SET UP TOOL: A PROJECT CHARTER OR CONCEPT PAPER

Definition:

A charter or concept paper is very much like a contract between senior administrators and the project team. In most organizations, this document is drafted by the Project Sponsor who then uses it to gain support for the project.

It is essential that the concept always be studied and approved by administrators. Major responsibility lies with the sponsor to negotiate agreement to the concept from inside the organization before going to the team, other departments, and outside partners.

This charter needs to be completed before the first team meeting.

Helpful Hints:

• Gather input from key stakeholders to clarify the project’s requirements and constraints before presenting a charter to senior leaders.

• Determine the driving forces behind the project. Understand how it impacts the organization’s or work area’s big picture.

• Set realistic expectations for deliverables and outcomes that are in line with the constraints on available time, talent, and materials.

• Agree with seniors that the charter is not a static document. Often the project team’s situational analysis will reveal previously hidden issues that can require a change in the project’s scope.
PROJECT CHARTER

1. What is the business or strategic “call to action” for this effort?

What difference does it make to the company if this succeeds or fails? Why is this project important to corporate strategy? Rock bottom - why are we doing this?

2. What are the required products/deliverables?

Outcomes are expected end products - what we will have at the end. May have multiple products or sub-products.

3. Who are the key stakeholders? (Name and Title of Key Individuals or Group Profile)

Who are the people who stand to gain or lose based on the success or failure of this project? Can include internal and external customers, vendors, other departments, etc.

4. What is the scope of the essential work to be done? What question(s) or issues should be addressed?

Be clear. Do not make this broader in scope than is intended.

5. What are the constraints or boundaries for the team? (Attach a not-to-exceed resource plan.)

May include budget, existing action plans to reference, use of consultants, policy limitations, participant selection, methods of operation, organizational mandates, etc.
PROJECT CHARTER

6. What are the anticipated barriers to success?

   *If this project failed, what might the obstacles be? These are not people, but could be behavior patterns, fixed beliefs, or false conceptions.*

7. What are the milestones for the project?

   *Includes targets for completion of phases, interim checkpoints, and interface routine reporting schedules.*

8. Who are the decision makers who will meet with the team at milestones to approve next steps?

   *These may change after each phase of the project. Be specific.*

9. Who are the team leaders and what is each expected to contribute? Leader? Documenter? Input facilitator?

   *The team composition may change in each phase. List names, department, title.*

10. Who is the project sponsor?

Signatures:

Senior Leader ___________________________ Date _________
Sponsor ___________________________ Date _________
Team Leader ___________________________ Date _________
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Senior Leader _______________________________ Date __________
Sponsor _______________________________ Date __________
Team Leader _______________________________ Date __________
YOUR ORGANIZATION’S CHARTERING AND PROJECT GOVERNANCE PRACTICES

Normally we:

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Ways to improve our Chartering and Project Governance Practices:

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Assignments for Action:

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A Project Charter or Concept Paper.doc