Project Charter

CONTENTS

Project Charter

Purpose

The purpose of this document is to formally outline and define the project vision, objectives and goals and will include the following:

- Description
- Business case and benefits
- Key Milestones and Deliverables
- Scope
- Roles and responsibilities
- Change and Issue Management
- Approval & Sign Off

Business Case & Benefits

Description

The Business Case should address these questions:

- Why is this project worth doing?
- Why is it important to do now?
- What are the consequences of not doing this project?
- How does it fit in with business initiatives and targets?

PROJECT BUSINESS CASE	
Contribution to Business Strategy	
Options Considered	
Benefits/Value	
Timescales	
Costs	
Expected Return on Investment	
Risks	
Cost of Doing Nothing	
Metrics	

Key Milestones

Description

Create an estimated schedule related to the project milestones. Table should include actual milestone accomplishment plus either a specific target date or a date range if unknown at this point.

KEY MILESTONES	TARGET DATE

Project Scope

Project scope provides a clear picture of what the achievements of the project are as well as what activities and departments fall under the project activities and deliverables.

Action Items:

- Insert Project Vision – No longer than 2 sentences.
- Insert general project objectives and how they will be met. Ensure objectives are specific, measurable, achievable, and realistic.
- Insert sub-objectives if necessary and relevant.
- Insert departments, workflows, and data that will be affected/impacted by the project.
- Insert any areas, departments, or other areas that will NOT be included within the project scope.

Project Team

Roles & Responsibilities

Action Items:

Insert information in the table below as identified in the project scoping documents.

NAME	ROLE	DEPARTMENT	PHONE	EMAIL

Key Assumptions

As assumptions are identified for the project, stakeholders should be mindful of these as failure to adhere may result in undue risk being introduced to the project.

- The parties shall work together to ensure effective project execution and fulfillment of contractual obligations and key deliverables.
- All changes to the baseline project plan(s), project timeline, or scope documents shall be reviewed and mutually agreed upon by the leadership team as part of approved project change control.
- [Include any additional project-specific Key Assumptions]

Constraints

All listed project constraints may cause the delay or even failure of the overall project. Project Manager(s) will monitor these risks and will report to the Executive stakeholders when a risk or constraint threatens the success of the project. External stakeholders will be tasked with final decision making when risks are identified.

Action Items:

Insert All Project Constraints. To include: Financial, Timeframe, Executive or Board Buy-In, Employee Adoption, Third Party Vendors or Agreements, State or Federal Corrective Action Plans, Position Vacancies, etc.

PROJECT CONSTRAINTS	IMPACT	REMEDIATION PLAN
FINANCIAL		
TIMEFRAME		
ETC.		

Change and Issue Management

All Change and Issue Management documentation shall be kept in a Project RAID Log, accessible to all Project Team Members.

All items will be tracked and reported up to the Executive Steering Committee. All issues requiring resolution shall be discussed and resolved in either the Executive Steering Committee or, if an issue is of an emergent nature, an ad hoc Executive meeting or conference call.

All project changes requiring a modification to either the project scope, timeline, budget, or resources must be approved by the Executive Sponsor and/or the Executive Steering Committee. This approval must be obtained prior to incorporation into the Project Plan.

Communications and Control

Ongoing communication, with both internal and external team members, is crucial to the success of any project. Project communication plans and strategy will be documented in the Communications Plan developed by the Project Team.

Action Items:

Insert Communication Plan where appropriate.

Project Team members will communicate in the following manner

- All Project Team Members will communicate progress to the Project Manager(s) either via email or in-person during team meetings. [Or Client Project Management Software]
- If any team member identifies an issue during the life of the project, the Project Manager(s) will be contacted immediately.
- Issues identified must first be highlighted with either the internal or external Project Manager. If a resolution cannot be identified, the issue shall be escalated to the Executive Sponsor.
- Project Risks, bottlenecks, and engagement issues will be communicated to the Executive Stakeholders on an ongoing basis during the life of the project.

Approval

Project Sign-Off

The undersigned accept this Project Charter and its approach as described herein.

PRINT NAME | _____ **TITLE** | _____

SIGNATURE | _____ **DATE** | _____

PRINT NAME | _____ **TITLE** | _____

SIGNATURE | _____ **DATE** | _____

Note: Additional signatures might be required if the document changes significantly