**ADVANCED PROJECT CHARTER TEMPLATE**

GENERAL PROJECT INFORMATION

|  |  |  |
| --- | --- | --- |
| PROJECT NAME | PROJECT MANAGER | PROJECT SPONSOR |
|  |  |  |
| EMAIL | PHONE | ORGANIZATIONAL UNIT(S) |
|  |  |  |
| GREEN BELTS ASSIGNED |   |   | EXPECTED START DATE | EXPECTED COMPLETION DATE |
|  |  |  |
| BLACK BELTS ASSIGNED |   |   | EXPECTED SAVINGS | ESTIMATED COSTS |
|  |  |  |

PROJECT OVERVIEW

|  |  |
| --- | --- |
| PROBLEM OR ISSUE  |  |
| PURPOSE OF PROJECT |  |
| BUSINESS CASE |  |
| GOALS / METRICS |  |
| EXPECTED DELIVERABLES |  |

PROJECT SCOPE

|  |  |
| --- | --- |
| WITHIN SCOPE |  |
| OUTSIDE OF SCOPE |  |

TENTATIVE SCHEDULE

|  |  |  |
| --- | --- | --- |
| **KEY MILESTONE** | **START** | **FINISH** |
| Form Project Team / Preliminary Review / Scope |  |  |
| Finalize Project Plan / Charter / Kick Off |  |  |
| Define Phase |  |  |
| Measurement Phase |  |  |
| Analysis Phase |  |  |
| Improvement Phase |  |  |
| Control Phase |  |  |
| Project Summary Report and Close Out |  |  |

RESOURCES

|  |  |
| --- | --- |
| PROJECT TEAM |  |
| SUPPORT RESOURCES |  |
| SPECIAL NEEDS |  |

COSTS

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **COST TYPE** | **VENDOR / LABOR NAMES** | **RATE** | **QTY** | **AMOUNT** |
| **Labor** |  |  |  |  |
| **Labor** |  |  |  |  |
| **Labor** |  |  |  |  |
| **Labor** |  |  |  |  |
| **Labor** |  |  |  |  |
| **Supplies** |  |  |  |  |
| **Miscellaneous** |  |  |  |  |
|  |   |   | TOTAL COSTS |  |

BENEFITS AND CUSTOMERS

|  |  |
| --- | --- |
| PROCESS OWNER |  |
| KEY STAKEHOLDERS |  |
| FINAL CUSTOMER |  |
| EXPECTED BENEFITS |  |
|   |   |   |   |   |   |
| **TYPE OF BENEFIT** | **BASIS OF ESTIMATE** | **ESTIMATED BENEFIT AMOUNT** |
| **Specific Cost Savings** |  |  |
| **Enhanced Revenues** |  |  |
| **Higher Productivity (Soft)** |  |  |
| **Improved Compliance** |  |  |
| **Better Decision Making** |  |  |
| **Less Maintenance** |  |  |
| **Other Costs Avoided** |  |  |
|   |   |   | TOTAL BENEFIT |  |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

|  |  |
| --- | --- |
| RISKS |  |
| CONSTRAINTS |  |
| ASSUMPTIONS |  |
|   |   |   |   |   |   |
|   |   |   |   |   |   |
| PREPARED BY | TITLE | DATE |
|  |  |  |

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| --- |
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