

# Project Charter Template



## Purpose

Structured document to describe the project, its objectives, why it matters and who's involved – so everyone's on the same page.

## Who this is for

- Project Leads
- Team Members (use for alignment and orientation, support tool building)

## When to use

- Proposing the Initiative
- Planning and scoping the initiative
- Considering renewal or scaling
- Researching and learning
- Throughout implementation / at key milestones

Introduction

Project Charter Template

## Introduction

### Why is this tool important?

The project charter is crucial because it formalizes the project's objectives, scope, and resources, ensuring that everyone involved – whether faculty, administration, or students – has a shared understanding of the project's direction. Clearly defining the project's goals and boundaries aligns expectations and prevents misunderstandings from the outset.

The charter also acts as a foundational document that helps secure necessary commitment and funding by outlining the project's value and feasibility. Throughout the project's lifecycle, it serves as a reliable reference point, helping to manage changes, reduce the risk of scope creep, and minimize miscommunication. In essence, the project charter is the backbone of a well-organized and successful project, ensuring that all stakeholders are on the same page and that the project stays on track from start to finish.

### Key actions

- Utilize a structured approach to define project goals, scope, and secure stakeholder commitment for alignment and support from the start
- Customize inclusion of categories according to initiative and institutional needs

## How to use this tool

This template serves as a useful guide for building a project charter document tailored to your student success initiatives. While users are not required to complete every component, reviewing all of them is essential to provide a strong foundation for your planning process. Necessary components and the order in which you approach them will vary depending on the specific project. Still, there are a few key elements that should always be considered (highlighted in green below).

The format of a project charter can range from a straightforward document to a more complex Excel sheet or even an integrated software tool. However, the content is what truly matters regarding the charter. A well-crafted charter should be short, clear, and simple to ensure you gain the buy-in from your leadership and stakeholders, which is critical for the success of your initiative.

## Project Charter Template Overview

Since every student success project and institution is unique, the importance of each component will vary. Core components, essential for any project charter regardless of size, scope, or complexity, are highlighted in green. The level of detail required will depend on the specific project. See the [Project Charter Template](#) page for more information.

<b>Purpose Statement</b> Outlines the primary goals and objectives the project intends to achieve.	<b>Needs Assessment</b> Identifies and evaluates gaps between current conditions and desired outcomes.	<b>Project Timeline</b> A visual representation of a project's chronological sequence of tasks, milestones, and deliverables.
<b>Intended Outcomes</b> The specific, desired results or changes a project aims to achieve once completed.	<b>Equity Considerations</b> Considerations for creating an equitable environment regardless of race, background, or circumstances.	<b>Key Stakeholders</b> Identifies those with vested interest in an initiative/project and are influenced or impacted by it.
<b>Project Approach &amp; Methodology</b> Provides a structured framework to plan, execute, and complete a project or initiative.	<b>Research Overview</b> A review and synthesis of existing research or institutional knowledge on a particular topic.	<b>Project Team Members &amp; Roles</b> Helps determine team roles and provide clarity of responsibilities for team members.
<b>Deliverables</b> Identifies the tangible or intangible outcomes produced from a project's activities.	<b>Funding</b> The financial resources required to complete a project or initiative, including the budget and funding.	<b>Project Resources</b> The various assets (e.g., human, technical, physical) required to complete a project successfully.
<b>Project Scope</b> Provides a framework for what will and will not be included in the project to protect against project expansion.	<b>Dependencies, Constraints, &amp; Risks</b> Helps manage the dependencies, constraints, and risks to maintain strategic control and avoid setbacks.	<b>Sustainability Plan</b> A framework for maintaining a project's benefits after completion and supporting continuous improvement.