[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.

Item	Detail
Project	[Project name]
Document	[Title of this document]
Prepared by	[Name and role of the person who prepared this document]
Project manager	[Name and role of the project manager]
Sponsor	[Name and role of the project sponsor]
Date of this document	[Date of this document]
Version	[Version number of this document]
Charter reference	[Charter reference number]

1. Purpose and background

Background. [Background to this project: the problem or opportunity it addresses and why action is needed now]

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]

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.

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]

5. Milestones and dates

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]

Planned start date: [Planned start date of the project]

Planned completion date: [Planned completion date of the project]

6. Budget summary

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]

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]

[Company name]

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]

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]

9. Risks, assumptions and constraints

9.1 High-level risks

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]
- [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.

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]