[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Project Charter

The formal authorisation for a project: what it must achieve, what it covers, who runs it, and the authority, budget and dates the sponsor approves. **Project:** _____ **Document:** _____

Prepared by: _____ Project manager: _____

Sponsor: _____ Date of this document: _____

Version: _____ Charter reference: _____

1. Purpose and background Background. [Background to this project: the problem or opportunity it addresses and why action is needed now] **2. Objectives and success criteria** Each objective states what will be achieved, how it will be measured, the target to be reached, and the date by which it will be reached. A project is judged a success against these criteria, not against activity completed. **Purpose.** [Statement of the purpose of this project in one or two sentences] **Business benefit.** [Benefit the organisation expects from this project and how that benefit will be recognised]

Objective	Measure	Target	Date to be reached
[Objective]	[How achievement will be measured]	[Target to be reached]	[Date by which the target will be reached]
[Objective]	[How achievement will be measured]	[Target to be reached]	[Date by which the target will be reached]
[Objective]	[How achievement will be measured]	[Target to be reached]	[Date by which the target will be reached]

3. Scope: 3.1 In scope [Area of work included in this project] [Area of work included in this project] [Area of work included in this project] 3.2 Out of scope [Area of work explicitly excluded from this project] [Area of work explicitly excluded from this project] Work outside the scope above is not part of this project. It is added only through the change control process agreed in section 8. 4. Deliverables and acceptance:

Deliverable	Description	Acceptance criteria	Accepted by
[Deliverable]	[Description of the deliverable]	[Criteria that must be met for acceptance]	[Name and role of the person who accepts this deliverable]
[Deliverable]	[Description of the deliverable]	[Criteria that must be met for acceptance]	[Name and role of the person who accepts this deliverable]
[Deliverable]	[Description of the deliverable]	[Criteria that must be met for acceptance]	[Name and role of the person who accepts this deliverable]

Milestone	Planned date	What completion means
[Milestone]	[Planned date of this milestone]	[Evidence that this milestone is complete]
[Milestone]	[Planned date of this milestone]	[Evidence that this milestone is complete]
[Milestone]	[Planned date of this milestone]	[Evidence that this milestone is complete]

5. Milestones and dates: Planned start date: [Planned start date of the project] Planned completion date: [Planned completion date of the project]

Cost category	Approved amount	Notes
[Cost category]	[Approved amount for this cost category]	[Notes on this cost category]
[Cost category]	[Approved amount for this cost category]	[Notes on this cost category]
[Cost category]	[Approved amount for this cost category]	[Notes on this cost category]

6. Budget summary: Total approved budget: [Total approved budget for the project] Contingency held within the total: [Contingency amount held within the total approved budget, or none] How funds are released: [How project funds are released, and any approval needed before each release] 7. Stakeholders and organisation:

Stakeholder or role	Interest in the project	Responsibility
[Name and role of the stakeholder]	[Interest of this stakeholder in the project]	[Responsibility of this stakeholder]
[Name and role of the stakeholder]	[Interest of this stakeholder in the project]	[Responsibility of this stakeholder]
[Name and role of the stakeholder]	[Interest of this stakeholder in the project]	[Responsibility of this stakeholder]

8. Authority and governance Project manager authority. [Decisions the project manager may take without further approval] **9. Risks, assumptions and constraints: 9.1 High-level risks Tolerances.** [Tolerances on time, cost and scope within which the project manager may act, and what must be escalated] **Escalation route.** [Route for decisions beyond the project manager's authority, and the timescale for a decision] **Governance meetings and reports.** [Meetings and reports that keep this project under control, and how often each takes place] **Change control.** [How changes to scope, dates or budget are requested, assessed and approved]

[Company name]

Risk	Effect if it occurs	Initial response
[Description of the risk]	[Effect on the project if this risk occurs]	[Initial response to this risk]
[Description of the risk]	[Effect on the project if this risk occurs]	[Initial response to this risk]

9.2 Assumptions [Assumption this project relies on] [Assumption this project relies on]

9.3 Constraints [Constraint limiting this project] **10. Approval and authorisation** By signing, the sponsor approves this charter, appoints the project manager named in the document control table, and authorises the project to proceed within the budget, dates and tolerances stated above. [Constraint limiting this project]

Sign-off	Name	Role	Date
Sponsor	[Full name of the signatory]	[Role of the signatory]	[Date of signing]
Project manager	[Full name of the signatory]	[Role of the signatory]	[Date of signing]