**Project Charter Instructions**

**The Project Charter template provides teams a one-page document that capture the Why, What, Who, How, and When of a project.**

**(SMART) Project Description**

* Describe the project’s purpose using the SMART (Specific, Measurable, Achievable, Realistic, and Timely) approach. This provides clarity to the expectations of What and When.

**Outcomes**

* Note “What success for this project looks like”—the end state it seeks. This provides the Why of the project—the overall intent its scope will pursue.

**Project Need (Reasoning or Catalyst behind the project)**

* Provide key reasons why the project is happening or seeking to achieve.
* These reasons are specific metrics that support the Outcomes and may be measured against to determine if the project was successful.

**Project Dates**

* Note the Original “Expected Start” date of the project, the “Actual Start” date, and the forecasted “Expected End” (project completion) date.

**Project Budget**

* Note the Total Approved Budget for the project.

**Stakeholders**

* List key people, business units or departments, and companies that are associated with the project.

**Scope**

* List the key features and/or functions of the project or product. This “What” the project is working towards—the final output against which it may be measured for completeness.
* Also, note items that are not included in the project scope or effort. This helps clarify what is not part of the project to the reader.

**Milestones**

* List any key events and/or dates for the project.
* The “Baseline” date refers to the date committed to at the time of project approval—it is the date by which the project is measured against.
* The “Expected” date is the current, forecasted completion date.
* The “Completed” date is the actual date the milestone was completed.
* If the dates are dependent on other key events (e.g. project approval), then the dates may be noted as “+ *x days*” (e.g. + 4months) to demonstrate the duration once the prior event completes.

**Dependencies, Assumptions, & Risks**

* Note any key dependencies regarding Time, Resources (People, Cost, or Material), Hardware/Software, Communications, or Legal. A key dependency means your project is reliant on some external commitment, action, or decision.
* Assumptions: list any current, key assumptions the project has not validated.
* Risks: list any key risks that could affect the project’s scope, time, or cost.

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| <Project Name> Project Charter | | | | | | | | |
| **(S.M.A.R.T.) Project Description** |  | | | | | | | |
| **Outcomes** |  | | | | | | | |
| **Project Need (Reasoning or Catalyst behind the project)** |  | | | | | | | |
| **Project Dates** | **Expected Start** | **Actual Start** | | **Expected End** | | **Project Budget** | | |
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| **Stakeholders** | **Internal** | | | **Vendors** | | **Partners** | | |
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|  | **Requirements Related to Both Project and Product Scope** | | | | | | | |
| **Scope** | **Describe the features & functions**  **of the product / project** | | | **What will NOT be done in this project** | | | | |
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| **Milestones** | **List the milestones below** | | | **Baseline** | **Expected** | | **Completed** | |
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| **Dependencies, Assumptions, & Risks** | **Dependencies** | | | **Assumptions** | | | | |
| **Time:** | | | 1. | | | | |
| **Resource(s):** | | | 2. | | | | |
| **Hardware/Software:** | | | 3. | | | | |
| **Equipment:** | | | **Risks** | | | | |
| **Communication:** | | | 1. | | | | |
| **Legal:** | | | 2. | | | | |
| **Other:** | | | 3. | | | | |
| **Signatures** | **Project Sponsor** | | | **Project Manager** | | | | |
| Printed Name: | | | Printed Name: | | | | |
|  | |  |  | | | |  |
| Signature | | Date | Signature | | | | Date |