**Project Charter Template**

*Month 20YY*

*Version X.XX*

|  |  |
| --- | --- |
| **Project Name:** |  |
| **Executive Sponsors:** |  |
| **Department Sponsor:** |  |
| **Impact of project:** |  |

*Company Information*

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# Executive Summary

*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.*

[Example] Poor (IT) security measures have led to numerous incidents, including data breaches, which have resulted in approximately $10 million in damages to the company. The Secure Access Management (SAM) project will address and correct these security issues and prevent further loss due to external IT security breaches. The project will enhance the current platform with new integrated tools that establish and maintain a robust security infrastructure.

# Project Purpose/Justification

*[Provide the overall purpose of the project with the business justifications that describe the need in detail.]*

## Business Case

*[Detail the factors that create the need for the project. These could include market demand, organizational need (such as improvements to productivity or streamlined systems), customer request, technology upgrades, legal requirements, environmental or social trends, etc.). Include the anticipated effects of the project (i.e. cost savings, greater market share, process improvement, improved time to market, etc).*

## Business Objectives

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

[Example] The business objectives for this project directly support our corporate strategic plan to improve IT security and reduce costs associated with loss and waste.

* Design and test a new IT security infrastructure within the next 120 days
* Implement the new IT infrastructure within the next 180 days
* Reduce damages from data breaches by $5M over 12 months.

# Project Description

*Describe the project at a high-level, with general information on what the project is, how it will be implemented and anticipated benefits. Other project deliverables will provide the level detail required to successfully implement.]*

[Example] The SAM project will upgrade our technology platform and integrate key security and access management and monitoring tools to ensure a stable infrastructure with robust security that prevents and detects intrusions. This will reduce operational risk, and lower costs associated with IT maintenance.

## Project Objectives and Success Criteria

*[Detail the specific objectives that define the success criteria for the project, ensuring that they are specific, measurable, attainable, realistic and time-bound, and that they align with the strategic objectives listed in section 2.2. These should be succinct and well-socialized with the project team].*

[Example]To successfully implement the SAM project, the following objectives must be met within the designated time and budget allocations:

* Develop and present the security solution methodology to senior leadership within the next 21 days.
* Complete list of required hardware/software which meets budget allocation within the next 25 days.
* Create prototypes of the key components of the solution for testing using the purchased hw/sw within the next 75 days.
* Simulate a solution which prevents security breaches and complete testing within the next 100 days.
* Implement the solution across the organization within the next 180 days.

## Requirements

*[List the high-level project requirements that will guide development and implementation of the project. These should be succinct and reflect input from all project stakeholders (sponsor, customer, team members, and other stakeholders). Specific business and technical requirements should be defined as the project moves forward, and published in separate deliverables.]*

[Example]This project must meet the following list of requirements in order to achieve success:

* The solution must follow all formal testing (Dev, QA and Staging environments) and change management requirements prior to deployment.
* Solution must be implemented minimal disruption to operations.

## Constraints

*[Detail the restrictions or limitations that will impact implementation of the project, with regard to people, money, time, or equipment.]*

[Example] The following constraints pertain to the SAM project:

* All enhancements to IT platforms must be made on existing hardware (no general infrastructure HW purchases are budgeted)
* All security hardware and software must be purchased in accordance with the allocated budget and timeline.
* Project team will include two security specialists, two implementation engineers, and one QA/business analysts.

## Assumptions

*[List the assumptions the project team will be working under. This includes resources and processes that should not need to be expressly requested during the project, such as governing policies and procedures.]*

[Example] Upon agreement and signature of this document, all parties acknowledge that these assumptions are true and correct:

* This project has the full support of the project sponsor, stakeholders, and all departments
* The purpose, impacts and requirements of this project will be communicated using accepted organizational change management practices, throughout the company prior to deployment
* The hardware/software solution will be housed in the IT department’s central facility in Anytown, USA.

## Preliminary Scope Statement

*[Describe what the project will include, with high-level resource or requirement descriptions. Then describe what kind of efforts fall outside of the project. Other project documentation deliverables should provide further details that fine-tune the scope for project team and stakeholders.]*

[Example] The SAM project includes the design, testing, and delivery of an improved security solution throughout the enterprise that can monitor, detect, and prevent unauthorized access and other intrusions.. All personnel, hardware, and software resources will be managed by the project team. All project work will be independent of daily and ongoing operations and all required testing will be done in the IT laboratory. All project funding (up to and including the amounts listed in this document) will be managed by the project manager. Any additional funding requires approval from the project sponsor. This project will conclude after successful final testing, enterprise-wide deployment, completion of technical and support documentation, and submission of the closure report to senior management.

# Risks

*[Describe the risks associated with project implementation, including financial, reputational, operational, and regulatory/compliance risks. Additional project deliverables should include a plan for risk mitigation, but you may want to include a high-level description of mitigation tools here as well.] All projects have some form of risk attached.]*

# 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. The list should not be amended without approval of the project sponsor.]*

[Example]The following deliverables must be met upon the successful completion of the SAM project. Any changes to these deliverables must be approved by the project sponsor.

* Fully deployed security access management solution
* Technical and support documentation for the solution
* Recommendation list for future security considerations

# Summary Milestone Schedule

*[Provide an estimated schedule of all high-level project milestones. Keep in mind that the schedule will change change as the project moves forward and the tasks and milestones and their associated requirements are more clearly defined.]*

|  |  |
| --- | --- |
| **Summary Milestone Schedule** (Key project milestones are relative to project start). | |
| **Project Milestone** | **Target Date (mm/dd/yyyy)** |
| Project Start | 01/01/20xx |
| Complete Solution Design | 01/21/20xx |
| Acquire Hardware and Software | 01/26/20xx |
| Complete Solution Simulation with New Hardware/Software | 03/01/20xx |
| Complete Solution Simulation and Testing | 04/01/20xx |
| Deploy Solution | 05/01/20xx |
| Project Complete | 05/15/20xx |

# Summary Budget

*[Include general cost components and their estimated costs. As the project moves forward these costs may change as all tasks and requirements become clearer.]*

The following summary budget is based on the planned cost components and estimated costs required for successful completion of the project.

|  |  |
| --- | --- |
| **Summary Budget** | |
| **Project Component** | **Component Cost** |
| Personnel Resources | $##,###.## |
| Hardware | $##,###.## |
| Software and Licensing | $##,###.## |
| Dev and QA Testing Preparation | $##,###.## |
| Training | $##,###.## |
| **Total** | **$##,###.##** |

# Key Personnel

| **Project Team** | | | | |
| --- | --- | --- | --- | --- |
| **Member** | **Name** | **Department** | **Telephone** | **E-mail** |
| **Project Manager:** |  |  |  |  |
| **Technical Lead** |  |  |  |  |
| **Business Lead** |  |  |  |  |
| **Specialist** |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Project Manager

*[Provide explicit information on who is assigned as the PM, their responsibility, and authority level.]*

[Example] John Doe serves as Project Manager for the duration of the SAM Project. Mr. will manage all SAM project tasks, scheduling, and communications efforts. His team, consisting of two IT specialists and one security specialist will be matrix support from the IT department. Mr. Doe will coordinate all resource requirements through the IT staffing partner, Jane Snow. Mr. Doe is authorized to approve all budget expenditures up to, and including, the allocated budget amounts. Any additional funding must be requested through the Project Sponsor, Matthew Moneybags. Mr. Doe will provide weekly updates to the Project Sponsor.

# Authorization/Approvals

|  | **Name** | **Signature** | **Date (MM/DD/YYYY)** |
| --- | --- | --- | --- |
| **Executive Sponsor** |  |  |  |
| **Department Sponsor** |  |  |  |
| **Project Manager** |  |  |  |