**Project Name:** *Short name for project*

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| **Sponsor:** | *Who champions project?* |
| **Project Mgr:** | *Who leads the project?* |
| **Charter Version #:** | What is this version #? |
| **Updated by:**  | *Who created this version?* |
| **Approved By:** | *Who approved this version?* |
| **Approval Date:** | *When was it approved?* |

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| Project Objective Statement: |
| *What must the project do? By When? Keep this statement short --- 25 words or less. Make it SMART (Specific, Measurable, Achievable, Relevant, and Time-based.)*  |

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| Strategic Fit: |
| *How does this project support your organization’s mission or strategic objectives?* |

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| Customer/Key Stakeholders: |
| *Who is the Customer? Also list any key stakeholders whose needs must be met in order for the project to be successful* |

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| Customer Benefits: |
| *What customer business requirements does this project address? Relate these to one of the following: increase revenue, avoid costs, improve service, and/ or comply with a mandate? (Create a short numbered list of customer benefits.)* |

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| Successful Completion Criteria: |
| *How will the success of the project be determined from the customer’s perspective? Make these criteria measurable so there is no doubt as to the project’s success. (Create a short numbered list.)* |

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| Project Deliverables: |
| *What is the project going to produce? (Create a numbered list of tangible products that will be available as a result of this project.)* |

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| **Start Date:** | When did the project start? |
| **Estimated End Date:** | *When will it finish?* |

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| Triple Constraint Trade-off: |
| Cost |  |  | Select a different flexibility letter for each constraint. Flexibility letter choices are:N = Not FlexibleS = Somewhat FlexibleM = Most Flexible |
| **Schedule** |  |  |
| **Scope** |  |  |

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| **Major High-Level Milestones** |
| **Milestone** | **Planned** | **Actual** |
| 1. *What events measure progress? E.g. Initiation Approved, Analysis Complete, etc.*
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| **Project Core Team Members** |
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| **Team Member** | **Role** |
| *Who is on the project?* | *What role do they play?* |
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| Risks: |
| *What characteristics or situations could cause this project to fail? Identify those items which are outside the jurisdiction of this project and could result in a “show-stopper” to the project success. (Create a short numbered list)*  |

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| Current Issues: |
| *What immediate situations (if any) need to be brought to the attention of executive management for resolution? (Create a short numbered list)*  |

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| Project Background: |
| *What is the primary motivation for this project? Include a brief high level description of the business area, the current situation, the desired situation, and the gaps that exist.*  |

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| Dependent Projects: |
| *What projects must be underway or completed before this project can be successful? What projects depend on this one for their successful outcome?*  |

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| Project Scope: |
| **In Scope:**  | *List the business areas and functionality that will be included in this project.*  |
| **Out of scope:** | *List the business areas and functionality that will not be included in this project.*  |

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| Assumptions and Constraints: |
| *What assumptions were made in defining the project? Assumptions can affect scope, schedule, resources, stakeholders, etc. Are there constraints to the execution of the project? Constraints describe boundaries within which the project must operate.* *(Create a numbered list of assumptions and constraints.)* |

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| **Project Budget:** | How many $$ allocated? |
| **Funding Source:** | Where do they come from? |