

Project Charter

[Insert Project Name]

# <Project Name> Project Charter

**Purpose of Project Charter**

The purpose of the project charter is to clearly outline what is to be done and authorize the Project Manager to proceed and apply organizational resources. The charter provides the opportunity for the sponsor to authorize the project based on measurable objectives in relation to a business need, and defined parameters such as scope, milestones, roles, responsibilities, and budget. The project charter is not meant to approve the project, which was done through intake, nor to document how things will be done, which is done through planning (after initiation is complete). It is simply documentation around the authorization provided to the Project Manager for that project. The project charter is part of the [Project Management Office's](https://uwaterloo.ca/ist-project-management-office/) project [initiation process](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/initiation).

A project charter is required as part of the project initiation process. As you create the project charter, refer to the [project complexity chart](https://uwaterloo.ca/ist-project-management-office/methodologies/project-sizing-and-complexity). Sizing the complexity of the project will assist in determining the context for risks, resources, and project management deliverables.

**Project Charter Participants and Approvers**

Input into the project charter may come from many different sources including, but not limited to, Sponsor, senior leadership, project intake form and/or business case, initial analysis/research done when proposing the project, subject matter experts within business unit(s), and other stakeholders (such as staff, students, faculty).

The author is typically the [Project Manager](https://uwaterloo.ca/ist-project-management-office/methodologies/roles-and-responsibilities/project-manager) for the project. If somebody else authors the charter, the Project Manager will still provide a signature that they agree to execute the project according to the documented parameters.

The approver of the project charter is the [Sponsor](https://uwaterloo.ca/ist-project-management-office/methodologies/roles-and-responsibilities/projectprogram-sponsor).

If the project will impact people, ensure to apply [change management](https://uwaterloo.ca/change-management/services-0) approach from the point of project initiation.

**Instructions:**

1. Research and understand project information by reading any prior documentation (such as intake form, business case, research/analysis, and lessons learned for similar projects) and speaking to the Sponsor and other stakeholders. The Project Artifact Library is one source of information ([contact the PMO](https://uwaterloo.atlassian.net/servicedesk/customer/portal/2221/group/2770/create/5151) for project artifact samples).
2. Create the project charter with input from applicable stakeholders and Sponsor by filling out the sections in the template. The orange italic text contains instructions for filling out the template and can be removed for the final version of the document.
3. Review charter with applicable stakeholders for accuracy and completeness, if required.
4. Obtain appropriate approval for project charter to indicate agreement between the Project Manager and Sponsor about the parameters of the project and authorize the Project Manager to begin.
5. Scan the approved project charter and send it to the PMO to add it to the Project Artifact Library.

**Next Steps**

Once the project charter has been approved, the Project Manager can begin the stakeholder analysis and fill out the initial version of the stakeholder register to understand who needs to be represented on the Project Team. Based on the Project Manager’s understanding of stakeholders, he/she can then talk to Functional Managers to negotiate time from their resources for the project and schedule a project kickoff meeting. The Project Manager can also start documenting the risks in a [risk register.](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/planning/raid-log)

# Project Purpose

Instructions: Provide a paragraph or two describing the project and the benefit it is expected to deliver. This should include who benefits from it. Links to previous project documents such as the business case or intake form can be included to keep this section brief.

[Insert Introduction]

# Scope

Instructions: Provide a high-level description of the project’s scope. This should include what is within scope, and what is not in scope. Include any assumptions pertaining to scope. For larger projects, this description is high level and there should be a reference to a more detailed scope description in the Project Management Plan.

[Insert Scope]

# Success Criteria

Instructions: Describe what criteria will be used to measure the [success of the project](https://uwaterloo.ca/ist-project-management-office/methodologies/project-success), known at the time of initiation, by providing measurable objectives and benefits in the charts below. Consideration should be given to what can be measured upon project closure, versus what may have to be measured after closure and transitioned to the functional manager who is in charge of the product/service from an operations perspective after project closure. Each category below may have a different number of criteria. It is understood that this list will change as the project evolves through planning and execution.

Project delivery success will be measured based upon whether the project delivered what was asked for, whether there are benefits to what was delivered, and the process to get there. The list of preliminary success criteria is listed in the charts below. This list will be further expanded with changes tracked in the project management plan.

**Success of Product/Service (Scope, Requirements, Quality, Functionality)** (Instructions: Required for all sized projects)

How will it be determined that what is delivered is what was asked for, relevant to constraints such as scope (requirements, functionality, et cetera), and quality?

| Criteria for Success of Product/Service  | Planned Measurement(s) |
| --- | --- |
| Example: The product delivers a fully functioning, automated process for creating and approving a monthly staff complement job posting that reduces paper by 85% | Examples:* Is the entire process for hiring managers to post a monthly staff job posting automated, including approvals?
* # of paper job postings HR receives vs # of job postings done in the system by hiring managers
 |
|  |  |
|  |  |

**Success of Outcome (delivery of benefits/objectives)** (Instructions: Required for all sized projects)

How will it be determined that what is delivered provides benefit to people?

| Criteria for Success of Outcome | Planned Measurement(s) |
| --- | --- |
| Example: Ensure minimal disruption of university services due to employee turnover by reducing the time to create a job opening, have it approved, and posted  | Examples: * # of days between the drafted posting date/time stamp and the posted date/time stamp for a job posting
* # of days to fill an open position
* Hiring manager satisfaction with new automated process
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|  |  |
|  |  |

**Success of Process (how the project was managed)** (Instructions: Required for all large projects; optional for small and medium projects depending upon context of project)

How will it be determined that the process that was followed to achieve the project’s end deliverable(s) was successful (considering process activities such as resource management, budget management, schedule management, project team satisfaction, change management, communication, transition to operations, sponsor satisfaction, procurement management, et cetera)?

| Criteria for Success of Process | Planned Measurement(s) |
| --- | --- |
| Example:The project constraints were managed efficiently by the Project Manager | Examples:* # of days/months variance after December 31, 2020 target date (time constraint)
* Budget variance is within planned contingency with no additional funds requested (budget constraint)
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|  |  |
|  |  |

# Constraints

Instructions: Provide a list of any known project constraints (restrictions that could affect the performance of the project that limit resources, schedule, or scope and could affect quality) at the time of initiation. It is understood that this list is subject to change as the project evolves through planning and execution.

It is important for the Project Manager to understand which of the resource/schedule/scope constraints are most to least flexible within the project as well. Include this information by making one ‘x’ on each row in the Triple Constraint Flexibility Matrix below. Being aware of the most critical demands helps the project manager to make appropriate adjustments necessary to keep the project on course and provides guidance on the Project Sponsor’s level of flexibility in these areas when determining trade-offs in planning and change control.

Triple Constraint Flexibility Matrix

Note: put only one constraint per column to identify where trade-offs exist

|  |  |  |  |
| --- | --- | --- | --- |
| Flexibility: | Least | Somewhat | Most |
| Resources |  |  |  |
| Schedule |  |  |  |
| Scope |  |  |  |

Instructions: Write a one sentence statement for each constraint for why it is rated according to flexibility. For example, Resources: Least flexible on the project as resources are shared and expertise is with one technical resource.

# Dependencies

Instructions: Provide a list of any project dependencies that are known at the time of initiation. It is understood that this list is subject to change as the project evolves through planning and execution.

[Insert Dependencies]

# Budget

Instructions: Provide the source of funding, and an estimation of project costs that are known at the time of initiation. List any assumptions pertaining to the budget. It is understood that this can change as the project evolves through planning and execution, and that budget will be tracked and managed accordingly in a separate document. (Note: if no costs are anticipated, state that and mention that if costs are identified later, they will be presented to the project sponsor for review/approval.

[Insert Budget]

# Deliverables and Milestones

Instructions: List known deliverables and milestones for the project, and possible timelines (if known). It is understood at the time of initiation that this list is subject to change as the project evolves through planning and execution.

[Insert Deliverables/Milestones and the Timeline]

# Resource Roles and Responsibilities

Instructions: There are documented standard project roles and responsibilities on the PMO website that can be used for projects. During project planning and execution, there can be further conversations about roles and responsibilities, and who will be assigned to the project roles. This information (changes to roles and responsibilities, who is doing what) can be documented once decisions are made in the [RACI](https://uwaterloo.ca/ist-project-management-office/tools-and-templates/tools/identifying-roles-and-responsibilities), in a [project management plan](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/planning/project-management-plan), or in a separate roles and responsibilities document. Some of the roles may include those listed in the table.

The standard project [roles and responsibilities](https://uwaterloo.ca/ist-project-management-office/methodologies/roles-and-responsibilities), as documented and published by the PMO, will be used for this project unless otherwise discussed and documented during project planning and execution in the project management plan and/or project RACI.

|  |  |  |
| --- | --- | --- |
| **Roles** | **Responsibilities** | **Person Responsible** |
| Project Steering Committee |  |  |
| Project Sponsor |  |  |
| Project/product owner |  |  |
| Project Manager |  |  |
| Business Analyst | <https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/business-analyst> |  |
| Project Business lead |  |  |
| Functional manager |  |  |
| Application Technical Lead |  |  |
| Communications Lead |  |  |
| Change Manager |  |  |
| Core Functional Project Team |  |  |
| Reporting Lead |  |  |
| RFP Evaluation Team (SMEs) |  |  |
| Key Stakeholders Representatives (Examples: Finance Rep, Human Resources, Library Rep) |  |  |
| Subject Matter Experts |  |  |

# Approvals

This charter formally authorizes the Project Manager to proceed with forming the Project Team and project kickoff based on the parameters outlined and the information known at the time of project initiation. It is understood that some of this information may change during planning and execution and, if so, will be discussed and documented through proper project change management processes.

Project Charter Approval Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sponsor Authorization: [print name of Sponsor, title here]

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Project Manager Acknowledgement: [print Project Manager name, title here]

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# Revision History

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| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
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