\<PROJECT NAME\>

PROJECT CHARTER

Version *\<1.0\>*

\<mm/dd/yyyy\>

AGENCY:_____

CONTACT:_____

VERSION HISTORY

*[Provide information on how the development and distribution of the **Project Charter** was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]*

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	*<Author name>*	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	*<reason>*

Note to the Author

This template has been provided by the Georgia Technology Authority Enterprise Portfolio Management Office. Questions should be directed to epmo@gta.ga.gov

*[This document is a template of a **Project Charter** document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.*

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template for your project document, it is recommended that you follow these steps:

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):*

    a. *Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.*

    b. *Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.*

    c. *After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.*

2. *Modify boilerplate text as appropriate to the specific project.*

3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*

4. *To update the Table of Contents, right-click and select "Update field" and choose the option- "Update entire table"*

5. *Before submission of the first draft of this document, delete this "Notes to the Author" page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*

TABLE OF CONTENTS

1   **Executive Summary** *(for smaller projects this is optional)*

[The executive summary should be a high-level summary of what issues or problems the project was created to correct. Typically, the executive summary also provides the background information and general statements regarding the project's purpose or justification which will be covered in more detail in the appropriate section(s) of the charter.]

2   Project Purpose/Justification

[This section describes the purpose and justification of the project in the form of business case and objectives. The business case should provide the reasoning behind the need for this project as it relates to a function of the business.]

2.1.   Business Need/Case

[Discuss the logic for the Business Need/Case (market demand, organizational need, customer request, technological advance, legal requirement, ecological impacts, social need, etc). This section should also include the intended effects of the business case (i.e. cost savings, process improvement, new product development, etc).]

2.2.   Business Objectives

[This section should list the Business Objectives for the project which should support the organizational strategic plan.]

3   Project Description

[This section provides a high-level description of the project. This description should not contain too much detail but should provide general information about what the project is, how it will be done, and what it is intended to accomplish. As the project moves forward the details will be developed, but for the project charter, high-level information is what should be provided.]

3.1.   Project Objectives and Success Criteria

[Objectives should be SMART: Specific, Measurable, Attainable, Realistic, and Time-bound. The project manager must be able to track these objectives in order to determine if the project is on the path to success. Vague, confusing, and unrealistic objectives make it difficult to measure progress and success.]

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3.2. Requirements

[The project team should develop a list of all high-level project requirements. These requirements are clear guidelines within which the project must conform and may be a result of input from the project sponsor, customer, stakeholders, or the project team.]

3.3. Constraints

[Constraints are restrictions or limitations that the project manager must deal with pertaining to people, money, time, or equipment. It is the project manager's role to balance these constraints with available resources in order to ensure project success.]

3.4. Assumptions

[The project team must identify the assumptions they will be working under as the project goes forward. These assumptions are what the project manager / team expect to have or be made available without anyone specifically stating so.]

3.5. Preliminary Scope Statement

[The preliminary scope statement is a general paragraph which highlights what the project will include any high-level resource or requirement descriptions, and what will constitute completion of the project. This preliminary scope statement is exactly that: preliminary. All of this information will be expanded upon in greater detail as the project moves forward and undergoes progressive elaboration.]

4 Project Organization

4.1. Roles and Responsibilities

[This section describes the key roles supporting the project. Add others, as required]

Name & Organization	Project Role	Project Responsibilities
Name	*Executive Sponsor*	*[Approves project funding, and monitors the project progress at agency level.]*
Name	*Business Owner*	*[Provides direction and support to the team. Approves the request for funding, approves the project scope represented in this document, and*

Name & Organization	Project Role	Project Responsibilities
		sets the priority of the project relative to other efforts in SBWC.]
Name	*Contracting Officer*	*[Has the authority to enter into, terminate, or change a contractual agreement on behalf of the agency. Bears the legal responsibility for procurement contracts entered into for purchasing products or services as part of project effort.]*
Name	*Program Manager*	*[Authorizes expenses for the hardware, software and time sheets. Participates in key decisions such as hiring and separation of team members, technology choices, and helps the team in issue resolution.]*
Name	*Business SME*	*[Business subject matter expert on process improvement and customer service operations. Acts as a guide to develop broad level scope on the entire system.]*
Name	*Project Manager*	*[Performs the day-to-day management of the project and has accountability to manage the effort within the constraints of scope, quality, time and cost, and ensure customer satisfaction.]*
Name	*Performance Critical Partner*	*[Member of the integrated project team in management who is responsible for the project's overall performance. This person must ensure that the investment is accomplishing the business objectives and meeting business needs.]*
Name	*Acquisition Critical Partner*	*[Member of the integrated project team responsible for representing acquisition interests and ensuring that the project is in compliance with*

Name & Organization	Project Role	Project Responsibilities
		GTA acquisition policy, procedures, and requirements.]
Name	*Security Critical Partner*	*[Member of the integrated project team responsible for representing information security interests and ensuring that the project is in compliance with GTA information security policy, procedures, and requirements.]*
Name	*Budget Critical Partner*	*[Member of the integrated project team that is responsible for determining if there are adequate financial resources available.]*
Name	*Human Resources Critical Partner*	*[Member of the integrated project team responsible for representing Human Resources interests and ensuring that the investment is incompliance with Human Resource policy, procedures, and requirements.]*

4.2. Stakeholders (Internal and External)

Name & Organization	Project Interest or Role
Name	
Name	

5 Risks

[All projects have some form of risk attached. This section should provide a list of high-level risks that the project team has determined apply to this project.]

6 Project Deliverables

[This section should list all of the deliverables that the customer, project sponsor, or stakeholders require upon the successful completion of the project. Every effort must be made to ensure this list includes all deliverables and project sponsor approval must be required for adding additional deliverables in order to avoid scope creep.]

7 Summary Milestone Schedule

[This section provides an estimated schedule of all high-level project milestones. It is understood that this is an estimate and will surely change as the project moves forward and the tasks and milestones and their associated requirements are more clearly defined.]

8 Summary Budget

[The summary budget should contain general cost components and their planned costs. As the project moves forward these costs may change as all tasks and requirements become clearer. Any changes must be communicated by the project manager.]

9 Project Approval Requirements *(for smaller projects this is optional)*

[The organization must understand when the project has reached a successful completion. These criteria must be clear and should be accepted by whoever will sign-off on the project's closeout. Once signed-off by the authorized person, the project is deemed approved and is successful as long as it has met all of the agreed upon requirements.]

10 Project Manager

[This section explicitly states who is assigned as the PM, their responsibility, and authority level. Depending on the organization and scope of the project, the project manager may have varying levels of responsibility and authority for personnel, project expenditures, and scheduling.]

11 Approvals

The undersigned acknowledge they have reviewed the project charter and authorize and fund the <investment name> project. The undersigned herby give the project manager the authority to apply the approved level of organizational resources to project activities. Changes to this project charter will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Sponsor and Project Manager. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

Signature: _____ Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____ Date: _____

Print Name: _____

Title: _____

Role: _____