



Creating a Project Charter

Putting it all together with a clear plan!



EXPLORE



DISCUSS



PLAN



CREATE



APPLY



Project Charter

- Purpose _____
- Goals _____
- Stakeholders _____
- Scope _____
- Timeline _____
- Success Criteria _____

From Idea to Action!



Grade Range

K – 5



Estimated Time

35 – 50 minutes



Key Concept

Project Charter Elements
Planning for Success



STEM Connection

Engineering Design
Real-World Planning

Teacher Overview

A project charter is a simple agreement that gives a project a clear starting point. It captures why the project matters, what the team wants to accomplish, who is involved, what the project will and will not include, and how the team will recognize success. For young learners, the emphasis is clarity and shared understanding rather than formal documentation.

Learning Objectives

- Explain the purpose of a project charter.
- Identify the essential elements of a simple project charter.
- Connect the project goal, stakeholders, team, scope, and success criteria.
- Create a kid-friendly charter that gives a team shared direction before detailed planning begins.

Penny's PM Concept

Penny says:
“Before we start building the detailed plan, our team should agree on what the project is, why it matters, who is involved, and what success looks like. Our project charter helps everyone start from the same place.”

Key Vocabulary

Word	Kid-Friendly Meaning
Project Charter	A short document that explains the project and gives the team shared direction.
Purpose	Why the project matters or why the team is doing it.
Goal	What the project is trying to accomplish.
Scope	What the project will include - and what it will not include.
Success Criteria	What the team can check to know the project achieved its goal.
Approval	Agreement that the project is ready to move forward.

Lesson Plan: Creating a Project Charter

1. Why Agree Before We Start? - 5 minutes	Ask students to imagine a team begins building a class display, but everyone thinks the project has a different goal. Discuss what could go wrong. Introduce the charter as a way to create shared understanding before detailed work begins.
2. Build the Charter Together - 8 minutes	Use a familiar project and fill in a sample charter as a class. Capture the purpose, goal, stakeholders, team, what is in scope, what is not in scope, a target completion point, and simple success criteria.
3. Scope: What's In and What's Out? - 7 minutes	Give students examples to sort. For a class reading corner, bookshelves and seating might be in scope; repainting the entire classroom might be out of scope. Explain that boundaries help teams stay focused.
4. Charter Challenge - 15 minutes	Teams use the Project Charter worksheet to define a project. Encourage concise answers. The charter should be understandable to someone who has not participated in the earlier lessons.
5. Team Agreement - 5 minutes	Teams read their charter together and answer: Do we understand the same project? Is anything unclear? Are we ready to begin detailed planning? Team members then add their names to show shared agreement.

Discussion Questions

- Why should the team agree on the project before creating a detailed plan?
- How can a clear scope keep a project from becoming too large?
- What could happen if team members have different definitions of success?
- Should a project charter ever change? What might cause the team to update it?

Student Worksheet: Our Project Charter

Project Name: _____

1. PURPOSE - WHY DOES THIS PROJECT MATTER?

2. PROJECT GOAL - WHAT WILL WE ACCOMPLISH?

3. STAKEHOLDERS - WHO SHOULD WE LISTEN TO OR CONSIDER?

4. PROJECT TEAM - WHO WILL HELP COMPLETE THE WORK?

5. SCOPE

IN: _____ **OUT:**

6. TARGET COMPLETION

We plan to complete our project by:

7. SUCCESS CRITERIA - HOW WILL WE KNOW WE SUCCEEDED?

1. _____
2. _____
3. _____

Project Charter: Team Agreement

Before moving into detailed planning, review the charter together. Every team member should understand the project and have an opportunity to ask questions.

CHARTER CHECK

- We understand why this project matters.
- We agree on the project goal.
- We identified important stakeholders.
- We know who is on the project team.
- We understand what is in scope and out of scope.
- We know how we will recognize success.
- We are ready to begin detailed planning.

Team Members:

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Reflection & Quick Assessment

Duke's Charter Check:

Before the team moves forward, ask: **Do we know why we're doing this? Do we agree on the goal? Do we understand what's included? Do we know what success looks like?**

Exit Ticket

What is the purpose of a project charter?

Name three things that belong in a simple project charter.

Why is it helpful to define what is out of scope?

Circle one: I can help create a project charter: YES / ALMOST / NOT YET

Teacher Check for Understanding

- Student can explain why a project charter is useful.
- Student can identify the major elements of a simple charter.
- Student understands the basic idea of project scope.
- Student can connect the goal and success criteria to the project's purpose.

Extension Activities

STEM Extension: Before beginning a design-and-build challenge, require teams to complete a one-page charter. Compare how clearly defined scope and success criteria influence their design choices.

Home Connection: Students create a mini-charter for a family project such as organizing a garage area, planning a meal, or preparing for a family activity.

Teacher Tip: Keep the charter concise. Its purpose is alignment, not paperwork. Students should be able to read it quickly and explain the project to someone else.

Next Resource: Plan Before You Build - introducing the importance of planning, sequencing, preparation, and thinking through the work before starting.