Project Charter

TEMPLATE

[Date of first signature]

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[Note to author: A well-written charter establishes a clear, concise, and compelling vision for a new project that your organization and one or more project partners share. The charter outlines, in a mutually agreed upon way, how your organization and any project partners will work together to produce any stated outcomes and deliverables using specified methods. To be concise and expedite reaching consensus, charters should include only aspects of the project to which the partners and signatories believe important to agree and adhere. Project participants rarely update a charter as a project evolves, so be aware that the more detail you add to it, the greater the risk that it will not resemble the actual project as implemented.

Creating a project charter stimulates thorough discussion and decision making with project partners. For this reason, the process *of creating the charter offers perhaps more value than the resulting charter document or signatures. This template provides guidance for creating a charter by providing the standard sections a charter typically addresses, and within those sections, posing the questions your organization and external project partners must consider, discuss and arrive at mutually agreed upon answers.*

Signatures

The signatories below approve this project charter, approve initiation of the project, and agree to adhere to and support the project as outlined in the charter.

_____   _____   _____
Name   *Organization*   *Date*

_____   _____   _____
Name   *Organization*   *Date*

_____   _____   _____
Name   *Organization*   *Date*

Note to author: Not every project requires a signed charter. Determining the need requires you to answer the key question: In no uncertain terms, before starting this project *do we need to know whether we are in agreement with external partners that will be part of project governance and decision-making on the project goal and deliverables? Such external partners may or may not include the funder.*

Project Purpose

- *What is the intent of this project, including what will be different and better as a result of it?*
- *[Note to author: The project purpose should be described in only one or two sentences. Think of it as the "elevator speech."]*

Project Value

- *Why are the project partners undertaking this project? Why is it important? Why is this the right time for this project?*
- *What is the strategic value of the project to the public health agency? To any community partners?*

Project Overview

- *What historical or other information must one know to understand the genesis, purpose, intended contributions and impact of this project? To what other initiatives will it add or contribute.*
- *Who is funding the project? What are their expectations?*
- *What is the duration of the project?*

Project Goal

- *What is the intended outcome and impact of this project?*
- *[Note to author: The project goal should answer the questions: What will stakeholders do with any deliverables or outcomes, and how will they benefit from them? Given that project deliverables and outcomes probably won't happen before the project concludes, goals should have a longer horizon than project timelines. Keep in mind, too, that the project may not be the only activity that contributes to achieving that goal.]*
- *[Note to author: Although the project goal does not have to be measurable, it should be fairly concrete and uniformly interpreted by all partners.]*
- *[Note to author: A project may have more than one goal; for example, a project may consist of two or more sub-projects with distinct intended outcomes. Ideally, however, the project charter should describe a single project goal.]*

Project Objectives

- *What incremental, achievable (within the project timeline), observable and measurable actions will provide the means for attaining the goal?*
- *[Note to author: Objectives can be outcomes objectives that address the results to be obtained, or process objectives that address the means to get to the outcome objectives. Preferably state your outcomes objectives using the SMART approach*

- *[Note to author: An objective may sometimes sound like a deliverable because the deliverable may be the physical result of the activities required to achieve the objective. For example, an objective around defining system requirements can refer to both the process and end results of collective thinking, as well as the physical requirements document used to disseminate the results.]*

Activities and Milestones

- *What are the key activities, or process objectives, for achieving the outcome objectives?*
- *What are the major milestones for assessing progress in terms of deliverables (products) and timeframe?*

Major Deliverables

- *What products or other artifacts should result from this project? How will they be used?*

Project Scope

- *What essential activities or processes must this project conduct, and what content must it create, to achieve the project goal and objectives?*
- *What activities, intended outcomes or deliverables will* not *be part of this project because they would expand the project in ways that might jeopardize one or more of the stated objectives, timelines, or budget?*
- *[Note to author: Identifying what is* not *in scope is often more important than identifying what is in scope.]*

Assumptions

- *What assumptions do your organization and any external partners make and consider a given at the beginning of the project. For example, all the partners agree to work together and agree with the project purpose and goal?*

Risk Mitigation

- *What events or other factors could undermine the project and prevent it from achieving the desired outcomes in the timeframe specified?*

- *[Note to author: In the table below, describe each risk; rate the impact of the risk if realized and the likelihood that it will be realized [High (H), Medium (M) or Low (L)]; and describe possible risk mitigation measures.]*

Table 2: Identified Risks and Mitigation Plans

Risk Description	Impact if Realized (H, M, L)	Probability of Realization (H, M, L)	Mitigation Efforts

Partner Roles and Stakeholders

- *Who are the partners and what project contributor roles do they fulfill?*
- *Who are other project stakeholders and what roles do they fulfill during their project, helping disseminate its products, or both?*

Roles and Responsibilities

Role	Role Description	Name/ Organization

Governance and Decision-making

- *What will the project organizational structure look like? Include a graphic if appropriate.*
- *How will project decisions get made? How will differences of opinion be handled?*
- *Does one partner have final decision-making authority?*
- *What lines of accountability exist within the project team? With the funder or funders?*
- *[Note to author: The answers to these questions often get revealed during the process of creating the charter, so observe how conversations and negotiations occur with project partners during this process.]*

Project Communications

- *How will communication occur among the partners?*

- *What level of interest and influence does each stakeholder have? Which stakeholders are most important from a communications perspective? For what purpose and when?*
- *[Note to author: Ideally you will conduct the stakeholder analysis with project partners.]*