

PROJECT CHARTER TEMPLATE

Standard Editable Word Document for Project Management

Area	Explanation
Template Purpose	Formally authorize a project, define the business reason, name the sponsor and project manager, document high-level scope, schedule, budget, risks, assumptions, constraints, and approvals.
Best Used During	Project initiation, before detailed planning and execution begin.
Primary Users	Project sponsor, project manager, PMO, steering committee, delivery team, client/customer representatives, and key stakeholders.
How to Edit	Replace bracketed placeholder text, complete each table, remove instructions that are not needed, then route the approval page for signature.

What this Word template explains

This template explains the foundation of a project: why the project exists, what value it should deliver, what is inside and outside scope, who owns decisions, how success will be measured, and what authority is granted to the project manager.

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1. Instructions for Using This Template

Complete this section first, then fill out the charter sections. Delete instructional notes before final approval if your organization requires a clean charter.

Step	Action	How to Complete It
1	Create the first draft	Project manager drafts the charter using sponsor input, business case material, contract/SOW, feasibility study, and stakeholder interviews.
2	Define the purpose	Write a clear project purpose, business justification, strategic alignment, and expected benefits.
3	Set scope boundaries	List what is in scope, out of scope, and excluded so stakeholders understand early limits.
4	Name accountable roles	Confirm sponsor, project manager, steering committee, key stakeholders, and escalation path.
5	Estimate high-level plan	Add major milestones, budget estimate, resource needs, initial risks, assumptions, constraints, and dependencies.
6	Approve	Route the final document to the sponsor and required approvers. Approval authorizes the project to proceed to planning.

Professional completion rule

A project charter should be brief enough for executives to review quickly but complete enough to authorize work, funding, resources, and decision-making authority. Keep details high level; save detailed schedules, cost baselines, risk responses, and procurement plans for the project management plan.

Document Control

Field	Enter Details	Guidance
Project Name	[Enter details here]	Official project name.
Project Code / ID	[Enter details here]	Internal project reference number.
Prepared By	[Enter details here]	Name and role of person preparing the charter.
Document Owner	[Enter details here]	Usually the project manager or PMO.
Sponsor	[Enter details here]	Executive or customer who authorizes the project.
Version	[Enter details here]	Use version control such as v0.1, v1.0, v1.1.
Date	[Enter details here]	Date of this version.

Field	Enter Details	Guidance
Confidentiality	[Enter details here]	Public, Internal, Confidential, Restricted, etc.

Version	Date	Prepared / Updated By	Summary of Changes	Approved By
0.1	[Date]	[Name]	Initial draft created	[Name]
1.0	[Date]	[Name]	Approved baseline version	[Name]
1.1	[Date]	[Name]	[Describe revision]	[Name]

2. Project Executive Summary

Use this one-page summary to help senior stakeholders understand the project at a glance.

Charter at a Glance

Field	Enter Details	Guidance
Project Purpose	[Enter details here]	One to three sentences explaining why the project is needed.
Business Problem / Opportunity	[Enter details here]	Pain point, improvement opportunity, compliance need, customer request, or strategic initiative.
Expected Outcome	[Enter details here]	Future state expected after the project is complete.
Sponsor Decision Needed	[Enter details here]	What approval, funding, or authorization is needed.
Target Start Date	[Enter details here]	Planned start date.
Target Finish Date	[Enter details here]	Planned finish date or target launch.
Estimated Budget	[Enter details here]	High-level estimate only.
Priority Level	[Enter details here]	Critical / High / Medium / Low.

Executive Summary Narrative

[Write a concise executive summary covering the business need, project response, expected benefits, high-level scope, schedule, budget, and approval request.]

Tip: Keep this section short. It should allow an executive to understand the project in less than two minutes.

3. Business Case and Strategic Alignment

Explain why this project should be authorized now and how it supports organizational goals.

Business Case Summary

Field	Enter Details	Guidance
Current Situation	[Enter details here]	Describe the current problem, opportunity, gap, risk, customer demand, or regulatory driver.
Business Need	[Enter details here]	State why action is required.
Strategic Alignment	[Enter details here]	Link to strategic objectives, OKRs, portfolio goals, compliance obligations, or customer commitments.
Benefits Expected	[Enter details here]	Financial, operational, customer, quality, compliance, or risk-reduction benefits.
Consequences of Not Doing	[Enter details here]	Explain cost, risk, delay, lost revenue, compliance exposure, or stakeholder impact if project is not approved.

Benefit	Measurement Method	Baseline	Target	Benefit Owner
[Example: Reduce manual reporting time]	[Hours saved per month]	[Current baseline]	[Target value]	[Owner]
[Example: Improve customer response time]	[SLA / turnaround time]	[Current]	[Target]	[Owner]
[Benefit]	[Measure]	[Baseline]	[Target]	[Owner]

4. Objectives, Success Criteria, and Requirements

Define what success means before work begins. Objectives should be measurable and aligned to the business case.

Objective ID	SMART Objective	Success Criteria / KPI	Target Date	Owner
OBJ-01	[Specific, measurable objective]	[How completion/success will be measured]	[Date]	[Owner]
OBJ-02	[Specific, measurable objective]	[How completion/success will be measured]	[Date]	[Owner]
OBJ-03	[Specific, measurable objective]	[How completion/success will be measured]	[Date]	[Owner]

Objective ID	SMART Objective	Success Criteria / KPI	Target Date	Owner
OBJ-04	[Specific, measurable objective]	[How completion/success will be measured]	[Date]	[Owner]

Req. ID	High-Level Requirement	Source / Stakeholder	Priority	Acceptance Evidence
REQ-01	[Requirement statement]	[Sponsor / customer / regulation]	Must / Should / Could	[Evidence needed]
REQ-02	[Requirement statement]	[Source]	Must / Should / Could	[Evidence needed]
REQ-03	[Requirement statement]	[Source]	Must / Should / Could	[Evidence needed]
REQ-04	[Requirement statement]	[Source]	Must / Should / Could	[Evidence needed]

Success criteria guidance

Success criteria should be measurable enough to decide whether the project delivered the promised value. Avoid vague statements such as 'improve quality' unless a metric is included.

5. Scope Definition

Document the early boundaries of the project. The charter is high level; detailed scope will be expanded later in the scope baseline.

Scope Area	In Scope	Out of Scope / Exclusions	Notes
Products / Services	[What will be delivered]	[What is not included]	[Notes]
Business Processes	[Processes affected]	[Processes excluded]	[Notes]
Locations / Departments	[Locations/departments included]	[Excluded areas]	[Notes]
Systems / Technology	[Systems included]	[Systems excluded]	[Notes]
Data / Reporting	[Data/reporting included]	[Excluded reporting/data]	[Notes]

Deliverable ID	Major Deliverable	Description	Acceptance Criteria	Owner
DEL-01	[Deliverable]	[High-level description]	[Acceptance criteria]	[Owner]

Deliverable ID	Major Deliverable	Description	Acceptance Criteria	Owner
DEL-02	[Deliverable]	[High-level description]	[Acceptance criteria]	[Owner]
DEL-03	[Deliverable]	[High-level description]	[Acceptance criteria]	[Owner]
DEL-04	[Deliverable]	[High-level description]	[Acceptance criteria]	[Owner]

6. Stakeholders, Roles, and Project Authority

Identify who is involved, who approves, and what authority is assigned to the project manager.

Role	Name	Department / Organization	Responsibility	Authority / Decision Rights
Project Sponsor	[Name]	[Department]	Owns business case, funding, strategic decisions, and final approval.	Approves charter, major changes, funding, and escalation decisions.
Project Manager	[Name]	[Department]	Plans, coordinates, monitors, reports, manages issues/risks, and leads delivery.	Authorized to coordinate assigned resources and escalate decisions.
Customer / Client	[Name]	[Organization]	Defines needs and validates outcomes.	Approves relevant acceptance criteria.
PMO	[Name]	[Department]	Provides methodology, governance, controls, and reporting standards.	Advisory / assurance authority.
Steering Committee	[Names]	[Departments]	Provides direction and resolves escalated conflicts.	Approves priority, scope, budget, and schedule trade-offs.

Stakeholder	Interest / Need	Influence	Engagement Approach	Communication Frequency
[Stakeholder 1]	[What they care about]	High / Medium / Low	[Manage closely / keep informed / consult]	[Weekly / Monthly / Milestones]
[Stakeholder 2]	[Need]	High / Medium / Low	[Approach]	[Frequency]
[Stakeholder 3]	[Need]	High / Medium / Low	[Approach]	[Frequency]
[Stakeholder 4]	[Need]	High / Medium / Low	[Approach]	[Frequency]

Project Manager Authority Statement

Field	Enter Details	Guidance
Resource Authority	[Enter details here]	State whether the project manager may request, allocate, or coordinate resources.
Budget Authority	[Enter details here]	State spending or approval limits if applicable.
Schedule Authority	[Enter details here]	State authority to set dates, run project meetings, manage dependencies, and escalate delays.
Change Authority	[Enter details here]	State what changes the project manager can approve and what must go to sponsor/committee.
Escalation Authority	[Enter details here]	Define escalation rights, path, and expected response time.

7. High-Level Schedule and Milestones

Add a summary timeline. Detailed tasks, dependencies, and baselines will be developed later in the project schedule.

Milestone ID	Milestone	Description	Planned Date	Decision / Approval Needed	Owner
M-01	Charter Approved	Formal authorization received.	[Date]	Sponsor approval	Sponsor
M-02	Planning Complete	Project management plan and baselines approved.	[Date]	Steering approval	Project Manager
M-03	Design / Requirements Approved	Requirements/design agreed.	[Date]	Customer/sign-off	[Owner]
M-04	Build / Execution Complete	Major work packages completed.	[Date]	Readiness review	[Owner]
M-05	Launch / Go-Live	Solution delivered or service launched.	[Date]	Go/no-go decision	Sponsor
M-06	Project Closure	Acceptance, lessons learned, and closure report completed.	[Date]	Closure approval	Project Manager

Phase	Planned Start	Planned Finish	Key Output	Status / Notes
Initiation	[Date]	[Date]	Approved project charter	[Notes]

Phase	Planned Start	Planned Finish	Key Output	Status / Notes
Planning	[Date]	[Date]	Approved project management plan	[Notes]
Execution	[Date]	[Date]	Completed deliverables	[Notes]
Monitoring and Control	[Date]	[Date]	Performance reports and control actions	[Notes]
Closure	[Date]	[Date]	Accepted deliverables and closure report	[Notes]

8. Budget, Funding, and Resource Summary

Record initial estimates. These are planning-level figures and should be refined during detailed planning.

Cost Category	Description	Estimated Amount	Funding Source	Assumptions / Notes
Labor / Internal Resources	[Team effort, PM, analysts, developers, SMEs]	[Amount]	[Source]	[Notes]
External Services	[Vendors, consultants, contractors]	[Amount]	[Source]	[Notes]
Technology / Tools	[Software, licenses, hosting, equipment]	[Amount]	[Source]	[Notes]
Training / Change Management	[Training, communications, adoption]	[Amount]	[Source]	[Notes]
Contingency	[Reserve for known uncertainty]	[Amount]	[Source]	[Notes]
Total Estimate	[Total high-level estimate]	[Total]	[Source]	[Notes]

Resource Type	Estimated Need	Timing	Named Resource / Team	Availability Risk
Project Manager	[FTE / hours]	[Dates]	[Name]	Low / Medium / High
Business SME	[FTE / hours]	[Dates]	[Team]	Low / Medium / High
Technical Team	[FTE / hours]	[Dates]	[Team]	Low / Medium / High
Vendor / Consultant	[FTE / hours]	[Dates]	[Vendor]	Low / Medium / High
Quality / Testing	[FTE / hours]	[Dates]	[Team]	Low / Medium / High

9. Risks, Assumptions, Constraints, and Dependencies

Capture known uncertainty early so sponsors understand what could affect success.

Risk ID	Risk Statement	Cause	Impact	Probability	Initial Response / Owner
R-01	[If event occurs, then impact may happen]	[Cause]	High / Medium / Low	High / Medium / Low	[Mitigate / avoid / transfer / accept / owner]
R-02	[Risk statement]	[Cause]	High / Medium / Low	High / Medium / Low	[Response / owner]
R-03	[Risk statement]	[Cause]	High / Medium / Low	High / Medium / Low	[Response / owner]
R-04	[Risk statement]	[Cause]	High / Medium / Low	High / Medium / Low	[Response / owner]

Type	Item	Description	Owner	Validation / Control
Assumption	[Assumption 1]	[What is believed to be true for planning]	[Owner]	[How it will be validated]
Assumption	[Assumption 2]	[Description]	[Owner]	[Validation]
Constraint	[Constraint 1]	[Budget, time, resources, legal, quality, technology, etc.]	[Owner]	[How it will be controlled]
Constraint	[Constraint 2]	[Description]	[Owner]	[Control]
Dependency	[Dependency 1]	[Internal/external dependency]	[Owner]	[Tracking method]
Dependency	[Dependency 2]	[Description]	[Owner]	[Tracking method]

Risk note

The charter does not replace a detailed risk register. It captures the top early risks so the sponsor can decide whether the project should proceed and what support is needed.

10. Governance, Communication, and Change Control

Define how decisions, reporting, and changes will be handled after the project is authorized.

Governance Item	Description	Owner	Frequency / Trigger	Output
Steering Committee	[Purpose and membership]	[Chair / Sponsor]	[Monthly / milestone]	Decisions, escalations, approvals
Project Status Reporting	[Report content and audience]	Project Manager	[Weekly / bi-weekly]	Status report
Issue Escalation	[Escalation path and SLA]	Project Manager	When issue exceeds tolerance	Decision / action

Governance Item	Description	Owner	Frequency / Trigger	Output
Quality Review	[Review method]	[Owner]	[Milestone / phase gate]	Quality sign-off
Change Control	[How scope/schedule/budget changes are requested and approved]	Project Manager / Sponsor	When change is requested	Approved/rejected change record

Audience	Information Needed	Format / Channel	Frequency	Owner
Sponsor	Progress, risks, decisions needed	Executive summary / meeting	[Weekly/monthly]	Project Manager
Project Team	Tasks, dependencies, blockers	Team meeting / dashboard	[Weekly]	Project Manager
Customer / Client	Deliverables, decisions, acceptance	Meeting / email	[Milestone]	Project Manager
PMO	Governance metrics and compliance	Status report	[Monthly]	Project Manager
Wider Stakeholders	Impacts, changes, timeline	Newsletter / briefing	[As needed]	Change Lead

11. Acceptance, Approval, and Authorization

Approval of this section formally authorizes the project and confirms sponsor support.

Approval Statement

Field	Enter Details	Guidance
Authorization	[Enter details here]	State that the project is authorized to move into planning/execution according to organizational governance.
Funding Approval	[Enter details here]	State approved funding amount or the next funding decision required.
Resource Approval	[Enter details here]	State that resources may be requested or assigned.
Decision Tolerances	[Enter details here]	State acceptable variance/tolerance for budget, schedule, and scope before escalation is required.
Conditions of Approval	[Enter details here]	List conditions, open actions, or limitations attached to approval.

Approver Name	Role	Approval Decision	Signature	Date	Comments
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Approver Name	Role	Approval Decision	Signature	Date	Comments
[Name]	Project Sponsor	Approved / Rejected / Conditional		[Date]	[Comments]
[Name]	Business Owner	Approved / Rejected / Conditional		[Date]	[Comments]
[Name]	Project Manager	Acknowledged		[Date]	[Comments]
[Name]	PMO / Governance	Reviewed		[Date]	[Comments]
[Name]	Customer / Client	Approved / Rejected / Conditional		[Date]	[Comments]

Final approval meaning

When signed, this charter confirms the project purpose, high-level scope, sponsor commitment, project manager authority, and authorization to proceed according to the governance rules in this document.

12. Quality Checklist Before Approval

Use this checklist to confirm the charter is complete, reviewable, and ready for sponsor approval.

Check	Question	Status	Owner / Notes
1	Is the business need clear and connected to strategy?	Complete / Pending / N/A	[Notes]
2	Are objectives measurable and realistic?	Complete / Pending / N/A	[Notes]
3	Are in-scope and out-of-scope items clear?	Complete / Pending / N/A	[Notes]
4	Are major deliverables and acceptance criteria identified?	Complete / Pending / N/A	[Notes]
5	Are sponsor, project manager, stakeholders, and decision rights named?	Complete / Pending / N/A	[Notes]
6	Are milestones and high-level budget estimates realistic?	Complete / Pending / N/A	[Notes]
7	Are top risks, assumptions, constraints, and dependencies documented?	Complete / Pending / N/A	[Notes]
8	Is the approval page ready for signature?	Complete / Pending / N/A	[Notes]

13. Appendix A - Glossary

Define key terms to avoid confusion during review and approval.

Term	Meaning in This Charter
Project Charter	Document that formally authorizes the project and gives the project manager authority to begin work within defined boundaries.
Sponsor	Person or group that owns the business need, provides support, secures funding, and approves the charter.
Scope	The boundaries of what the project will and will not deliver.
Success Criteria	Measurable conditions used to judge whether the project achieved its objectives.
Assumption	A planning belief accepted as true until validated.
Constraint	A fixed limitation such as deadline, budget, policy, technology, regulation, or resource availability.
Dependency	Something the project needs from another team, supplier, system, or decision before progress can continue.
Change Control	Process for reviewing and approving changes to scope, schedule, cost, quality, or major requirements.

14. Appendix B - Reference Notes

These notes show the project-management sources used to structure this standard charter template. Remove this appendix if you do not want references in the final signed charter.

Source	How It Supports This Template	URL
Project Management Institute (PMI)	Describes the project charter as the document that formally authorizes a project and gives the project manager authority to apply organizational resources.	https://www.pmi.org/learning/library/charter-selling-project-7473
PMI Learning Library	Notes that the charter may include requirements, summary schedule, assumptions, and constraints.	https://www.pmi.org/learning/library/charter-selling-project-7473
Smartsheet	Charter forms commonly include purpose/business case, schedule, resources, costs, benefits, risks, constraints, assumptions, objectives, scope, deliverables, and stakeholders.	https://www.smartsheet.com/content/project-charter-form-template
ProjectManager.com	Frames the charter as a single reference artifact covering scope, objectives, governance, authorization, business objectives, constraints, assumptions, and success criteria.	https://www.projectmanager.co/templates/project-charter
Cleveland State University Pressbooks - Project Management	Summarizes charter components such as scope, schedule, budget, resources, risks, quality, assumptions, constraints, milestones, and stakeholders.	https://pressbooks.ulib.csuohio.edu/projectmanagement2ndedition/chapter/3-1-project-charter/