

# PROJECT CHARTER GUIDANCE

## Download the Project Charter template.

- Go to <https://epmo.sdcoe.net>
- Scroll down to **Resources > Project Charter**. Download the Project Charter template. It is a Word document.

### RESOURCES

Intro **Project Charter** Project Plan Status Meetings and Reports Execution and Launch Closure  
Soft Skills PM Toolkit More Resources



EXAMPLE: Project Charter [PDF]

TEMPLATE: Project Charter [DOCX]

**DOWNLOAD THE WORD TEMPLATE HERE**

**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**

Project Name X	Start Date XX/XX/XX	End Date XX/XX/XX
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**II. Project Organization**  
Indicate all project team members and how frequently you will communicate with them.

<p><b>Project Manager</b> Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</p> <p>• X</p>	<p><b>Sponsor</b> The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</p> <p>• X</p>
<p><b>Steering Committee</b> Key people that assist the project manager in making decisions and moving the project forward</p> <p>• X</p>	<p><b>Stakeholders</b> An individual, group, or organization that may affect or be affected by outcome of the project</p> <p>• X</p>
<p><b>Project Team</b> Supports the project manager in performing work of the project to achieve its objectives</p> <p>• X</p>	<p><b>Others Involved</b> List anyone else who will be involved and state their roles</p> <p>• X</p>

**III. Project Details**

**Project Description**  
Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?  
X

**Scope**  
What/how many this will impact? What is included (or not included) that can help manage the expectations?  
In scope:  
• X  
Out of scope:  
• X

**Deliverables**  
Which products or results do you expect upon completion of the project?  
• X

SDCOE Integrated Technology Services (ITS) Project Charter | 1

### Feel free to make the template your own.

- Remove the **SDCOE logo** and replace it with your own
- Remove the **SDCOE footer** and replace it with your own
- For any parts of the template that are SDCOE-specific, remove/edit them

### Tips:

- Prepare your project charter before the project work begins – this is your planning document
- Involve as many people as you can in the process of creating your charter
- It might take several working sessions to prepare the project charter.
- View a short tutorial: [Project Charter Tips](#)

# How to Prepare a Project Charter

## Part I: Project Name

- Write the official name of the project, the start date, and end date. Remember, what makes a project a project is that it has a start and *end* date!
- You might not know the end date when you first start writing your project charter. If necessary, leave it blank until you work through Part IV: Project Schedule & Milestones.
- Establish a realistic timeframe.

## Part II: Project Organization

- If you look at the top of each box there is a short description of each role.
- List *anyone* who will be involved in the project. Are there departments outside of yours to consider? School staff? External/vendors?

## Part III: Project Details

- **Project Description:** Write a description of the project in simple, easy-to-understand terms. This is where you want to put “the why.” Include a little bit of backstory for context and what the desired outcome is. Avoid acronyms.
- **Scope:** List what in scope as well as what’s out of scope. Being specific about scope will help manage expectations.
- **Deliverables:** List the products or results you expect upon completion of the project.
- **Goals Alignment:** State how your project aligns with your organization’s Board Goals, LCAP Goals, Department Goals, etc.
- **Objectives/Success Criteria:** Think about how you will know if your project was a success. For the items you list here, there should be some way to measure or have evidence that your project was successful. Examples: Improved efficiency, improved process, increased satisfaction.
- **Risks:** Make a list of potential risks and include how you will mitigate the risk. Sometimes doing this helps you identify new project needs.

## Part IV: Project Schedule & Milestones

- Think through the phases and major milestones for your project.
- You will not know EVERY task and activity. Try to gather as much as you can to create a realistic schedule and phases.
- Remember to include time at the end to close out your project.
- Keep in mind that you will use Part IV to build out your project plan later.

## Part V: Tools

- Consider which tools are needed for this project. You can make these match the tools your organization uses. For example, if you are using Google Drive, make sure you identify the location and who needs access.

## When you’re done...

- Meet with your Project Sponsor and review the Project Charter. Obtain authorization to proceed.
- Type their name and authorization date at the top of the Project Charter; remove ‘DRAFT’.
- Store the Project Charter in your file repository for your project.