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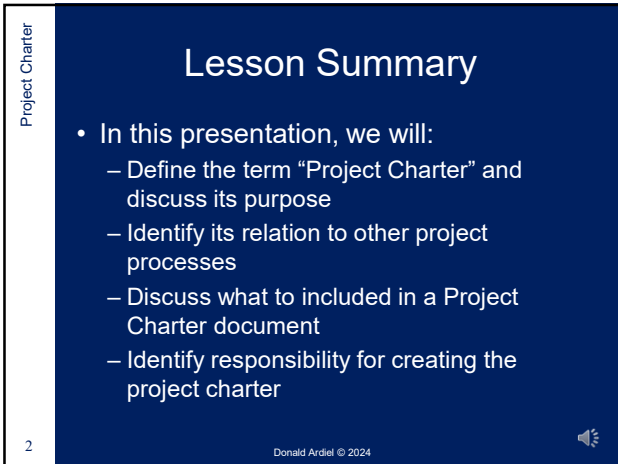
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Project Charter

# The Magna Carta

(The Great Charter)



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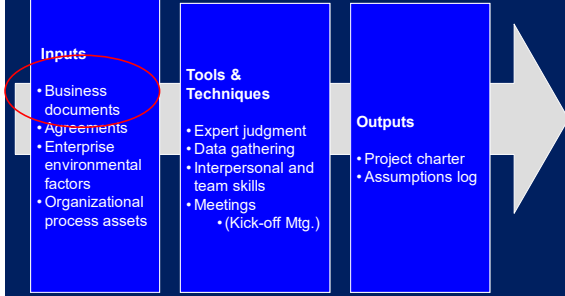
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Project Charter

# Developing the Project Charter



**Inputs**

- Business documents
- Agreements
- Enterprise environmental factors
- Organizational process assets

**Tools & Techniques**

- Expert judgment
- Data gathering
- Interpersonal and team skills
- Meetings
  - (Kick-off Mtg.)

**Outputs**

- Project charter
- Assumptions log

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Project Charter

# What is a Project Charter

- Accord between the organization, project sponsor and the project manager to undertake the project
- Identifies the partners and stakeholders
- Framework to be used for management
- Roles, responsibility and accountabilities
- Outlines commitment of management
- Establishes project governance
- Communication vehicle providing an overview of the project; not a management tool

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Project Charter

## Purpose of Project Charter

- Tool to obtain commitment for the project's objectives from stakeholders
- Lays the foundation for project for the project structure
- Contributes to the success of projects:
  - Structured management organization
  - Disciplined management processes
  - Project governance
  - Project management best practices
  - Internal/external communications

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Project Objectives

## State Project Objectives or Goals

<b>S</b>	Specific
<b>M</b>	Measurable
<b>A</b>	Assignable
<b>R</b>	Realistic
<b>T</b>	Time Related
<b>I</b>	Involve the appropriate team members
<b>E</b>	Environmentally safe and acceptable
<b>S</b>	Success-oriented

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Project Charter

## The Charter and The Team

- Focus on Team Basics
  - Managers should focus on team performance and team basic issues
- Real teams always find ways for each individual to contribute and gain distinction
- Teams are born through disciplined action
  - Similar to following a diet

Katzenback & Smith, *The Wisdom of Teams*, Harvard Business School Press, Cambridge, MA.  
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Project Charter

## The Charter and The Team

- Disciplined actions:
  - Shape a common purpose
  - Agree on performance goals
  - Define a common working approach
  - Develop a high level of complementary skills
  - Hold themselves mutually accountable for results

Katzenback & Smith, *The Wisdom of Teams*, Harvard Business School Press, Cambridge, MA.

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Project Charter

## Focusing on Team Basics

Performance results

**Skills**  
Problem-solving  
Technical/functional  
Interpersonal

**Accountability**  
Mutual  
Few people  
Individual

**Commitment**  
Meaningful purpose  
Specific goals  
Common approach

Team capability and competence

Personal goals

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Project Charter

## The Project Charter in the Overall Process

- Occurs during the Initiation process
- Relates business case to project prioritization
- Planning and communication tool
- Benchmark document throughout the process
- Summary overview of the entire project
- **Unlike other project management documents, does not change throughout the project**

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Project Charter

### Charter – Who prepares it?

- Developed by the project sponsor and/or project manager, working together
  - Project Manager may shepherd process of development and approval
  - PM may not be selected until after charter is approved
  - Dependant on whether the PM is assigned before or after the Charter is developed
- Cannot be done in isolation; all stakeholders are required to input and commit

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Project Charter

### What is included in a Charter?

- Project management disciplines
- Project governance processes
- Formal risks and issues management
- Roles and responsibilities
- Structured communication management processes
- High level description of product or service

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Project Charter

### Charter Outline – Overview

- Project purpose
- Project Objectives
- Project Scope
- Outstanding issues
- Approvals process
- References
- Terminology

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Project Charter

## Charter Outline – Approach

- Project deliverables
- Project organizational structure; roles of each participant
- Dependencies
- Plans for Support Activities
- Project facilities and resources
- Risk Management
- Process Options and Deviations
- Phases
- Project Control
- Quality Control Activities
- Project Schedule
- Project Effort Estimate
- Project Cost Estimate

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## Project Kick-off Meeting

- The Business Case
- Identify stakeholders
- Build Team commitment
- Set expectations:
  - Communications
  - Structure
  - Processes
  - Monitoring and controlling project processes

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## Project Kick-off Meeting

1. Why is this project important?
2. What's the problem you are trying to solve?
3. What are you expecting the project to achieve? What do you see as the high-level objective?
4. Have the project's requirements been documented yet? If so, where? By whom?
5. What's the solution that has been agreed upon, if any? What analysis was done about the proposed solutions?
6. What are the project's success criteria?
7. How does this project tie back to organizational strategy?

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**Project Kick-off Meeting**

<p>8. How is this project going to be funded? Have all the funds already been secured?</p> <p>9. What are the constraints?</p> <p>10. What is most important: time, cost or <u>quality management</u>? Or would you rank something else as the defining measure?</p>	<p>11. Who benefits from the project?</p> <p>12. Who are the other <u>stakeholders</u>?</p> <p>13. What is in scope?</p> <p>14. What is deliberately out of scope and why?</p>
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**Project Kick-off Meeting**

<p>15. What internal and external dependencies should we be aware of?</p> <p>16. Have you done this sort of project before? If so, who can I talk to in order to learn about their experiences?</p>	<p>17. What risks are you aware of already? How risky do you think these risks are? What do you think of these risks I know about already?</p>
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Project Charter

**Lesson Summary**

- In this presentation, we:
  - Defined the term “Project Charter” and discussed its purpose
  - Identified its relation to other project processes
  - Discussed what to included in a Project Charter document
  - Identified responsibility for creating the project charter

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