Instructions for:

Project Charter

The Project Charter formally authorizes a project or phase and provides the project manager with the authority to apply organizational resources to project activities. The Project Charter is produced by the Project Sponsor or Owner and is used to formally recognize the existence of the project and its basic scope, stakeholders, and boundaries.

**Fields:**

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| Project Scope | Defines, on a conceptual level, what is and isn't included in the project's work. Sets a project’s boundaries, objectives, deliverables, and key requirements, ensuring clarity for stakeholders. |
| Business Case | The business justification for the initiation of the project. It outlines the rationale, benefits, costs, risks, and potential returns, providing stakeholders with the information needed to decide whether to proceed. It aligns the project with strategic business goals and assesses feasibility. |
| Key Deliverables and/or Milestones | Significant points or events that are envisioned within the project's timeline that mark progress. Critical achievements, like the completion of major phases or deliverables, and are used to assess project health, manage expectations, and ensure alignment with strategic goals. |
| Key Stakeholders | The individuals, groups, or organizations with a significant interest or influence in a project's outcome. They can include project sponsors, customers, employees, investors, and regulatory bodies. Their engagement is crucial for project success, as they can affect or be affected by the project's execution and results. |
| Funding Sources and Status | The required funding sources and their status as of project creation, as well as any details about the status of future funding. Project funding sources include internal budgets, loans, grants, equity investments, sponsorships, and crowdfunding. |
| Project Manager Authority Level | The designation of the project manager's authority to manage organizational resources to achieve the project's objectives. |
| Project Requirements | Project requirements specify the deliverables needed to achieve project objectives. They include functional, technical, and performance criteria, detailing stakeholder needs and expectations. |
| Assumptions | Unverified conditions or statements presumed true for planning purposes. Assumptions guide decisions but require validation to mitigate risks, ensuring alignment with project goals and minimizing potential disruptions. |

**Related Documents:**

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| Project Management Plan | Provides the overall plan as to how the project will achieve its objectives. It outlines the strategy for executing, monitoring, and closing a project, including scope, schedule, budget, resources, risks, quality, and communication plans to guide the project team. |
| Stakeholder Engagement Plan | Provides the overall plan as to how the stakeholders will be identified and communicated with. Outlines communication strategies, roles, responsibilities, and methods to manage expectations and interests. |
| Project Schedule | A timeline that maps out when project activities will occur. It includes start and end dates for tasks and milestones, ensuring resources are allocated efficiently and aiding in tracking progress to meet project deadlines. |
| Project Budget | An estimate of all costs associated with a project, detailing expenses for labor, materials, equipment, and other resources. It serves as a financial plan to monitor and control spending, ensuring the project stays within financial constraints while meeting its goals. |
| Quality Management Plan | Outlines strategies to ensure a project meets its quality standards. It includes quality assurance processes, control methods, and improvement activities. It defines quality objectives, metrics, and procedures for inspections, audits, and corrective actions to achieve customer satisfaction. |
| Risk Management Plan | Identifies, assesses, and prioritizes potential risks to a project. It outlines strategies for mitigating, avoiding, or transferring risks, and includes contingency plans for unforeseen issues. |