

## Project Charter Template

### Introduction

This document provides outlines, for a scalable charter tool and associated charter development methods that can be used by Implementing Agencies (IA) to initiate and authorize a capital project. These tools were prepared by the CPMWG Scalable Project Management Tools Subcommittee as one of the deliverables. The tools may be adjusted to meet IA needs provided the IA keeps the elements of the tools.

PMBOK 2013 provides this definition for a Project Charter: "The project charter is issued by the project initiator, or sponsor that formally authorizes the existence of a project, and provides the project manager with the authority to apply organizational resources to project activities."

The Charter Template is the tool for authorizing all Checklists A, B, and C projects. This tool is scalable for all Checklist A, B, and C project categories as defined in the CPMWG2 Scalable Tools Work Product. The level of detail in the charter should be scaled as appropriate for the size and complexity of the project, but each topic in the Charter Template should be considered for all Checklist projects.

For small projects, under the Checklist threshold (less than \$100k), individual IA's should develop a small project initiation process. The Charter Template tool can also be used as a resource for IA's to develop their small project initiation process. Some IA's have also chosen to use a project initiation form to initiate the preparation of the project charter for larger projects.

The project charter tool requires inputs from a variety of project planning and management processes to produce the charter. Examples of these processes include scoping, cost estimating, scheduling and risk evaluation. The recommendations in this document assume that project managers have experience in these processes. The project management processes with particular application in meeting King County's project chartering requirements are described within the template tool.

### Purpose

To provide IA management, project managers, and other staff who manage King County capital improvement projects (CIP) with a scalable tool for preparing and approving Project Charters.

### Objectives

These are the objectives of the charter tool:

1. Describe the use of the Project Charter tool.
2. Present an overview of selected charter development processes that have specific application to King County charter requirements.
3. Familiarize IA staff with terminology associated with project charters.
4. Provide a list of resources to aid in preparing a project charter.

### 1 – Project Charter Template

The Project Charter Template includes key items to include in a charter document, ranging from project identification, scoping, cost and schedule projections, to approvals. The template presents a list of the recommended elements to be included. The project manager should address each individual topic in the

# Charter Document Example

**Phillip J. Lederer, Uday S. Karmarkar**



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integrate the appropriate improvement approaches with honesty commitment and co

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