***Instructions:*** *Use the guidelines in each box to help you think about how to write a summary for each charter component*.

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| **Project Purpose**  *What business problem does this project solve and how does that tie to a strategic objective? This section should provide the background information about the initiative as well as the purpose of the initiative. Include in this section what would happen if this project is not implemented. This is where you address the "why" of doing the project.* | **Stakeholders**  *Who are the groups that will be directly or indirectly involved or impacted by this project? This helps you determine the resources you need to make aware of the project work as it progresses. Reference the stakeholder engagement plan for more information* |
| **Project Description**  *What will actually be changing as a result of this project? This should describe the actual change being created as a part of this project. It can be helpful to describe the current state and future state to identify the changes. This is where you define the "what."*  *“We will create a new website, a new system, a new business process, etc. that will meet xx objectives by...”* | **Resource Requirements**  *What resources will you need for this project and for what roles? The table below should be completed to define both the technical and business resources needed as well as the roles and responsibilities of the project team.*  Project Sponsor:  Project Manager:  Subject Matter Expert:  Analyst:  Vendor Resources: |
| **Objectives**  *What are the goals this project is expected to accomplish? This section should provide the initiatives key goals. Goals are quantifiable*  *measures of performance levels or accomplishments the initiative is being created to achieve. Goals can be related to cost, scope, time, quality, and/or risk. However, they are different from deliverables.*  *because they are not the outputs of a project.* | **Assumptions**  *What assumptions are being made for this project and under what constraints must this work be completed? To minimize risk, this section should outline the assumptions being made, which are the key aspects of an initiative that are considered to be valid but must be expressly stated to ensure validity and concurrence. Some examples of assumptions include funding, resource availability, or participants’ roles (which can be external or cross organizational).* |
| **Benefits**  *What are the benefits of these goals being achieved? This section should explain why the initiative is needed, summarizing business driver(s) and the benefits to be achieved.* | **Constraints**  *This section should provide a list of restrictions that could affect the performance of an initiative. A predefined budget or pre-defined end date are examples of constraints that can limit an initiative team’s scope, staffing, and schedule options.* |
| **Critical Success Factors**  *What are the benefits of these goals being achieved? This section should identify what the initiative must accomplish in order to be*  *considered successful, including specific measurements that will be used to assess the success of the initiative.* | **Potential Risks**  What risks are associated with this project, if known. Use this section to begin the discussion about what could positively or negatively impact the project. Write *statements in terms of “If, then.” If the new release of the software we need to complete this project is not ready on time, then we will be late with completing the releases to our customers.* |
| **Scope Statement**  *What the customer will get as part of the project (what is “in scope”),*  *including a description of the product/service (features, interfaces with*  *other solution components, dependencies, etc.)* | **Expected Budget**  *What are the preliminary costs of resources including technology, staff, consultants, or other expenses? This section should define the estimate budget requirements for the project including both resource and non-resource related costs.* |
| **Key Deliverables & Acceptance Criteria**  *What are the major deliverables being created via this project? This section should outline the key deliverables that will be provided as a result of completing the initiative and should be defined in sufficient detail to ensure it is clear when each deliverable has been accomplished – the “acceptance criteria.”* | **Proposed Timeline**  *This section should provide the project’s key milestones with their associated target completion dates (if known). Use this to indicate any hard deadlines or dates that must be met. For example, if this is a project to prepare for a conference or event, then the end date would be fixed.* |
| **Scope Exclusions**  *What the customer will not get (what is specifically “out of scope”), or what is specifically excluded from the project.* | **Comments/Additional Information** |