



Promoting IT Efficiency

**QAIassist**  
**Blog Article**  
Project Charter

## Meet your new best friend: the "Project Charter"

The project charter has been around for as long as the concept of work.

The Egyptians used project charters to create the Pyramids. So did the Greeks to erect the Parthenon. The Romans used a project charter to create the Coliseum. Little Johnny used a project charter to construct his miniature house made of lego blocks.

As different as the times and methods used to create these structures, one common thread exists - success was based on the creation, maintenance and oversight of a project charter. The Egyptians may have created theirs with hieroglyphics in the sand, the Greeks may have chiseled theirs in Mount Olympus, the Romans may have penned theirs in Latin, and little Johnny may have used crayola on the kitchen table. The point is not how complex or sophisticated these project charters were, but rather, that one was required, prepared and relied upon to act as the cornerstone to creating all of these structures.

While academia can spend days crafting a definition of the complexities and internal dynamics of a project charter, anyone can understand it using six simple words: **"what are we trying to do?"**

Though the term project charter is routinely applied and recognized within the Information Technology (IT) industry, the concept of project charter is as applicable to organizational strategic planning, corporate budgeting and operational oversight. It is difficult to fathom a corporate president or CEO performing their roles without defining and documenting "what are we trying to do?" or a CFO maintaining fiscal control without defining and documenting "what are we trying to do?". The question of "what are we trying to do?" permeates every facet of every organization. Suffice it to say, the tenure of a CEO would not be very long if they were unable to articulate and obtain approval of "what are we trying to do?" from the shareholders.

On the surface, addressing the project charter "what are we trying to do?" question appears to be a simple exercise, be it a CEO, CFO or an IT Project Manager. In reality, it can become a very trying and taxing exercise. The amount of definition and explanation required in a project charter depends upon the magnitude and complexity of the "what are we trying to do?" question. A project charter used to document how one person should dig a hole in the ground could be documented on half a sheet of paper, while a project charter used to document how to send a space craft to the moon and back would probably require volumes of detail.

The utilization of a project charter is as varied as the number of organizations that create and apply them. In some cases the project charter is the project's cornerstone and is relied upon throughout the project. In others cases, the project charter is a project title and a brief project description. The project charter has been adapted and customized by organizations to address a myriad of needs. Here are a few contexts where the project charter is used.

### *Corporate - Project Definition*

As an initial project document, the project charter establishes the goal posts from which the project will be initiated, planned, pursued and completed. The project's definition will reflect its size and complexity. It can include the following:

- The purpose of the project

- The scope
- The objectives
- The resources (HR and otherwise) to be utilized on the project
- The plan
- The constraints
- The quality
- The cost estimate
- Project hierarchy and organization
- Risks and impacts the project will have on the organization.

The project charter is not a stagnate document, it evolves and is maintained to reflect the changing circumstances and conditions associated with the project. The project charter acts to establish the project context and boundaries to ensure all project team stakeholders and resources have a common point of reference and communication of the project throughout its duration.

#### *Corporate - Project Authorization*

The project charter gives organizational stakeholders the ability to review and evaluate priorities. Utilizing the project charter to obtain formal authorization ensures there is a correlation between the corporate strategy, planning and budgeting exercises and the organizational resources allocated to complete a project. This ensures organizational resources will remain focused on the authorized projects.

#### *Corporate - Project Scope Management*

After establishing the project context and boundaries and receiving formal authorization, the project charter can be used to monitor and evaluate the scope of the project from beginning to end. Project stakeholders are able to reference the project charter to monitor the project progress and direction in relation to the original context and boundaries they had originally approved. This affords project stakeholders the flexibility to stop, defer or accelerate IT project team priorities to better reflect organizational business needs. It also enables IT project team resources the ability to re-calibrate their efforts based on decisions and approvals of organizational stakeholders.

#### *Corporate - Formal Deliverable*

The project charter establishes an operational premise to promote structure and formal documentation. This is very important to the efficiency of IT delivery and support. This concept of structure and documentation can be leveraged by the organization to introduce quality assurance and to improve the maintenance and support of applications.

#### *Project - Planning & Oversight Benchmark*

Once authorized, the project charter can act as the basis for a project planning exercise. The Project Manager is able to reference the original definitions established and authorized in the project charter to provide greater clarity and detail on how the project will be executed. Project plans, project schedules, project resources, project budget allocations are derived from the authorized project charter.

### *Project - Team Communication*

The authorized project charter provides the mechanism the project team will rely on throughout the life of the project. It acts as the basis for the deliverables and work products identified in the project plan and project schedule. Having formal documentation prepared provides several benefits. Project development teams will have access to the necessary information to ensure project team communication is consistent and based on formal approvals - all project development team members can rely on the authorized deliverables to ensure they are working off the same page. Application support and maintenance teams have a common point of reference they can leverage to effectively maintain and incorporate new functionality into the applications.

### *Wrap Up*

Although the concept and need to create a project charter has meant different things in different environments for different audiences, its primary purpose has remained the same. Be it the Egyptians or Little Johnny, as long as the concept of work exists, success will be dependent on our ability to understand the significance of "what are we trying to do?". A project charter is the basis to help us answer that question.

*QAassist is the industry recognized benchmark in information technology (IT) methodologies for small and mid-sized business (SMB's) – including the certification and support of practitioners delivering QAassist IT Methodology solutions. Article authored by Cameron Watson – President of QAassist. Visit [QAassist's website—www.qaassist.com](http://www.qaassist.com)*