

Project Charter Lite Guidance

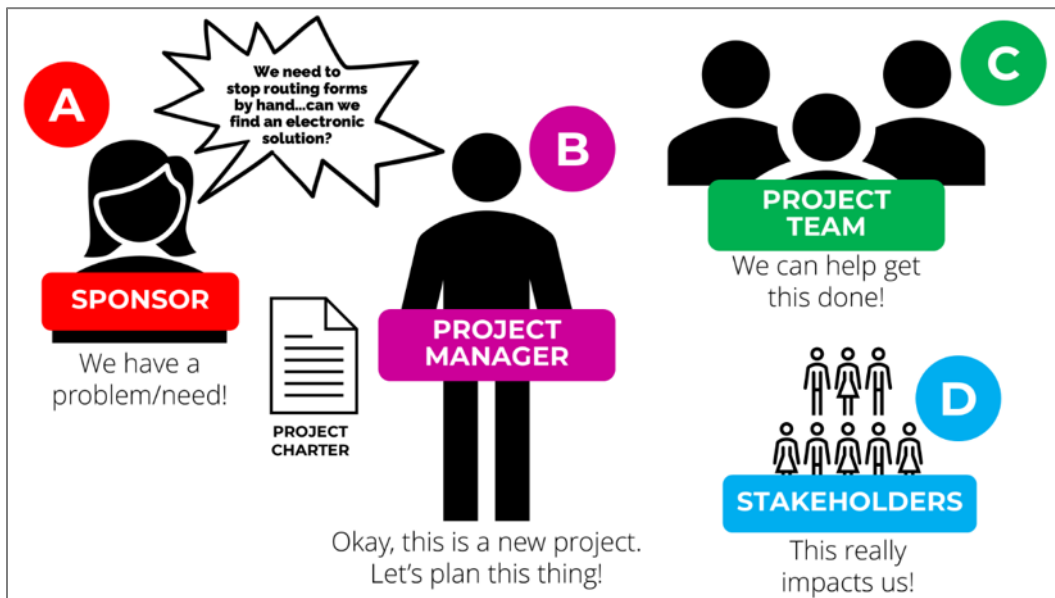
Version 1.0 | Updated September 1, 2026

The Project Charter Lite helps you and your team get on the same page about what you're doing, why you're doing it, who's involved, what's in and out, and how you expect to get there.

Project Charter Lite: What It Is

- Download the template: [Project Charter Lite Template.docx](#)
When you click the link, it will download a Word document from the EPMO website.
- The **Project Charter Lite** is a one-page planning tool for smaller or less complex projects
- It captures the essentials: **purpose, people, scope, timeframe, and major milestones**
- It is **not just paperwork** and it is **not a detailed project plan**; its purpose is to create shared understanding before and during the work

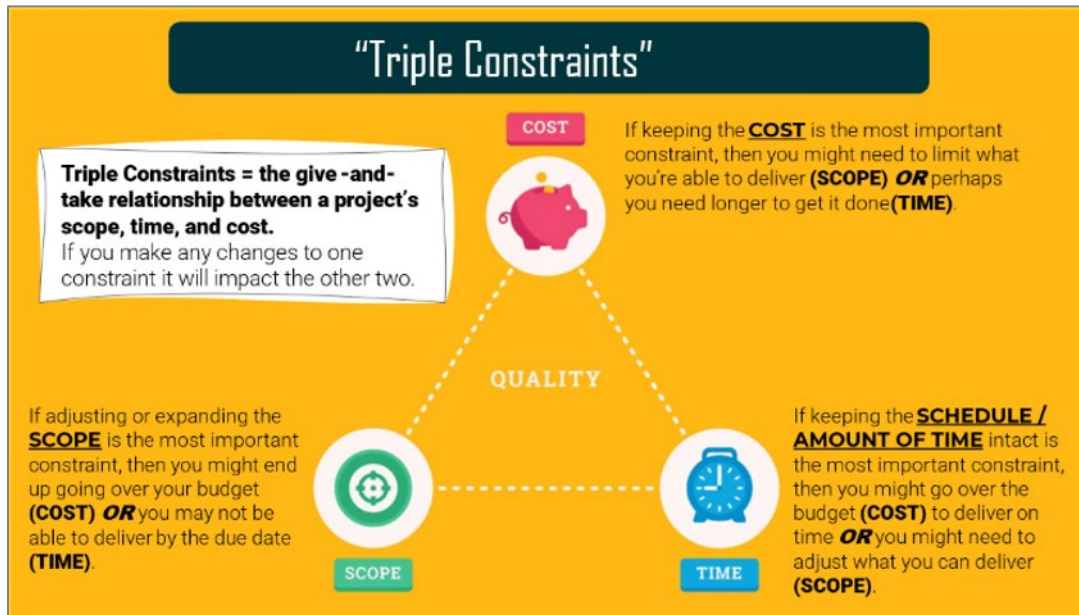
Project Roles



- **Sponsor:** Provides direction, support, and authority for the project
- **Project Manager:** Coordinates the project and keeps the work moving
At SDCOE, the staff member in the Project Manager role is a manager.
- **Project Team:** Completes the project work
- **Project Lead (optional):** A project team member; may lead a specific workstream or area of expertise
- **Stakeholders:** People or groups affected by or interested in the project

Whenever possible, the Project Manager should develop the project charter with the Sponsor and Project Team (and possibly stakeholder input), rather than completing it alone.

Triple Constraints: Scope, Time & Cost/Resources



Every project is affected by three connected constraints:

- **Scope:** What the project will (and will not) deliver
- **Time:** Start/end dates, deadlines, and available time
- **Cost/Resources:** Budget, staff capacity, vendors, equipment, and other resources

When one constraint changes, the others may need to change too. For example, if a deadline cannot move, the team may need to reduce scope or add resources.

Be Clear About Scope

Document both:

- **In Scope:** What the project team is committing to deliver
- **Out of Scope:** What the project will **not** include

Writing down what is out of scope helps prevent expectations from expanding later. Requirements describe what people may want; scope reflects what the team can realistically deliver within the project's constraints.

Build a High-Level Schedule

The Charter schedule should show **major phases and milestones**, not every task.

Examples include:

- Research/discovery
- Purchasing
- Design/configuration/build
- Testing
- Training
- Go-live/implementation
- Operational handoff
- Closeout

Build in enough time for testing, training, issue resolution, documentation, lessons learned, and project closeout. For projects with a fixed deadline, it can help to **start with the end date and plan backward**.

The Project Charter Is a Conversation

Creating a Project Charter is an **iterative, collaborative process**. As you work through it, you may discover:

- New stakeholders
- Missing scope items
- Risks or dependencies
- Questions that still need answers
- Changes needed elsewhere in the Charter

The goal is **project clarity, not simply filling in every box**.

Additional Resources

Project Charter templates, samples, directions, and other project management resources are available on the **EPMO website** at <https://epmo.sdcoe.net>.

Sample

Project Charter Lite

Project authorized by Peyri Herrera on July 1, 2025



1a. Name of Project		1b. Project Date Range (Start, End)	
K-12 Project Management Academy, Cohort 5		7/15/25 - 1/9/26	
2a. Project Sponsor		2b. Project Manager	
Peyri Herrera, EPMO Sr. Director		Peyri Herrera	
2c. Project Team Members		2d. Stakeholder Audience(s)	
• Peyri Herrera • Candace Wong • Reesa Fickett • Andrew Baldwin • Also involved: SDCOE Graphics Team for printing, assembling, packaging, and mailing		• K-12 I.T. staff in San Diego County and beyond	
3. Project Description			
<i>What is the purpose of your project? What need does it fulfill? Who is it for?</i>			
The K-12 Project Management Academy, Cohort 5, is a professional learning program designed by the SDCOE Enterprise Project Management Office (EPMO) to help 32 I.T. staff develop practical project management skills to plan, execute, and close technology projects effectively. The program provides participants with a complete methodology, hands-on tools, and leadership experiences through participation in the K-12 Project Management Conference. This project fulfills SDCOE's goal of building leadership capacity and improving project outcomes across school districts and charter schools.			
4a. What is in scope?		4b. What is out of scope?	
<i>List what will be included in this project.</i>		<i>List the things you will NOT be doing for this project.</i>	
• Design and delivery of three full-day virtual training sessions (Oct 3, Nov 7, Dec 5, 2025) • Creation and distribution of printed and digital learning resources (Padlet, toolkits, journals, activities) • Creation of certificates, evaluation surveys, and a final report • Integration with the June 2026 K-12 Project Management Conference (Conference Crew Member roles)		• On-site, in-person training delivery • Project management services for participants	
5. Project Schedule / Milestones			
<i>Examples: Research/Discovery, Purchasing/Receiving, Configuration/Design/Build/Customization, Testing, Training, Go Live Prep, Go Live/Implementation, Support/Operationalize, Closeout (Lessons Learned, Survey, Final Report, Celebration, Archive, Sign Off)</i>			
Phase / Milestone		Date Range / Target Date	
1. Registration Launch		7/16/25 - 9/12/25	
2. Materials Development & Printing		8/28/25 - 9/16/25	
3. Course Delivery (Modules 1, 2, 3)		10/3/25, 11/7/25, and 12/5/25	
4. Certificate Creation & Survey Distribution		12/8 - 12/18/25	
5. Evaluation and Closeout		1/5 - 1/9/26	
6. Comments / Notes			
This is the fifth time the EPMO is offering this Academy. See pp.2-3 for the learning objectives, pacing, materials, and class roster.			