OE PROJECT CHARTER INSTRUCTIONS

PROJECT CHARTER

The Project Charter is a written agreement between the sponsor and the project team describing:

- The business objectives of the project,
- The resources the sponsor promises to provide for the project,
- What the project team will deliver to the sponsor by the end of the project,
- The project team members and key project stakeholders,
- The project roles and responsibilities, and
- The high-level project risks.

DEVELOPING A PROJECT CHARTER AT UC BERKELEY

In some organizations, the sponsor writes the charter. At UC Berkeley, the project manager typically writes the charter after interviewing the project sponsor and other key stakeholders.

The project formally begins when the sponsor signs off on the charter, approving the charter content and committing specific resources (e.g., funding, staff, equipment) to the project.

The process of interviewing and creating a charter helps the project manager and project team gather the most important initial project information as well as help establish scope boundaries.

The project charter, once approved, should provide a clear and concise summary of the project for the benefit of the sponsor, project manager, project team members, and other stakeholders. Stakeholders that join the project after the project has started also benefit from first reading the project charter.

During the execution of the project, changes to the scope are documented and a new revision of the Charter is approved. A change management form helps with the change conversation, and is attached to the charter as an addendum.

The Project Charter template contains notes to help with understanding what is requested for each section. Additional hints and suggestions for completing the charter sections are described in this guide.

PROJECT SCOPE CHANGES

Any tasks, requests, or additions to this project not indicated in the scope statement are considered "out-of-scope" for the current project. When a Project Scope change is required, change requests are clearly defined (including an impact analysis of cost, resource, and schedule implications), justified, and formally approved by the Project Sponsor(s). It is expected that stakeholders who initiate a change request will work collaboratively with the Project Manager to document and communicate the proposed change to key stakeholders. Proposed changes will then be brought to the attention of the Project Sponsors who will review and decide on how to proceed with the request.

Ultimately, changes to scope require the approval of the Project Sponsors.

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FILLING OUT THE CHARTER

PROJECT NAME
Enter the proper name used to identify this project.

PREPARED BY
Enter the name of the person writing the charter; typically the project manager.

DATE
Enter the date the charter was last modified.

PROJECT CHARTER VERSION HISTORY TABLE
Enter the version, date and comments of each version throughout the development of the Charter.

REVIEW & APPROVAL
Have the project team members and key stakeholders (including the sponsor and customer) review the draft of the charter for completeness and accuracy.

CASE FOR CHANGE
Describe the current situation that necessitates a project.

PURPOSE
Describe what problem will be solved by the project? Describe what value this project adds to the organization. Describe how this project aligns with the strategic priorities of the organization. Describe what benefits are to be expected once the project is completed.

RESULTS
Describe what success looks like. Describe how the Sponsor will know that the project is complete including success metrics. For example – "overall cost savings of $50K," or "reduce processing time by 25 percent."   To measure the targets, there must be a baseline set at the beginning of the project. In the first example, the total costs must be known at the beginning of the project so that a comparison can be made and the total savings can be calculated. The same is true for the second example where the total processing time at the beginning of the project must be identified so that a comparison can be made at the conclusion of the project and the difference measured. Another option is to give an absolute value, e.g. "reduce end-to-end processing time to 2 weeks."

SCOPE
The scope defines the boundaries in terms of where the project begins and ends. The scope describes what will be delivered; where, when, and how. It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery.

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