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| Organisation [Name] |
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| **<Project Charter>** |
| **<Project Name>** |
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* Clarification

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Changes to this document are summarized in the following table in reverse chronological order (latest version first).

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| *<These notes should be deleted in the final version :>***Notes for Templates:*** Text in <orange>:has to be defined.
* *Text in <blue>:* guidelines and how to use the Template. Should be deleted in the final version.
* Text in green: can be customised. Should be recolored to black in the final version.
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# Executive Summary

<This section should provide an executive summary. Complete this section last.>

# Considerations on the Business Case

<This section should include any pertinent considerations to the approved Business Case of the project. Topics such as the impact and urgency of the current situation described in the business case can be further elaborated in this section if necessary.

Validate, at project level, the external influences and impacts, such as interfaces, needs, and regulatory requirements that are to be addressed. Re-check how urgent it is to address the situation (how quickly does it need to be addressed). Note that the urgency should not be confused with the impact because it can have a small impact but it can still be an urgent situation to address.>

# Project Description

## Scope

### Includes ("IN" Scope)

<This section should identify what it is considered as in scope of the project, i.e., the outputs that the project **WILL** deliver and which form the solution which addresses the current situation (problem, need or opportunity). The definition of the scope can be complemented with the scope of organisational change management activities associated with the implementation of the project and required to achieve the intended benefits.>

### Excludes ("OUT" Scope)

<This section should identify what it is considered as out of scope of the project, i.e., that the project will **NOT** deliver. From the synergies, interrelations and dependencies of the proposed solution, some areas of concern might seem to be part of the scope of the project. It is as important to define what is in scope, as what is out of scope of the project, to better manage the expectations of the project's owner and stakeholders. Examples are deliverables that were discussed as being part of the scope but given project constraints have been marked as out-of-scope>

### Scope Statement

<This section should present an overall scope statement for the project in one or two lines. It should be complete enough for the management and outsiders to understand the scope of the project.>

## Success Criteria

<This section should describe the success criteria of the project. Think of success criteria as the measurable criteria based on which the project as a whole can be deemed as a success or a failure.>

<Critical criteria for the project are those which in their absence the project cannot be considered a success. Success criteria may be on scope, schedule and costs. Try to distinguish any product success criteria from the overall project success criteria, in a way that the latter can relate to the project's expected outcomes.>

<Example: Training project –"minimum of 4500 staff members trained in 19 countries from the project target of 5000 staff members in 20 countries".>

## Stakeholder and User Needs

<This section should list the key needs of the stakeholders and users that the project shall address.

(A user is considered as a group – or individual – that will use one or more of the project's outputs).

Use the questions below to help you describe each need:

* Who is the stakeholder of this need?
* What is the need? What solutions does the stakeholder want?
* What are the reasons that justify addressing this need?
* How is it currently addressed?

It's also important to indicate the relative importance of each need (from the stakeholder/user perspective). Ranking and cumulative voting techniques can reveal needs that must be addressed versus needs that stakeholders/users would like to be addressed (potentially).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Need Description** | **Priority** |
|  |  |  |
|  |  |  |
|  |  |  |

## Deliverables

*<This section should identify the deliverables or outputs of the project. Think of deliverables as a tangible or intangible object produced as a result of the project that is intended to be delivered to the Project Owner’s organisation. A deliverable could be an automated report, a document, a server, a new policy or regulation, a conference, a training, a campaign, etc. A deliverable may be composed of multiple sub-deliverables.*

*Note that the standard project management deliverables (e.g. the PM2 Artefacts) should not be considered in this section.>*

|  |  |  |
| --- | --- | --- |
| **ID** | **Deliverable Name**  | **Deliverable Description** |
|  |  |  |
|  |  |  |
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## Features

*<This section should define the expected features of the outputs that will be delivered to the users and to the project owner organisation. Think of features as the high-level capabilities associated to the outputs that are necessary to deliver the expected benefits to the users. At this moment of the project, keep feature descriptions at a high level and focus on capabilities needed and why (not how) they should be implemented. These features will be expanded in greater detail later in the project as it becomes necessary to detail how these features will be implemented by the project core team.*

*To structure the way the features are identified and described, align them with the previously defined stakeholders and user needs. Keep in mind that one need may be answered by implementing several features.*

*Because this document is reviewed and read by a wide variety of stakeholders, the level of detail should remain general enough for everyone to understand it. However, enough detail must be available to provide the next stages of the project with the information needed to detail how the outputs will respond to the stakeholders and user needs.*

*Note: An example of a feature for an issue tracking system (IT System) might be the ability to provide a specific type of report. As the use-case model takes shape, it is recommended that you update their descriptions to refer to the use cases that detail them.>*

|  |  |  |
| --- | --- | --- |
| **Related Need** | **Features** | **Deliverable(s)** |
| <Please refer to the identifier of the need (ID)>  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

*<Example:*

* *Need: consumers face problems in selecting the best and cheapest energy company that provides electricity and gas for homes.*
* *Deliverable: a website to inform customers with up-to-date information on energy providers, prices, and terms & conditions.*
* *Feature: website should allow the consumer to enter the most relevant selection criteria to select the best fitting energy provider in the market.*

*Note: Features and needs are examples of Requirements. For advanced Requirement Management, you can refer to the PM² Requirement Management Plan and/or use the Requirement Traceability Matrix artefact.>*

## Constraints

*<This section should describe any project constraints that affect the way we can manage this project. Constraints can come from areas such as the people that can be involved, schedule, budget, resources, products to be reused or acquired, technology to be employed and interfaces to other products. List the project constraints based on the current knowledge.*

*Also list decisions and compliance related constraints. Mention constraints that arise both from the organisation as well as from the external (to the project or/and organisation) environments.*

*If a separate document does not exist, you can include information related to security constraints, document management constraints, data protection constraints, or other.>*

## Assumptions

*<This section should describe any project assumptions related to business, technology, resources, organisational environment, scope, expectations, or schedules.*

*At this stage, assumptions are considered to be facts (true); however they need to be further validated to ensure that they are indeed facts. Note that assumptions that have not been validated may become risks.>*

## Risks

<This section should highlight the key project risks that are identified at this initial stage and proposes corresponding risk management strategies. This initial risk assessment does not replace the full risk assessment that is conducted during the planning phase. You may refer to the project's Risk Log for a complete list and description of risks and corresponding actions – provide a link to the project's Risk Log.>

| **ID** | **Risk Description & Details** | **Status** | **Likelihood**[[1]](#footnote-1) | **Impact**[[2]](#footnote-2) | **Risk Level**[[3]](#footnote-3) | **Risk Owner** | **Risk Response Strategy[[4]](#footnote-4)** | **Action Details** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
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# Cost, Timing and Resources

## Cost

<This section should describe the financing structure: Expenditures, budget lines, efforts and amounts.

Also provide a summary of previous investments in this area (e.g. when this project is a follow-up project).>

Provide the **T**otal **C**ost of **O**wnership (TCO) of the delivered solution (project output). Calculate the cost for the involvement of the project team and all stakeholders (including costs, if any, for other organisations and/or external stakeholders).>

<Provide at least the information requested in the table below, and add further details if necessary, such as any resulting cost savings.>

|  | **202a** | **202b** | **202c** | **202d** | **202e** |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Expenditure** | **Budget Line** | **Amount[[5]](#footnote-5)** | **Budget Line** | **Amount** | **Budget Line** | **Amount** | **Budget Line** | **Amount** | **Budget Line** | **Amount** | **Total cost** |
| Solution Development*[[6]](#footnote-6)* (k€) |  |  |  |  |  |  |  |  |  |  |  |
| Solution Maintenance*[[7]](#footnote-7)* (k€) |  |  |  |  |  |  |  |  |  |  |  |
| Support *[[8]](#footnote-8)* (k€) |  |  |  |  |  |  |  |  |  |  |  |
| Training*[[9]](#footnote-9)* (k€) |  |  |  |  |  |  |  |  |  |  |  |
| Infrastructure*[[10]](#footnote-10)* (k€) |  |  |  |  |  |  |  |  |  |  |  |
| **Total per year (k€)** |  |  |  |  |  |  |  |  |  |  |  |
| **Total per year FTE internal staff*[[11]](#footnote-11)***  |  |  |  |  |  |  |  |  |  |  |  |

## Timing and Milestones

<This section should list the important project points in time of the project lifecycle (i.e. milestones) for events or project deliverables. The list can include an indication regarding the foreseen timing of the major project phases (e.g. the PM2 phases of Initiating, Planning, Executing, Closing), as well as both project and project management deliverables (e.g. the Project Work Plan and the date it's expected to be finalized).>

| **ID** | **Milestone Description** | **Target Delivery Date** |
| --- | --- | --- |
|  |  |  |
|  |  |  |

## Planned Resources

*<This section should describe project's resources requirements. Summarise here the numbers and type of staff required, including any special skills or experience, scheduled by project phase. Describe how you will approach finding and acquiring resources needed for the project: staff and equipment. Include all resources required to execute the project in all user/stakeholder groups including resources required in other organisations and/or external stakeholders (if any).*

*For non-human resources such as office space, special facilities, computer equipment, office equipment, and support tools, you can also identify which role is responsible for provisioning the specific items.*

| **ID** | **Resource Requirement** | **Description** |
| --- | --- | --- |
|  |  |  |
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# Approach

## Methodology

*<This section should mention the chosen project management methodology that the project will follow. In case that PM2 is not the chosen project management methodology, this section should describe the deviations to the standard/proposed project management methodology.*

*For the domain-specific work (e.g. information systems development), this section should also mention the chosen methodology or describe the deviations from the standard/proposed domain-specific methodologies (e.g. for information systems development, this section should describe the deviations from the standard and/or the proposed IT information systems development methodology).>*

## Change Management

*<The sections below should describe how changes to the project will be handled, how changes to project documentation and other deliverables will be handled, and how Organisational changes will be handled.*

### Project Change

*<This section should describe the adopted project change management process. The changes to the content of this document (the description of the project) are subject to formal approval. Please refer to the PM2* ***Project Handbook*** *that describes the standard change control process for the project.>*

### Configuration Management

*<This section should describe the activities concerned with the creation, maintenance and controlled change of project items throughout the life of the project. All items which can only be modified after authorization by the relevant persons or committee (such as the project scope, budget and milestone dates and other key project documentation) should be identified, along with the process for controlling changes to such items.>*

*For more details, please refer to the PM2* ***Project Handbook*** *which describes the standard configuration management process for projects.>*

### Organisational Change

*<This section should describe any organisational change goals and activities (further elaborated and planned in the PM2 Business Implementation Plan) that need to be taken in to consideration.>*

# Governance and Stakeholders

## Structure

*<This section should describe the organisational structure of the project team and stakeholders, preferably providing a graphical representation. Please also refer to (or simply reference) the PM2 Methodology which, for instance, defines and describes the members and responsibilities of the Project Steering Committee (PSC) (i.e. Project Owner (PO), Business Manager (BM), Solution Provider (SP), Project Manager (PM)) .>*

## Roles and Responsibilities

*<This section should describe the Roles and Responsibilities of the Project Governance. You can refer to the PM2 Methodology and include the assignment of the Standard PM2* ***Roles and Responsibilities****, or/and define any deviations from the Standard.>*

## Other Stakeholders

*<This section should identify all the stakeholders of the project and provide a brief profile description of the key stakeholders (and user groups) involved in the project, and the key problems that they perceive to be addressed by the proposed solution. It does not describe their specific requests or requirements as these should be captured in a separate artefact, however, it provides the background and justification for why the requirements are needed.>*

Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>**<02.Business\_Case.XYZ.dd-mm-yyyy.V.1.0.docx>* | *<Example of a location>**< U:\ PROJECTS\ProjectX \Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 |  |  |

1. A numeric value denoting the relative probability that the risk should occur. [↑](#footnote-ref-1)
2. A numeric value denoting the relative severity of the impact of the risk if it should occur. [↑](#footnote-ref-2)
3. The risk level is the product of the likelihood and impact (RL=L\*I). [↑](#footnote-ref-3)
4. The possible risk response strategies are: Avoid / Accept / Reduce / Transfer for negative risks (threats) and Exploit / Accept / Enhance / Share for positive risks (opportunities). [↑](#footnote-ref-4)
5. If you cannot provide an amount, provide at least a qualitative statement (e.g. 20 days of training, 2 laptops, etc.) [↑](#footnote-ref-5)
6. Development: provide the total (anticipated) cost (human resources) for the development of the solution [↑](#footnote-ref-6)
7. Maintenance: provide the total (anticipated) cost (human resources) in K€ per year to maintain the solution [↑](#footnote-ref-7)
8. Support: provide the total (anticipated) cost (human resources) in K€ per year to support the solution (e.g. website, helpdesk, operations, etc.) [↑](#footnote-ref-8)
9. Training: provide the total (anticipated) cost (human resources) to ensure the training of the users, the support and operations staff, etc. [↑](#footnote-ref-9)
10. Infrastructure: provide the total (anticipated) cost of the infrastructure required to deliver, support, operate and maintain the delivered solution. [↑](#footnote-ref-10)
11. Total FTE internal staff: provide the total (anticipated) effort that will be spent by internal staff on the project (in person-days, man-weeks, man-months or man-years). [↑](#footnote-ref-11)