

FREE EDITABLE TEMPLATE

Project Charter Template

A sponsor-ready framework for purpose, scope, authority, resources, risks, and approval.

How to use: Replace every bracketed prompt. If something is unknown, write TBD, assign an owner, and add a decision date. Keep the charter high level; put detailed tasks and schedules in the project plan.

1. Project overview

Project name	<i>[Clear, specific project name]</i>
Charter version and date	<i>[Version] [Date]</i>
Project sponsor	<i>[Name or role authorized to approve the work]</i>
Project lead	<i>[Name or role coordinating delivery]</i>
Status	<i>[Draft / In review / Approved / Superseded]</i>

2. Purpose and objective

Purpose / business need	<i>[What problem, opportunity, or obligation justifies this project? Why now?]</i>
Measurable objective	<i>[Deliver an outcome for a defined audience by a target date or review point.]</i>

3. Success metrics

Metric	Baseline	Target	Measurement window	Owner
<i>[Metric]</i>	<i>[Current]</i>	<i>[Target]</i>	<i>[When measured]</i>	<i>[Role]</i>
<i>[Metric]</i>	<i>[Current]</i>	<i>[Target]</i>	<i>[When measured]</i>	<i>[Role]</i>

4. Scope boundaries

Name both the work that is authorized and the adjacent work that is explicitly excluded.

In scope	Why it is included / acceptance signal
[Included deliverable, product area, process, or audience]	[Boundary or acceptance note]
[Included deliverable, product area, process, or audience]	[Boundary or acceptance note]
[Included deliverable, product area, process, or audience]	[Boundary or acceptance note]
Out of scope	Where it belongs / when to revisit
[Plausible adjacent work that is not authorized]	[Future phase, separate owner, or decision gate]
[Plausible adjacent work that is not authorized]	[Future phase, separate owner, or decision gate]
[Plausible adjacent work that is not authorized]	[Future phase, separate owner, or decision gate]

5. Key deliverables

Deliverable	Owner	Acceptance / approval condition
[High-level output]	[Role]	[Evidence that it is accepted]
[High-level output]	[Role]	[Evidence that it is accepted]
[High-level output]	[Role]	[Evidence that it is accepted]
[High-level output]	[Role]	[Evidence that it is accepted]

6. Stakeholders and decision rights

Stakeholder / group	Interest or impact	Contribution / information need	Cadence
[Name or group]	[How affected]	[What they provide or need]	[When / how]
[Name or group]	[How affected]	[What they provide or need]	[When / how]
[Name or group]	[How affected]	[What they provide or need]	[When / how]
[Name or group]	[How affected]	[What they provide or need]	[When / how]

7. Roles and authority

Role	Accountability	Can decide / approve
Sponsor	[Owns authorization, funding, and material changes]	[Charter, budget, material scope changes]
Project lead	[Coordinates delivery and escalates decisions]	[Within delegated limits]
Delivery owner(s)	[Own defined outcomes or deliverables]	[Technical or operational decisions in scope]
Approver(s)	[Accept specified outputs or controls]	[Named deliverables / launch gate]

8. Milestones and decision gates

Milestone / gate	Target date or week	Owner	Exit condition
[Outcome or decision gate]	[Date / Week]	[Role]	[Evidence required to move forward]
[Outcome or decision gate]	[Date / Week]	[Role]	[Evidence required to move forward]
[Outcome or decision gate]	[Date / Week]	[Role]	[Evidence required to move forward]
[Outcome or decision gate]	[Date / Week]	[Role]	[Evidence required to move forward]

9. Budget and resources

Budget ceiling / estimate	[Amount, currency, tolerance, and approval threshold]
Team capacity	[Roles, allocation, duration, and known gaps]
Tools, vendors, equipment	[Required systems, contracts, or physical resources]
Procurement / policy limits	[Rules or approvals that constrain resource use]

10. Dependencies, assumptions, and constraints

Type	Statement	Owner	Validate / resolve by
Dependency	[External team, system, data, decision, or vendor required]	[Role]	[Date / gate]
Dependency	[External requirement]	[Role]	[Date / gate]
Assumption	[Condition believed true but not yet confirmed]	[Role]	[Date / evidence]
Constraint	[Fixed time, policy, capacity, technology, or cost limit]	[Role]	[How monitored]

11. Top risks and responses

Risk condition and impact	Owner	Response / trigger
[If condition occurs, then impact may follow]	[Role]	[Avoid, reduce, transfer, accept, or escalate]
[If condition occurs, then impact may follow]	[Role]	[Avoid, reduce, transfer, accept, or escalate]
[If condition occurs, then impact may follow]	[Role]	[Avoid, reduce, transfer, accept, or escalate]
[If condition occurs, then impact may follow]	[Role]	[Avoid, reduce, transfer, accept, or escalate]

12. Approval requirements

Approval to begin	<i>[Who authorizes initiation and resource use?]</i>
Deliverable approvals	<i>[Who accepts which outputs or controls?]</i>
Launch / handoff decision	<i>[Who makes the go / no-go decision?]</i>
Material change threshold	<i>[What change requires sponsor reapproval?]</i>

13. Approval record

Name / role	Decision	Date	Conditions / evidence
<i>[Approver]</i>	<i>[Approve / Revise / Reject]</i>	<i>[Date]</i>	<i>[Signature, comment, link, or condition]</i>
<i>[Approver]</i>	<i>[Approve / Revise / Reject]</i>	<i>[Date]</i>	<i>[Signature, comment, link, or condition]</i>
<i>[Approver]</i>	<i>[Approve / Revise / Reject]</i>	<i>[Date]</i>	<i>[Signature, comment, link, or condition]</i>

Pre-approval checklist

☐	One accountable sponsor and one named project lead are identified.
☐	The purpose explains the problem or opportunity and why it matters now.
☐	The objective states an outcome, audience, and target point.
☐	Each success metric has a baseline or baseline owner, target, and measurement window.
☐	In-scope and out-of-scope boundaries address likely misunderstandings.
☐	Stakeholders include users and teams affected after launch.
☐	Roles state decision authority, not only participation.
☐	Milestones are outcomes or gates rather than task lists.
☐	Budget, staffing, and resource limits are explicit.
☐	Dependencies, assumptions, and constraints are separated.
☐	Each top risk has an owner and practical response.
☐	Approval requirements cover initiation, key outputs, launch, and material changes.
☐	The sponsor decision, date, and conditions can be audited later.

Next step after approval: Create the detailed project plan, work breakdown, schedule, risk register, and reporting cadence around the approved objective and boundaries.