

Critical Charter Elements and Questions Teams Should Consider

Project Title

“The commonly used title for the project, something that can communicate what the focus of the project is to both internal and external audiences.”

Questions to ask yourself/team

How important is the project title?

How detailed or descriptive should it be? Is the KISS method a better approach?

Can the sponsor have input/directive?

Project Sponsor

“The individual (often a manager or executive) with overall accountability for the project. The project team often reports to this individual at key project milestones. The Project Sponsor is primarily concerned with ensuring that the project delivers the agreed business benefits.”

Questions to ask yourself/team

Does my sponsor understand the project?

Does my sponsor value the benefits of the project?

Will my sponsor champion this project if I need more resources or have to make difficult decisions?

Process Owner

“The person or organization that often initiates the project, provides resources, and benefits from the benefits. The person or organization who will be responsible for the outcomes of the project after the project is complete.”

Questions to ask yourself/team

Is the project owner part of the team?

Will having the project owner on the team create difficulty if changes are needed?

Does the project owner believe in the need for the project?

Project Background/Description

“The background/environment or history in which the project takes place. The background should be written so it is understandable to someone who knows nothing about the sponsoring organization or department. It should be high level, with just a couple of sentences on each key element.”

Questions to ask yourself/team

What’s the difference between a problem statement and a description?

Who is it intended to inform? (helps reinforce who the charter is really for)

How in depth must the description be?

Is this an appropriate place to include metrics?

Problem Statement

“A brief description of the issues that need to be addressed. The problem statement should make it clear as to why the project exists.”

Questions to ask yourself/team

How do describe a problem that has more qualitative input?

What if there is not baseline data to describe the problem?

From whose perspective should the problem statement be written?

What do you do if there are differing perspectives on the problem?

How much history do you provide and how long is too long?

How do you deal with it when there is a people problem as well as a process problem?

Project Goals

“Project goals should be SMART: Specific, Measureable, Achievable, Realistic and Time-bound. SMART goals and objectives make it easy to track and measure progress and success.”

Questions to ask yourself/team

How detailed should the goal be?

How do you work with goals that are not easily measured or if there is not good baseline data?

Should charter goals ever be revised?

Do you need to identify how you will measure goals in the charter?

Who decides what the goal is? How much input to team members have or business owner?

Project Stakeholders

“Project stakeholders are entities that have an interest in a given project. These stakeholders may be inside or outside an organization which: sponsor a project, or, have an interest or a gain upon a successful completion of a project; may have a positive or negative influence in the project completion.”

Questions to ask yourself/team

How do you identify your stakeholders?

What do you do with people or groups that insert themselves as stakeholders?

What if there is disagreement on who the stakeholders are?

Team Members

“Team members are those who will be routinely contributing to the overall project goals. Subject Matter Experts may only be called upon to provide information at certain critical points in the project.”

Questions to ask yourself/team

What do you do build a team that will perform? (storm to perform)

Should the business owner or sponsor serve on the team?

How do you effectively identify/use subject matter experts?

Project Scope

“Project scope is the part of project planning that involves determining and documenting a list of specific project goals, deliverables, features, functions, tasks, deadlines, and ultimately costs. In other words, it is what needs to be achieved and the work that must be done to deliver a project.”

Questions to ask yourself/team

Why is it so critical to identify scope?

Is it possible/practical to change the scope along the way?

How do you handle important items that are out of scope?

Are there any concerns with having a very broad scope or a very limited scope?

How do you determine what's not included? Should you specify what's not included?

OTHER CRITICAL COMPONENTS

Timeline

- Who sets the timeline?
- What should be included/how detailed must the timeline be?
- How do you factor in external impacts on your deliverables? (e.g. rfp process adding to timeline; IT development)

Approval

- What if your sponsor or key stakeholders and you don't agree on charter components?
- How significant do charter changes need to be before you have to take the charter back to your sponsor for approval?