem or opportunity that needs to be addressed?, reduced costs / increased profitability, or conformance to regulations.

Scope

Write a scope statement that addresses the five w’s.

Major Deliverables

Provide a list of the “major” deliverables. Describe this at a high level.

Deliverable 1	This will do the following...
Deliverable 2	This will do the following...
Deliverable 3	This will do the following...

Goals and Objectives

Describe the most important goals and objectives.

Goal 1	Explain here
Goal 2	Explain here
Objective 1	Explain here
Objective 2	Explain here

General Approach

At a high level, describe the approach that will be followed to undertake the project.

- The project will consist of three sub-projects
- The teams will work in parallel and completing work at simultaneous intervals
- The work will be completed by internal resources and supplemented by contractors were needed
- The outputs will be fully tested and system run in parallel with our existing system for one month
- If testing is successful, the target cutover date is MM/DD/YYYY

Project Priority

- During the Planning Phase, consideration must be given to “priorities” as they relate to three areas.
- During the Execution and Controlling Phases, these priorities may need to be revisited in the event decisions must be made with regards to changes in scope.
- The Project Director must identify how these priorities will rank in importance to each other.
- Using the matrix below, decisions (can be made based on a priority level) which will allow a project manager to make adjustments to a project, based on priorities. The Project Director must assign one “X” per column and one “X” per row.

RSS Matrix			
	Least	Somewhat	Most
Resources	X		
Schedule		X	
Scope			X

Prelim Milestone and Target Schedule

This is a high level schedule. Enter the milestone and start/end dates for event.

Milestone	Start Date	End Date
Milestone Target Date #1	MM/DD/YYYY	MM/DD/YYYY
Milestone Target Date #2	MM/DD/YYYY	MM/DD/YYYY
Milestone Target Date #3	MM/DD/YYYY	MM/DD/YYYY

Budget and Financial Estimates

This initial estimate should be at a high level and not show specific details. Backup documentation should be available (accompanied with an explanation for the method of estimation). The budget must be evaluated continuously throughout the life of the project.

Item	Qty	Cost	Sub-total
Item 1			\$\$\$
Item 2			\$\$\$
Item 3			\$\$\$
Item 3			\$\$\$
Total			\$\$\$

Initial Assumptions

List all (initial) assumptions that exist for the project.

Availability	That all team members will be available for work throughout the life of the project.
Project Conflicts	That team members will work on this project before their existing duties
Management Support	That management fully supports this project and will fund the project adequately

Constraints

List all (initial) constraints that exist for the project.

Budget	There is a fixed budget that cannot be exceeded
Due Date	The due date for this project cannot change

Risks

List risk (initial) events that are know. This list must be expanded in the project's Risk Management Plan.

Requirements	<ul style="list-style-type: none">• That requirements will be misinterpreted by the team
Stakeholder participation	<ul style="list-style-type: none">• Stakeholders will not participate and voice concerns during the project initiation phase, which could lead to change orders once the project has commenced.
Unforeseen problems	<ul style="list-style-type: none">• Unforeseen problems may occur and could impact the project

Executive Approval

Name	
Title	
Date	

Name	
Title	
Date	

Name	
Title	
Date	