

2.11: Developing your Charter with Scope Statement

Simple Example of a Project Charter

Identification Section

List the project name, the date of the current version of the project charter, the sponsor's name and authority, and the project manager's name.

Example:

Project Name: Rice University Computer Store Creation

Project Sponsor: Jane Ungam, Facilities Manager

Date: Jan 12, 2010

Revision: 1

Project Manager: Fred Rubens

Overview of the Project

Provide a simple but precise statement of the project.

Example: Rice University is planning to create a store to sell computer supplies.

Objective

State the objectives of the project clearly and ensure they contain a measure of how to assess whether they have been achieved. The statement should be realistic and should follow the SMART protocol:

- Specific (get into the details)
- Measurable (use quantitative language so that you know when you are finished)
- Acceptable (to stakeholders)
- Realistic (given project constraints)
- Time-based (deadlines, not durations)

Example: The objective of this project is to implement a campus store when class starts in August 2010 with enough inventory (computer supplies, such as memory sticks, mouse pads, and cables) to last through the first two weeks of classes.

Scope

Specify the scope of the project by identifying the domain or range of requirements.

Example: The scope of the Rice's school supplies store project includes the activities listed below:

1. Determine what supplies will be sold in the store.
2. Establish competitive prices for the computer supplies.
3. Source and secure supply vendors.
4. Establish marketing, procurement, operations, and any other necessary departments, schools, centres, and institutes

It is equally important to include in the scope what is not included in the project.

Example: The scope of the project does not include:

- Development of any other school store departments
- Store design or construction

Major Milestones

List all major milestones needed to ensure project completion successfully.

Example:

- All vendors selected
- Contracts or orders completed with all vendors

- Supplies delivered to the store
- Pricing determined

Major Deliverables

List and describe the major deliverables that will result from the project.

Example:

- Operations, procurement, marketing, and other teams established
- Store supplies stocked and displayed
- Store staffing completed, including work schedules
- Store operations policies, including hours of operation, established

Assumptions

Outline the assumptions made in creating the project. An assumption is a fact you are unsure of but can either confirm at a later time or are simply stating so that the project can proceed as if the statement were true.

Example:

- Only computer supplies will be sold in the store.
- Customers will be the Rice University student body and faculty.
- Rice University students will manage the project and be responsible for ongoing operations.
- A store sponsor from the university faculty or staff will be assigned to mentor students and provide oversight.
- Store hours of operation will be approved by the Rice University students or store sponsor.
- Supplier deliveries will be arranged or the store sponsor will pick them up with students.
- Students will be empowered to contact vendors for order placement and inquiries via telephone.

Constraints

Define any and all constraints on the project or those working on the project. This is an important part of the project charter. A constraint is anything that limits the range of solutions or approaches.

Example:

- Student availability to meet for project planning is limited to school hours.
- Software is not available for project planning and control.

Business Need or Opportunity (Benefits)

Provide a concise statement of the business need or opportunity that led to the creation of the project. Why was it created? What are the benefits? How does the project contribute to organizational objectives?

Example: The goal of this project is to provide income for the Rice Student Center while supplying necessary items to students and faculty at competitive prices. The school store will be a convenience to students since necessary supplies will be available on campus. This will help students learn to manage their personal supplies.

Preliminary Cost for the Project

Provide a statement indicating how the cost of the project will be defined and controlled.

Example: The procurement team will assemble a proposal based on expected costs for review by the Dean of Undergraduate Studies.

Project Risks

A risk is anything uncertain that may occur that will reduce or decrease the chances of project success.

Example:

1. There is a state election coming and the new government may change the taxation rules for private university retail outlets.
2. The cloud is changing student demand for media such as flash drives in somewhat unpredictable ways. If this happens faster than we forecast, we may be building a store that students don't need.
3. Deliveries of items, such as store shelves, will be delayed if a major hurricane occurs.

Project Charter Acceptance

Provide the names, titles, and signature lines of the individuals who will sign off on the project charter.

Project Stakeholders

Provide the key stakeholders and team members by function, name, and role.

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