

Welcome to a brief adventure in project management.

My name is Chris Dennis and I'll be your host in learning about project charters and getting you started in making a charter.

Charters are a super helpful, super important part of initiating a new project.

Let me put it in terms of some research we did a few years ago with municipalities in Oregon:

Charters help project managers live into the three most needed skills we discovered in our research.

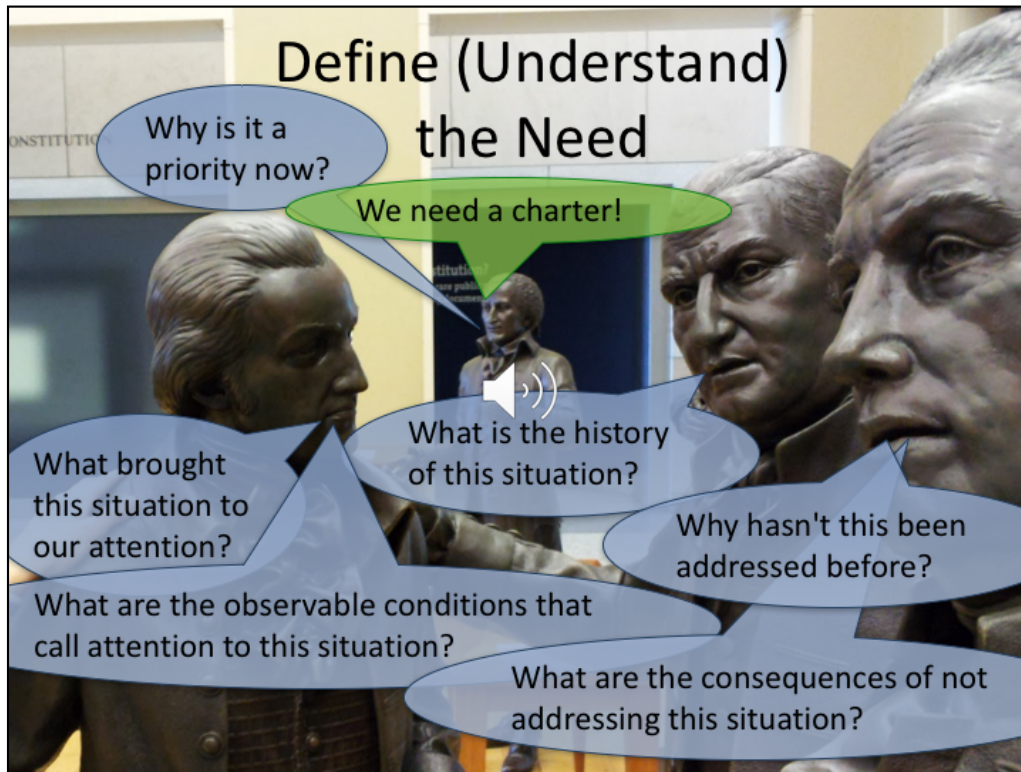
The charter helps project managers anticipate and trouble shoot surprises by inviting a proactive approach.

The charter helps project managers manage stakeholders, by creating valuable conversations early in the project life cycle.

The charter helps project managers identify goals and deliverables, by making that a primary subject of those early conversations.

CCC wall:

[http://www.centralcityconcern.org/\\_img/blog/Photo%20Oct%2022,%205%2007%2039%20PM.jpg](http://www.centralcityconcern.org/_img/blog/Photo%20Oct%2022,%205%2007%2039%20PM.jpg)



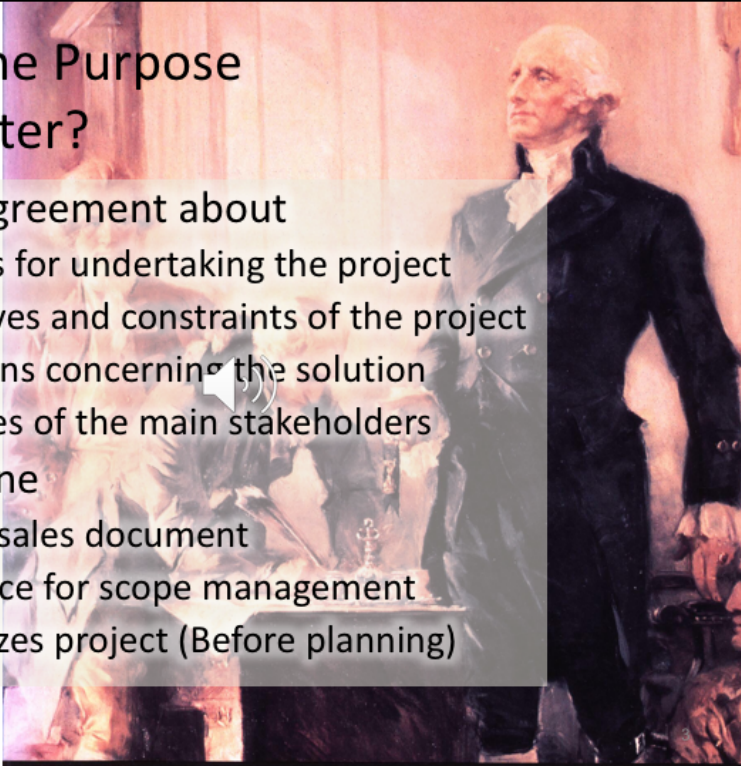
Projects arise from need. For projects to be successful, we must articulate and socialize the need.

Let's sample a few of the relevant questions:

1. Why is this issue a priority now?
2. What is the history of this situation?
3. What brought this situation to our attention?
4. Why hasn't this been addressed before?
5. What are the symptoms that call attention to this situation?
6. What are the consequences of not addressing this situation?

The charter is a home for the best answers that stakeholders can generate for these questions at the very beginning of a project.

Constitution center visit: <http://3.bp.blogspot.com/-PCXV9xkszBU/UGpE2wVZXMI/AAAAAAAAAKho/JgohPN-5YuU/s1600/2012-09-20+12.40.46.jpg>



## What's the Purpose of a Charter?

- Record agreement about
  - Reasons for undertaking the project
  - Objectives and constraints of the project
  - Directions concerning the solution
  - Identities of the main stakeholders
- Touchstone
  - Project sales document
  - Reference for scope management
  - Authorizes project (Before planning)

The charter is a project's founding document.

If that's true, a great question is: what is the purpose of a charter?

The charter is a record, it sets down the agreement between the project's primary stakeholder about:

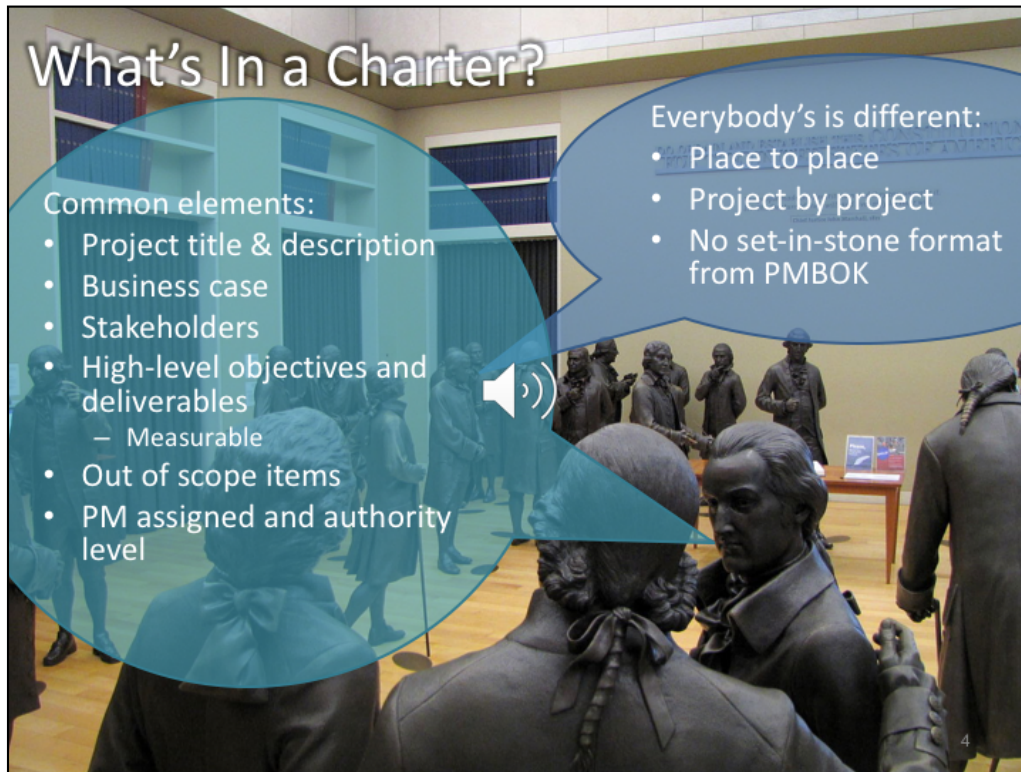
- Why we should start the project in the first place
- What the objectives of the project are and constraints that limit our actions
- What solutions we intend to pursue, assuming we understand the issues well enough to envision a solution (some project charters will authorize investigation that leads to a vision for a solution)
- The major players of the project, like the sponsor, the project manager, the primary team members, etc.

A project charter accomplishes a lot:

- It's extremely common for the project charter to go through multiple versions, and the versions serve as an evolving sales document for the project, enticing stakeholders to throw their weight behind the idea.
- It is the first frame for the scope of the project—that is the promise the project team is making to the stakeholders about how the needs of the stakeholders will be satisfied.
- And many organizations treat the charter like a contract: the project sponsor signs on the bottom line, and by so doing, agrees that the project can go forward into the planning stage.

Signing Constitution: [http://www.constitution.org/img/signing\\_1787.jpg](http://www.constitution.org/img/signing_1787.jpg)

Purpose: [http://en.wikipedia.org/wiki/Project\\_charter](http://en.wikipedia.org/wiki/Project_charter)



Now you're probably curious: what should be included in a charter?

I personally think it's a great piece of wisdom each organization's charter is typically a little different than everyone else's.

Different organizations have different needs and different approaches to projects and stakeholders, therefore their charters vary.

While some organizations try to have a standard approach to chartering, others will even use a different style of charter for different types of projects. For example, I once collaborated with a steel manufacturer who used a single-page charter for production-floor process improvements. I wrote a 30-page charter for the same company. It was so much bigger and more complicated because the project that we were chartering was a large-scale IT project with a big regulatory component.

Though project charters may vary in their format, they often share common elements, like:

- The project title and description
- Some sense of why the project is worth doing—a business case
- A short list of key stakeholders
- A set of high-level objectives and deliverables
- A list of things the project will not do—we refer to those as "out of scope items"
- Name of the project manager and what kind of authority they have, which may include fiscal authority and/or decision-making authority and/or personnel authority

Nation Constitutional center: [https://commons.wikimedia.org/wiki/File:2012-07\\_ncc\\_03.JPG](https://commons.wikimedia.org/wiki/File:2012-07_ncc_03.JPG)



In the charter I will ask you to create, I want you to include a Project Objective Statement.

It's a piece of leadership language that helps project managers rapidly communicate the essence of the project.

There is good news! The Project Objective Statement is short, just a single sentence.

Our goal is to keep it below twenty-five words.

It tells what the project will do, by when, and for how much.

Why should we spend our valuable time drafting and using a Project Objective Statement?

It summarizes the agreement between the stakeholders who are involved, and helps the project manager—and everyone else—communicate that agreement quickly.

You need an elevator speech for your project? An answer to the question "what's up?" Uses your Project Objective Statement.

Philly rainbow: [http://pneumabextra.com/images/other/scenes/p\\_s\\_rainbow-03.jpg](http://pneumabextra.com/images/other/scenes/p_s_rainbow-03.jpg)



## Example POS

- **Improved** 28 Words
  - “...this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to the earth.”
- **Refined** 20 Words
  - “Put a man on the moon and return him safely back to Earth, completed on December 31, 1969, for US \$531M”

Let's look at a famous Project Objective Statement and how we might edit the original to make it even better, at least from the perspective of the project manager.

President John F. Kennedy unveiled a pretty good one in a speech to Congress on May 25, 1961.

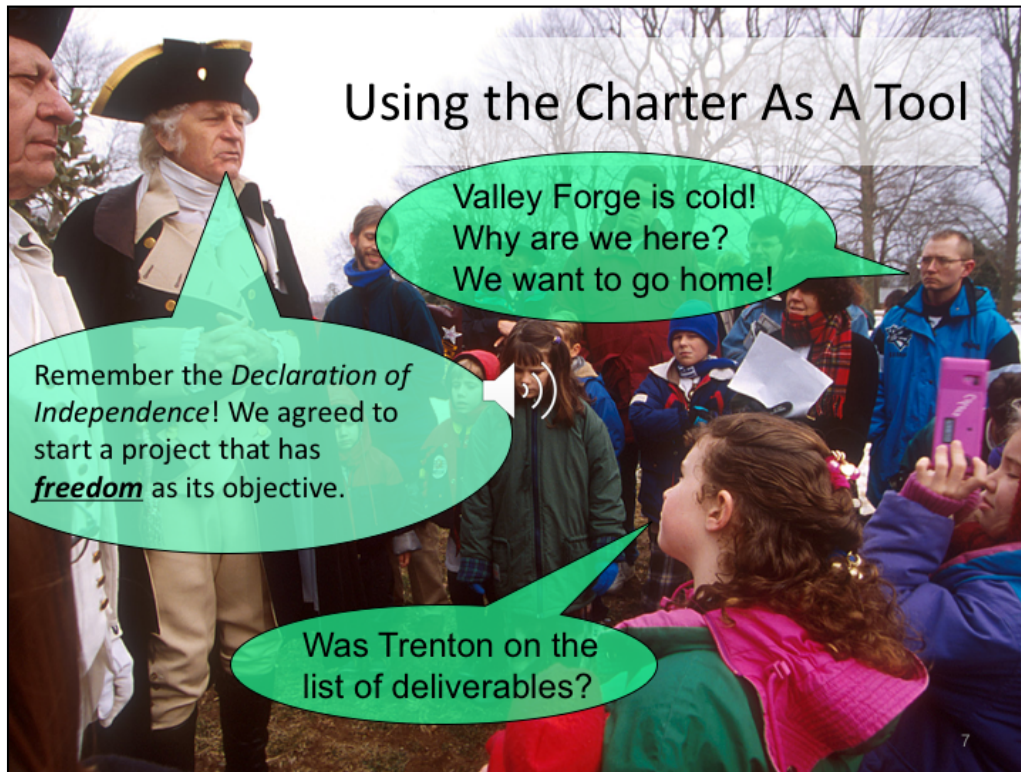
It's really pretty good. Twenty-eight words, and two decades before the idea of the Project Objective Statement appeared in print!

And! We can do better.

Consider this slightly edited version:

It may not have the same political punch, but gives stakeholders a bit clearer idea of what they've agreed to, and we've honed it down to twenty words.

Kennedy space speech:  
[http://upload.wikimedia.org/wikipedia/commons/b/bb/Kennedy\\_Giving\\_Historic\\_Speech\\_to\\_Congress\\_-\\_GPN-2000-001658.jpg](http://upload.wikimedia.org/wikipedia/commons/b/bb/Kennedy_Giving_Historic_Speech_to_Congress_-_GPN-2000-001658.jpg)



Beyond crystalizing the purpose of a project at the beginning of its lifecycle, the charter can be useful to us project managers as the project matures.

We'll get an example of one way that works from George Washington and his ragtag army wintering over in Valley Forge, Pennsylvania.

General Washington's army is getting distracted and forgetful, they are on the verge of abandoning the project:

"Valley Forge is cold! Why are we here? We want to go home!"

Fortunately, General Washington is an awesome project manager and has his charter ready to use as a motivational tool:

"Remember the *Declaration of Independence*! We agreed to start a project that has freedom as its objective."

Reminding people what they agreed to do—as well as the benefits of the project—can be a critically important function of the charter, and treating it ceremonially like a contract can increase its social weight. I always get the project sponsor, the project manager and a key customer to sign the charter if I can.

Because of when it is written and its brevity, the charter is not a perfect motivational tool, as one of Washington's army points out:

"Was Trenton on the list of deliverables? Do we have to cross the Delaware?"

The Declaration of Independence was written well before the Revolutionary Army knew enough about the situation to list Trenton as a military objective. Sigh. General Washington will have to figure out a different way to address the concerns of that stakeholder.

George Washington in Park: <http://z.about.com/d/dc/1/0/n/5/GwsBirthdayvisitors.jpg>

**Draft Your Team Project Charter**

- Download charter worksheet
  - Get something in each major area
  - Or write in “UNSURE”
- Collaborate with your team to edit and improve
- Collaboration goal:
  - Your team completes a solid draft of the charter *before* our first class meeting

An assignment for class.  
An aid for your real project.

• Time: 15 minutes

Now that you've got a better sense of what a charter is and does, you should draft one, then work with your team to create a team project charter.

Yes, this is an assignment for class. Yes, this will help you and your colleagues plan and execute an effective team project.

It's a two part assignment.

First you will draft a version of the charter for your team project.

Download the charter worksheet we've provided and try to get something in each area of the worksheet. You don't have to write paragraphs, bullet points are fine.

If you get stuck, write in a question mark or “unsure.” Then you've identified an important point for collaboration with your stakeholders.

Do your draft soon. Today, hopefully. It will take about 15 minutes.

Then you and your team (and any other stakeholders you want to include) can collaborate on a group version of the charter. Include your best ideas, and again, keep it brief. A page, maybe two. No more.

I want to be clear, you can use any charter format you like, the format of the download is just a starting place.

This collaborative work should result in a draft charter that you bring to class. Everyone should have a copy. Everyone should be prepared to speak to the charter as if they were the primary project manager.

Rider survey: <https://trimet.org/research/img/header.jpg>





## Credits

- **CCC wall:**  
[http://www.centralcityconcern.org/\\_img/blog/Photo%20Oct%2022,%205%2007%2039%20PM.jpg](http://www.centralcityconcern.org/_img/blog/Photo%20Oct%2022,%205%2007%2039%20PM.jpg)
- **Constitution center visit:** <http://3.bp.blogspot.com/-PCXV9xkszBU/UGpE2wVZXMI/AAAAAAAAAKho/JgohPN-5YuU/s1600/2012-09-20+12.40.46.jpg>
- **Signing Constitution:**  
[http://www.constitution.org/img/signing\\_1787.jpg](http://www.constitution.org/img/signing_1787.jpg)
- **Purpose:** [http://en.wikipedia.org/wiki/Project\\_charter](http://en.wikipedia.org/wiki/Project_charter)
- **Nation Constitutional center:**  
[https://commons.wikimedia.org/wiki/File:2012-07\\_ncc\\_03.JPG](https://commons.wikimedia.org/wiki/File:2012-07_ncc_03.JPG)
- **Philly rainbow:**  
[http://pneumabextra.com/images/other/scenes/p\\_s\\_rainbow-03.jpg](http://pneumabextra.com/images/other/scenes/p_s_rainbow-03.jpg)
- **Kennedy space speech:**  
[http://upload.wikimedia.org/wikipedia/commons/b/bb/Kennedy\\_Giving\\_Historic\\_Speech\\_to\\_Congress\\_-\\_GPN-2000-001658.jpg](http://upload.wikimedia.org/wikipedia/commons/b/bb/Kennedy_Giving_Historic_Speech_to_Congress_-_GPN-2000-001658.jpg)
- **George Washington in Park:**  
<http://z.about.com/d/dc/1/0/n/5/GwsBirthdayvisitors.jpg>
- **Rider survey:** <https://trimet.org/research/img/header.jpg>

9

A number of artists and photographers have made this more interesting than it would have been otherwise.

They are credited here.



The slide features a black header with the text "Steaming Kettle Consulting" in white. Below the header is a landscape photograph of a mountain range, a line of trees, and a field of golden grass. The text "think outside the office" is centered over the image, with a speaker icon below it. At the bottom, there are two columns of contact information: "Phone: 503-803-7627" and "Email: chris@steaming-kettle.com". A small number "10" is in the bottom right corner.

Steaming Kettle Consulting

think outside the office

Phone: 503-803-7627

Email: chris@steaming-kettle.com

10

If you have questions or concerns as you go along, don't hesitate to reach out, my phone and e-mail are included here.