Project Management Essentials

**Charter**

Template

June 4, 2021

# Template Description

**Purpose**

*The Project Charter officially authorizes the project and allocates resources. The chartering process forms the project core team and officially kicks off the project.*

**How to Use**

*The Charter is where you will define a project scope, create an estimated timeline, and establish a project budget. Once this document has been completed and approved, the Initiation Phase closes and the project moves into the Planning Phase.*

**Best Practice**

*Project Charters should be developed cooperatively with the project core team and approved by the Project Sponsor, Business Owner, and resource owners.*

Note: The PM Lite Project Charter Template is customizable as you see fit, on a per project basis, meeting specific needs of the project and/or your organization’s policies. The below sections are suggestions but can be tailored as applicable.

\*\* NOTE: Please remove this page and contents with brackets [ ] when creating your Charter.\*\*

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Charter for [Project name]

# Project Charter

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project name** | **Division** | **Author** | **Version** | **Version date** |
|  |  |  |  |  |

*Approval of the Project Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work will be initiated on this project and necessary resources are committed as described herein.*

| Approver Name | Title | Signature | Date |
| --- | --- | --- | --- |
|  | Project Sponsor\* |  |  |
|  | Business Owner |  |  |
|  | Chief Financial Officer\* |  |  |
|  | PMO Director (optional) |  |  |
|  | [add others as needed] |  |  |

\*By authorizing this Charter the Project Sponsor and Chief Financial Officer agree to budget and funding source.

# Project Overview

## Project Description

*Provide a high-level description of the project, what business issue or need is being addressed, as stated in the Business Case.*

|  |
| --- |
| **Project description** |
|  |

## Alignment to Business Goals/ Objectives

*Define what specific business goals and objectives, as identified in Section 2.2\* of the Business Case, will be met as a deliverable from this project. If new business goal or objective put “new”.*

| **Business Case ID\*** | **Business Goal /Objective** |
| --- | --- |
| BC001 |  |
| BC002 |  |
| BC003 |  |
| BC004 |  |
| [add others as needed] |  |

\*Refer to the Business Case to obtain Reference ID/Reference Number of the related Business Goal/Objective.

## Project Scope

*The scope defines project limits and identifies the products and/or services delivered by the project. The scope establishes the boundaries of the project. The project scope definition should also describe products and/or services that are outside of the project scope.*

| # | Project Includes |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |

| # | Project Excludes |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |

## Product Deliverables

*Describe the end product that will be delivered as the result of this project. Briefly describe what the product will look like, who will it service, who will use the product, who will maintain the product once it is delivered, etc.? This section may be transferrable, or at least useful, in those circumstances where external vendor project/support services will be solicited.*

| # | Product deliverable | Description |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

## High Level Project/Product Requirements

*Describe the high-level project or product requirements that must be met to satisfy the business objectives and identify which business objective/goal, as defined in Section 2.2, the requirement aligns to. Make sure all business cases are addressed in the high level requirements. This information may be transferable, or at least useful, if/when compiling a Statement of Work or Request for Offer/Proposal from external vendors. If more robust Requirement specifications are needed, use the “PM Essentials 2.0 Requirements Document Template” in addition to the table below.*

| HLR ID | Project/Product Requirement | Business Case ID |
| --- | --- | --- |
| HLR001 |  | BC001 |
| HLR002 |  |  |
| HLR003 |  |  |
| HLR004 |  |  |
| [add others as needed] |  |  |

## Key Project Milestones and Deliverables

*List the major milestones and deliverables and their planned finish dates. This list should reflect products and/or services included with this project, as well as the delivery of key project management or other project-related deliverables.*

| # | Milestone/Deliverable | Planned Finish Date\* |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 | [add others as needed] |  |

\*Planned finish dates defined here are high-level. Project schedules and timelines should be finalized in a more formal Work Breakdown Schedule, activity identification/sequencing/estimating exercise.

## Project Budget

*Identify the funding amount, source of authorization, and method of funding (e.g., capital budget, rider authority, appropriated receipts) approved for the project. Project budget represents amount of funds allocated to the project to complete the project objectives and cover project costs.*

| **#** | **Amount** | **Source** | **Authorizing Body** |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 | [add others as needed] |  |  |

## Assumptions, Constraints, Dependencies

*This section exists in the Business Case template as well. This area is provided here to elaborate on those noted in the business case and/or add to the list already established.*

### Assumptions

*Describe the assumptions made in establishing this project’s requirements, scope, timeline, and budget.*

|  |  |
| --- | --- |
| **#** | **Assumptions** |
| 1 |  |
| 2 | [add others as needed] |

### Constraints/Limitations

*Describe the constraints and/or limiting factors that can affect the project.*

|  |  |
| --- | --- |
| **#** | **Constraints/Limitations** |
| 1 |  |
| 2 | [add others as needed] |

### Dependencies

*Describe the dependencies that can affect the project. Include any dependencies on existing projects, work streams, and/or systems.*

|  |  |
| --- | --- |
| **#** | **Dependencies** |
| 1 |  |
| 2 | [add others as needed] |

## Risks

*Describe the risks that may impact the successful delivery of this project’s end-product/result. Throughout the life of the project, these should be tracked and managed via the risk register such as that found in the PM Essentials Project Toolkit. Starting to identify project risks early in the project helps in the planning process.*

|  |  |
| --- | --- |
| **#** | **Risks** |
| 1 |  |
| 2 | [add others as needed] |

## Project Team and Stakeholders

*Identify anticipated roles and responsibilities for the project team and stakeholders (include Subject Matter Experts (SMEs), Approvers, and Customers.)*

| # | Project Role | Name | Responsibility |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |
| 6 |  |  |  |

# Glossary

*Define all terms and acronyms required to interpret the Project Charter.*

| Term/Acronym | Definition |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Appendices

*Include any relevant appendices.*

# Revision History

Identify document changes.

| Version | Date | Name | Change Notes |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Note: An IT project is classified as “major” if it meets the definition of a major information resources project as specified in Texas Government Code, Section 2054.003(10). Major information resources projects must use the Texas Project Delivery Framework.

# Feedback

If you have any questions on PM Essentials or on project management practices, please contact DIR’s Project and Portfolio Management Office at [ppmo@dir.texas.gov](mailto:ppmo@dir.texas.gov).