



Project Name

Purpose of the Project Charter

Instructions are in blue font and should be deleted for the final document.

The Project Charter serves several purposes:

1. Project overview - documentation of relevant background and history and the problem that is to be solved, including goals and objectives
2. Summary scope statement - identifies the boundaries (inclusion/exclusions) of the project.
3. Identifies the goal/aim of the project- including expected deliverables for the project
4. Team roles/responsibilities – documentation of the project structure
5. Project constraints - documentation of issues and factors that may adversely impact the project
6. Milestones – documentation of major project dates for each deliverable.
7. Approval –documentation of the organization’s support of the project

A Project Charter is to be completed prior to the Initiation phase of a project. The signed project charter gives the approval to start the Project Initiation phase and bring together key team members through a structured process to identify the project requirements, to set expectations, uncover hidden issues and misunderstandings, and lay the foundation for a successful project by developing agreed-upon objectives, tasks, schedules, and project requirements.

Project Overview

Define the business problem that needs to be solved, and documents the background of the problem.

Document the current thinking of how the problem will be approached and supports the charter statement. Include embedding community health opportunities.

Document expected stakeholders for the project

Document type of contract: pay for service, flat fee

Summary scope statement

Describe the project scope. The scope should address the inclusions and exclusions for the project.

Goal/Aim of the project

Identify the goal/aim of this project including the specific deliverables.

Team roles responsibilities

The overall structure of the project organization and its roles and responsibilities throughout the project phases. Include the roles of identified project stakeholders. Those roles with a * are required roles.

Team member	Role
	Project sponsor* (COT or PAL member)
	Project lead* (responsible for project implementation, deliverables)
	Leadership oversight team* (responsible for problem solving, review of budget, evaluation criteria and deliverables)

* general role definitions

Project constraints

List and describe any identified project constraints. Typically, constraints will impact timing, cost, resources and/or quality.

Milestones

List the project’s major milestones and the planned completion dates for deliverables.

Document prepared by:

Document date:

Approvals

The signatures of the people below relay an understanding in the purpose and content of this document by those signing it. By signing this document you agree to this as the formal Charter statement sanctioning work to begin on the project described within.

Position/Title	Name	Date
Project Manager		
Project sponsor		
CEO		