

Simplified Project Charter Template

A project charter defines the purpose, scope, and approach of a project. This simplified version provides a clear foundation for alignment, decision-making, and accountability from the start.

1. Purpose of This Tool

- ☐ Establish a shared understanding of what the project aims to achieve.
- ☐ Define roles, scope, and success measures clearly.
- ☐ Align stakeholders on priorities, risks, and resources.
- ☐ Provide a single reference document for all major decisions.
- ☐ Improve clarity, communication, and delivery outcomes.

Tip: A concise, well-written charter saves time by preventing confusion later.

2. Project Overview

Field	Details
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Project Name	
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Project Sponsor	
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Project Manager	
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Department / Function	
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Start Date	
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Target Completion Date	
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- ☐ Capture essential information before moving into project planning.

Tip: The overview sets the tone - clarity here drives project confidence.

3. Project Purpose and Objectives

Description

Summarise the main reason for this project and what success looks like.

Outline 3–5 key objectives that define the intended results.

- ☐ Ensure objectives are specific, measurable, achievable, relevant, and time-bound.

Tip: A project without clear objectives is just a list of activities.

4. Scope Definition

In Scope Out of Scope

- ☐ Clearly define what the project will and will not deliver.

Tip: Documenting exclusions is just as important as defining inclusions.

5. Key Deliverables

Deliverable Description Target Date Owner

- ☐ Include only major deliverables that define project completion.

Tip: Each deliverable should tie directly to an objective.

6. Stakeholders

Name Role Interest / Influence Communication Needs

- ☐ Identify all key stakeholders early and define engagement expectations.

Tip: Early stakeholder clarity prevents misalignment later.

7. Project Milestones

Milestone	Target Date	Status	Notes
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Project Kick-off

Phase 1 Complete

Phase 2 Complete

Final Delivery

☐ Use milestones to measure progress at major checkpoints.

Tip: Visible milestones motivate progress and support transparency.

8. Risks and Constraints

Risk / Constraint	Potential Impact	Likelihood (H/M/L)	Mitigation / Action
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☐ List known risks and constraints to support early risk management.

Tip: Recording risks at the start prevents surprises during delivery.

9. Resources and Budget

Resource Type	Description	Estimated Cost / Hours	Owner
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People

Equipment / Tools

External Services

Total Budget Estimate

☐ Outline key resources and cost expectations.

Tip: A realistic resource plan prevents future overruns.

10. Governance and Reporting

Element	Description
Decision-Making Authority	Define who can approve changes or key decisions.
Reporting Frequency	Weekly / Fortnightly / Monthly
Escalation Path	Who issues are escalated to and how they are resolved.

☐ Establish governance upfront to keep communication clear and consistent.

Tip: Defined governance avoids unnecessary delays and confusion.

11. Success Criteria

Metric / Outcome Target Measurement Method

☐ Define how project success will be measured objectively.

Tip: Clear success criteria turn subjective opinions into measurable outcomes.

12. Approval and Sign-Off

Name	Role	Signature	Date
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Project Sponsor

Project Manager

Department Head

☐ Finalise approvals before execution begins.

Tip: A signed charter confirms ownership and alignment.

How to Use This Template

Use this charter to start any small or medium-sized project. Review and update it as the project evolves to keep alignment. Combine it with the Risk & Issue Log and Action Tracker Template to maintain visibility and control throughout the project lifecycle.