

4-4 Typical Elements in a Project Charter

The following sections list some of the typical key elements in a project charter. While the intent of most of these sections is included in many charters, some project teams combine sections or leave out one or two of them. Furthermore, while the term *charter* is a widely used standard, some organizations use other names such as *project request*, *project submission form*, or *project preplanning form*. As long as the four purposes of a charter (authorization, understanding, commitment, and screening) are accomplished, the exact format and title are negotiable. Typical charter elements and the question each answers are shown in Exhibit 4.3.

The charter should be short enough so that the project team and sponsor (and any other interested stakeholder) can examine it carefully to ensure they understand and agree. Two to four pages in total is generally about the right length.

4-4a Title

The existence of a meaningful project title is critical. In an organization with a number of projects, the title can be used to quickly identify which project is being referenced.

4-4b Scope Overview

The scope overview and business case sections are the high-level “what and why” of the project. They are sometimes considered to be the “elevator speech” that a person would use if given a very short amount of time, such as a one-floor elevator ride, to describe their project. Sometimes an additional background statement is helpful.

The scope overview is the project in a nutshell: a high-level description of what needs to be accomplished and how it will be done. What needs to be accomplished can be described as the **product scope**, the “features and functions that characterize a product,

EXHIBIT 4.3

CHARTER ELEMENTS AND QUESTIONS ANSWERED

CHARTER ELEMENT	ANSWERS THE QUESTION
Scope overview	What?
Business case	Why?
Background	Why?
Milestone schedule	When?
Success criteria	What?
Risks, assumptions, and constraints	Whoa!
Resources	How much?
Stakeholders	Who?
Team operating principles	How?
Lessons learned	How?
Signatures and commitment	Who?