The following document is a sample Word template for the creation of a project charter and or project plan, which will demonstrate how to approach any type of project and manage it effectively. The format is very basic and can be modified to meet the presentation level required.

Project Charter

A project charter allows management and the project team to better understand the costs, goals and boundaries before the project is approved and work commences. Once approved the charter gives formal authority to the project manager to carry out the work. Without a charter priorities get confused and unnecessary, out of scope, work is more likely to be undertaken, wasting resources.

How do I use this template?

Refer to the instructions under each heading. No need to be verbose as long as each section is dealt with. Do not delete headings if they are not applicable but instead enter N/A. It is not necessary to spend too much time writing a charter. Although the document can look daunting you should be able to complete it in less than 20 minutes when you are proficient.

Project Plan

A project plan allows management to be more certain that the expected costs are known and the quality of the work assured.

You may be directed, depending on the size of the project, to provide additional detail, expanding the charter out to a full project plan.

Add in the following sections to convert this charter template into a full project plan:

- Include a detailed activity list which can be extracted and updated and used to track status as the project progresses. Generally you will get this list from a brainstorm with the likely project team.

- Make the budget definitive instead of indicative (ranges from under by 5% to over by 10% instead of under by 25% or over by 75%)

- Add detail in most sections
    - Stakeholders section will indicate roles, impacts, knowledge and needs
    - Resources will detail the steering committee in a separate table
    - Risks will include mitigation strategy as well as what to do if the risk eventuates
    - The time line will include 'Stage Gates' (points at which the steering committee has to make a formal decision to proceed
    - The communications section usually has at least three levels of regular reporting 1. Project Team 2. Steering committee 3. Stakeholders

- Include a Requirements Analysis stage where the stakeholders are consulted and a report is produced outlining what is required from their point of view

- Include a 'Procedures and Policies required' section

- Include a Quality Management Plan section (mention use of stage gates, staff surveys, and redundancy planning)

- Include a section outlining how change requests will be handled formally

- Include a table of contents at the start

- On execution include:
    - Fortnightly steering committee meetings and reports
    - Regular stakeholder updates
    - Tracking progress against the task list.

Instructions are marked in italic red. Remove this before submission.

PROJECT CHARTER – <PROJECT NAME>

1. PROJECT DETAILS

Prepared By:	
Date Issued:	
Project Reference Number:	
Client Contact (if applicable):	

2.1 Revision History

Version	Date	Who	Description

Be sure to maintain a register of projects for your organisational unit. Allocate a unique project number for approved projects

2. BUSINESS OBJECTIVE

Describe the technical or business need for the project to be undertaken. Compare to the consequences of doing nothing and obvious alternatives. E.g. Office XP has been released and offers the following advantages. Speak in terms of added functionality of possible savings (The savings claim would generally imply that you have a stage in the charter timeline to develop and approve a business case). Do not describe what you will buy or do but what you are trying to achieve in broad high level terms. Include any significant business risks from the risk table below, including the risk of doing nothing.

3. DESCRIPTION OF APPROACH

A brief description of how the business objectives will be achieved in practical terms. Indicate what will and will not be done. Remember, if you get this in writing and get agreement from the client and management you won't waste your time designing/delivering something that is not what was actually required.

E.g We will trial an upgrade of five desktops to office XP and if successful upgrade the remaining work-stations over a period of 2 months in time to be completed before Christmas.

4. STAKEHOLDERS

List all the people/groups that will be impacted by this project and may need to have a say in the product design and implementation process. Do not list your organisational unit staff out individually but rather list the project steering committee (if applicable) as a single entry. Company staff relevant to the project can be listed in the Resourcing section. It is important not to forget to consult with a person/group that has a major say in the project. Who will use the product and who decides what it will be made up of? All stakeholders should sign the project charter before work proceeds.

Name	Role	Phone	Approval Signature
	Project Manager		
	Desktop Resource		
	Trainer		
	Client Contact		
	Project Owner (Initiator)		
	Documenter		
	etc		

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5. DELIVERABLES REQUIRED FOR SIGN-OFF AND HANDOVER

List off the basic components that you can identify that will need to be delivered. Generally deliverables are measurable tangible milestones in the project that can be signed off on when complete. E.g Tailored Office XP user guide, upgrade process documentation, XP training course. The project work cannot cease until these conditions are met.

Description	Responsibility	
	Ours	Client
- ????		
- Documentation		
- Training		
- User Guide		
-		

6. TIMELINE

List the expected stages and approximate timings. For Charters just list the main stages. For a project plan list all the activities. Where appropriate use Feasibility study Report, Pilot report, Business case, Project Plan development, Execution of project plan, Post project review. Allow dates for approval of the above.

Phase/Task	Time Estimate	Due Date

7. APPROXIMATE BUDGET

Charters only require indicative budgets and can be under by 25% or over by 75%. Project plans must have 'definative' budgets, ranging from under by 5% to over by 10%. If an indication of budget has been given by the client list it here. Be sure to include labor, hardware, software, documentation, training etc

Item	Cost
Internal Labor	
External Labor	
Hardware	
Software	
Training	
Documentation	

8. PROJECT RISKS

Be sure to list the risks here. For example: The project team is short of resources and if we do not make the deadline an entire department will be severely impacted. For smaller projects just list the risks and for larger projects rank the risks and rate their likelihood, impact and mitigation strategy to be adopted.

Risk Description	Likelihood	Impact	Mitigation Strategy
e.g. Technical Difficulty X	Medium	High	Monitor in steering reports. Assign staff from other teams if required.

9. PROJECT RESOURCING

List the team members and their responsibilities (esp. that will be responsible for the Analysis stage next). Record the number of hours expected for each resource over the duration of the project to help senior management assess impact and resourcing requirements

Name	Role	Phone	Hours/week
	Project Manager		
	Desktop Resource		
	Trainer		
	Client Contact		
Total Hours/week			

10. LIKELY TRAINING REQUIREMENTS

Define the training required for the project team members to be able to complete the work?

Course	Who attend	Approximate Cost

11. REPORTING/COMMUNICATIONS

For smaller projects discuss the project in weekly team meetings and report on status in normal team updates to management. If the project is of sufficient size list the people that the project manager will have to report to and how frequently. List what information should be reported.

For larger projects use the following:

Meeting/Report	Frequency	Content
Steering Committee Report and Meeting.	Fortnightly	General Status, Issue summary, Risk status, Progress, decisions to be made Timeline Report to be submitted the day before the meeting. Budget Vs Actual

Project Team & Minutes	Weekly	Minutes of project team meeting listing issues and what is being done about each one. The minutes to be distributed within a week of the meeting. Preferably the next day.
Client (Staff) & minutes	Weekly	Detailed issues list Tip and tricks Timeline The minutes to be distributed within a week of the meeting. Preferably the next day.

12. PROJECT DEPENDENCIES

List the projects that this project will be dependant on in order to be workable. Also list all projects that will be dependant on this one.

Project Name	Dependency

13. CONSTRAINTS

List any constraints that have been imposed by the client on the project

List work that will NOT be done because it is out of scope.

Eg. The solution must be compatible with Linux.

Must run the design past <XYZ> technology or <ABC> must be included in the pilot group.

The solution must be delivered before Christmas.

14. ASSUMPTIONS

List any assumptions that the project team is making in order to have a successful project E.g.

The client will be responsible for the installation and configuration of their own desktop operating systems.

That the departmental E-mail system upgrade that this project is dependent on will be completed before the project commencement date.

15. DEFINITIONS (IF REQUIRED)

<Term 1>:   <Explanation 1>

<Term 2>:   <Explanation 2>

<etc>   <...for terms not generally used, known or for which there is a special in-house meaning>

16. SUPPORTING DOCUMENTS

<Describe any templates in use and where they can be accessed>

<Describe any records kept, where they should be stored, and how long they should be retained>

<Describe any other documents which could assist in understanding or applying this procedure and where they can be accessed>

FILE	LOCATION	DESCRIPTION
Template – Basic Procedure 1	AAA Guidelines and Templates	A standard template which can be used to develop policies, procedures etc

17. REVISION HISTORY

VERSION	DATE	EDITOR	SUMMARY OF CHANGES
No 1	dd.mm.yy	<Your name>	Initial version

18. PROJECT COMMENCEMENT SIGN-OFF

The author of this document may like to recommend the next course of action using ticked boxes. The authorising staff member can then indicate what course of action they would like to occur as a condition of their signing the document. The project manager can then indicate which courses of action have actually taken place as a way of tracking progress.

Project Components	Recommendation from author	Instruction from authoriser	Project Manager Progress Checklist
Charter		☑	☐
NEXT COURSE OF ACTION:			
Write a Business Case **-** to confirm it will be worth the expense	☐	☑	☐
Write a Feasibility study plan - to verify that the technology works	☐	☐	☐
Write a Pilot plan - to verify that the concept works on actual users	☐	☐	☐
Complete a detailed project plan - to obtain more accurate cost, time, risk etc estimates	☐	☐	☐
Execute project	☐	☐	☐
Reject project	☐	☐	☐
Place project on Hold	☐	☐	☐
IF EXECUTION APPROVED:			
Deliverables sign-off - agreement from client that project is complete and can go operational		☑	☐
Post Project Review - high level evaluation of success of project from all points of view		☑	☐

Declaration:

I the undersigned project sponsor/client have read and understand the contents presented in this project charter and agree that we should proceed based on my instruction above.

Project Sponsor Name:

Project Sponsor Title:

Project Sponsor signature: _____ **Dated:** _____

19. PROJECT COMPLETE SIGN-OFF

I the undersigned project sponsor/client hereby agree that the deliverables of this project have been completed and that the project can be handed over top operational responsibility. The signatory must be the external client or if one does not exist, it will be the sponsor.

Sign-off:

Project Sponsor Name:

Project Sponsor Title:

Project Sponsor signature: _____ **Dated:** _____