**Project Charter Template**

**Introduction**

A project charter can help ensure that everyone is on the same page with respect to where you are going and how you will get there.

Working through these questions will give your team both focus and direction as a starting point toward meeting your goals. And while a project charter can be a useful reference throughout the lifecycle of your project – helping you re-center around your goals if you run into barriers or lose focus – you should also treat this as a living document that can be updated along the way.

Your team is encouraged to modify this template as needed to meet your needs.

**Goals and Objectives**

Goals and objectives are what the group wants/needs to accomplish during its time together. Effective goals are specific, measurable, challenging – but achievable, and accepted by the group.

* **Team goals:** Describe the issue that your team is addressing to ensure that everyone on the team has a sufficient understanding of it. Discuss the possibilities. What will it look like if the team is successful? List between one and three goals.
* **Individual goals:** Research shows that teams are strengthened when team members understand the individual developmental goals of other team members and can therefore support those goals. Share with one another, and then note, at least one goal that each member of the team hopes to accomplish throughout the year (e.g., archival research skills, coding, data collection and analysis, teamwork, project management).

**Milestones and Timeline**

It’s important to outline a timeline for the team’s work so that everyone on the team has an understanding of what the team is seeking to accomplish, by when. If it is not possible to create a detailed timeline in the beginning, it is helpful to outline major milestones and then fill in the details as the team’s work progresses. A basic table can be found below, but you may also wish to use Excel or another tool to create a more detailed plan. It’s also useful to identify who is responsible for tasks whenever possible.

|  |  |
| --- | --- |
| **MONTH 1** | **Monthly milestone(s):**   * Milestone: * Milestone: * ….. |
| **MONTH 2** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 3** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 4** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 5** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 6** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 7** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 8** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 9** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 10** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 11** | **Monthly milestone(s):**   * Milestone: * Milestone: |
| **MONTH 12** | **Monthly milestone(s):**   * Milestone: * Milestone: |

**Roles**

It is important that everyone on the team understands their role and what they are accountable for contributing. Common tasks may include: project management; literature/archival research; data collection and management; survey development and administration; case study creation; multi-media development; communications. While roles may shift over the project, consider:

* What tasks need to be completed (both project-related and administrative)?
* For each member of the team, what talents and expertise do they have? What new skills are they hoping to develop?
* How will the tasks be completed? Who will do what?

**Processes**

It’s important to create standard processes at the onset of the project to avoid gaps in communication and misunderstandings. This may include:

* When, and where, will the team meet? What are the attendance expectations?
* How will the team communicate?
* Where will the team save files and manage data?
* How will decisions be made (majority rules, consensus, or some other method)?
* How will the team track its progress?

**Team Norms**

Norms are a list of behaviors expected of team members. Norms create shared values and boundaries that define a team’s culture. If norms do not reflect what the team values, or a member violates team norms, then mistrust and conflict arises. Norms should be developed collaboratively to ensure that everyone on the team is committed to the norms. For guidance on how to facilitate this conversation as a team and examples of common team norms, please review the [Setting Team Norms document](https://bassconnections.duke.edu/sites/bassconnections.duke.edu/files/file-attachments/SettingTeamNorms.pdf).

* What norms of behavior will support your team in meeting its goals? (e.g., standards for attendance/participation, preparation, information sharing, confidentiality, decision-making, accountability, problem-solving, conflict management)
* How will the team manage violations of the agreed upon norms?

**Signature of Team Members**

***Your signature represents your commitment to your team’s goals, norms, and processes.***