

Charter Template Instructions

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The project charter should be filled out and approved as early as is practical in the project lifecycle. It is part of the initiation of the project, naming the project manager and giving him or her authority. Use this template as soon as the project idea is formulated, before planning begins. If the project has already been approved, whether orally or in writing, then fill out the template as soon as possible to capture the approved project in a consistent, complete format.

The Fields on the Form

Fill out every field on the template. Replace all text in brackets (“<...>”) with the appropriate information. When in doubt, consult with the prospective team members or sponsors. The entire document should be short (two- to three-pages) and business-oriented.

Project Name	<p>Describe the project as completely as possible, in as few words as possible. Avoid terms that would only be clear to the team members. Use language that people outside the project can understand. Select the name carefully; it will be used to refer to the project for the life of the effort.</p> <p>Put the name in the form header and in the left-hand column, in the first row of the table.</p>
Project Description	<p>Describe the essential elements of the project in a few paragraphs. Include information about the current situation and what will be different when the project is complete. Focus on the value of the changes to the organization.</p> <p>Put the description in the right-hand column, in the first row of the table.</p>
Objectives	<p>Create a bulleted list of the most critical objectives of the project. Do not simply repeat items from the description. List critical goals and final results.</p>
Size	<p>Choose a size category of small, medium, or large. If available, give executive-level information about the cost and impact to the organization.</p>
Criticality	<p>Choose a size category of low, medium, or high. Provide information about the urgency and the benefits of the project, to explain the selected rating. Consider the criticality based on the broadest view of the organization, not the narrow needs of a particular group.</p>

Customizing the Template

This template was designed for a specific company, and the fields on the template are designed to provide the key information that senior executives need to decide whether to proceed with a project or cancel it. Care was taken to define general-purpose criteria that would be useful for many years and many different types of projects, but the template may not meet the needs of all projects for all organizations.

Organizations should review the template and look at the criteria that their decision-makers use when determining whether to proceed with a project proposal or cancel it. Feel free to change the items in the template, remove them, or add new ones. These instructions should also be customized to reflect the needs of the organization.

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