

Project *Charter*

Formally authorizes the project, sets its objectives and boundaries, and gives the project manager authority to apply organizational resources.

USE WHEN	OWNER	APPROACH	TIER
After the business case is approved, before detailed planning starts	Project manager prepares · sponsor approves	ALL	Essential

HOW TO USE THIS TEMPLATE

1. Pull purpose, options, and rough cost from the business case (T05) or project request (T01).
2. Draft every section with the sponsor. Keep it high level: two to four pages once filled in.
3. Review it with key stakeholders so objectives, scope, and authority are agreed before signing.
4. Get the sponsor's signature. The project is not authorized until this is signed.
5. Delete guidance text (italic) before sharing. Store the signed copy with the project records.

Project name	
Project ID / client	
Prepared by	
Version · date	
Approved by	

1 Project purpose, vision, and justification

In three to five sentences, state the problem or opportunity, why it matters now, and the cost of doing nothing. Reference the business case. Test: someone outside the project understands why money is being spent.

Project vision: one or two sentences on the future state the project creates, written so the whole team can repeat it. Use it for every approach (PMBOK® Guide 7th Ed. lists the project vision statement as a strategy artifact). Test: it describes the result for the organization, not the work or the product's features.

PROJECT VISION

BUSINESS CASE OR REQUEST REFERENCE

2 Measurable objectives

List two to five objectives. Each should be SMART: specific, measurable, achievable, relevant, and time-bound. Test: every objective has a number and a date. "Improve intake" fails; "Cut intake time from 5 to 2 days by September 1" passes.

#	OBJECTIVE	MEASURE	TARGET	BY WHEN
1				
2				
3				
4				

3 High-level scope and exclusions

Describe scope at the outcome level in a few bullets. Exclusions matter as much: list anything a stakeholder might reasonably assume is included. Test: every exclusion is something someone could ask for later. Detailed scope comes in the scope statement (T21) or product backlog (T25).

IN SCOPE

OUT OF SCOPE

4 Key deliverables

A deliverable is any product, result, or capability the project must hand over. Name four to eight. Test: each is a noun someone can accept or reject.

#	DELIVERABLE	DESCRIPTION	ACCEPTED BY
1			
2			
3			
4			
5			

5 Summary milestones

A milestone is a significant point in the project with zero duration. List four to eight with target dates. At this stage dates are targets, not commitments. Test: each milestone has clear completion evidence. Track them in the milestone list (T29).

#	MILESTONE	TARGET DATE	COMPLETION EVIDENCE
1			
2			
3			
4			
5			
6			

6 Summary budget

Show the authorized amount and how it builds up. Contingency reserve covers identified risks and sits inside the cost baseline. Management reserve covers unforeseen work, sits outside the baseline, and is released by the sponsor. Test: the lines add up to the total authorized.

Estimated cost of work	
+ Contingency reserve	
= Cost baseline	
+ Management reserve	
= Total authorized budget	
Funding source · estimate accuracy	

7 Success criteria and sign-off

State what must be true to call the project a success and who decides. Cover project success (time, cost, scope) and outcome success (the objectives above). Test: each criterion can be checked with evidence.

#	SUCCESS CRITERION	HOW MEASURED	SIGNS OFF
1			
2			
3			
4			

8 High-level risks

List the three to five biggest uncertainties known today. Write each as cause, risk, and effect: "Because of X, Y may happen, which would cause Z." These seed the risk register (T43). Test: each could realistically happen and would matter.

#	RISK (CAUSE, RISK, EFFECT)	INITIAL RESPONSE IDEA
1		
2		
3		
4		

9 Assumptions and constraints

An assumption is something believed to be true without proof. A constraint is a fixed limit, such as a date, budget cap, regulation, or resource. Test: each assumption names who will confirm it and by when. Track both in the assumption and constraint log (T10).

ASSUMPTIONS

CONSTRAINTS

10 Key stakeholders

A stakeholder is anyone who affects or is affected by the project. Name the people and groups who fund, decide, deliver, or must change how they work. Full analysis goes in the stakeholder register (T11).

NAME OR GROUP	ROLE ON PROJECT	MAIN INTEREST OR CONCERN

11 Delivery approach

Predictive means scope, schedule, and cost are planned up front. Adaptive means work is delivered in short iterations and refined as you learn. Hybrid combines both. For hybrid, show which workstream runs which way and where they connect. Test: each workstream lead can tell how their work will run. See the approach selection worksheet (T08).

☐ Predictive ☐ Hybrid ☐ Adaptive

WORKSTREAM	APPROACH	CADENCE, KEY GATES, OR CONNECTION POINTS

12 Product vision and product owner ADAPTIVE / HYBRID ONLY

Delete this section for fully predictive projects. The product vision is one or two sentences on who the product serves, the need it meets, and how it beats today's way. It differs from the project vision in section 1, which describes the future state for the organization. The product owner is the one person who owns the backlog and sets priority. Test: one named person with real time for the role.

PRODUCT VISION STATEMENT

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Product owner (name, title)	
Time committed to the role	

13 Project manager and authority

Name the project manager and set clear limits so routine decisions don't wait for approval. Use amounts and boundaries, not "as needed." Test: a team member can tell whether the PM can approve a given request.

Project manager	
Budget authority	
Staffing authority	
Decision authority	
Escalates to · when	

14 Sponsor and approval

The sponsor provides funding and is accountable for the project's business result. Signing confirms the project is authorized and the PM may apply resources.

Sponsor (name, title)	
Other approvers, if any	

Sponsor signature · date

Project manager signature · date

Additional approver · date

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

Abridged. All names, figures, and dates are illustrative.

1 • Purpose. New-client onboarding runs on email and paper forms and takes an average of five business days. Creative briefs arrive incomplete, contracts go back and forth, and credit checks stall while account coordinators chase details. A secure online portal will capture complete briefs and signed agreements up front and route credit checks automatically. Source: Business Case v1.2.

Project vision. Every new Northfield client is ready to start work within two business days, through one secure process that studios and clients both trust.

2 • Objectives

OBJECTIVE	MEASURE	TARGET	BY WHEN
Faster onboarding	Business days, first contact to client set up	5 to 2 days	Sep 1, 2027
Online adoption	Share of new clients onboarded online	90%	Sep 1, 2027
Protect confidentiality	Confidentiality incidents	Zero	Through Dec 1, 2027

3 • In scope: client-facing onboarding portal; CRM and contracts system integration; migration of open onboarding records; training for account coordinators and studios.

Out of scope: billing system changes; mobile app; project delivery after onboarding; migration of past client records.

5 • Milestones (2027): Charter signed Jan 15 · Requirements baselined Feb 5 · Vendor contract signed Feb 12 · Security review passed Apr 9 · UAT complete May 21 · Go-live Jun 1 · Project closed Jul 9.

6 • Budget	Work \$173,000 + contingency \$12,000 = cost baseline \$185,000 · + management reserve \$15,000 = \$200,000 authorized
8 • Top risks	CRM and contracts system integration delays · staff resistance to the new process · vendor resource turnover · privacy findings in security review
11 • Approach	Hybrid. Contracts, privacy, security review, and data migration run predictively with gates. Portal interface runs in two-week sprints. Training and adoption are planned against go-live.
12 • Product owner	Marcus Reyes, Client Services Director. Product vision: onboarding that clients finish in one sitting and staff never retype.
13 • PM authority	Amy Price. May release contingency up to \$5,000 per item and assign work within workstreams. Scope changes and management reserve go to the sponsor.
14 • Sponsor	Dana Whitfield, CEO. Signed January 15, 2027.