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| --- | --- | --- |
| 3d_blue_ad |  | chart.jpg |

**Project Charter**

<Project Name>

Author: <Name>

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# Introduction

## Purpose of This Document

The Project Charter is to clarify and define the project mandate. This document will be used by the project team to provide a baseline to measure project progress and provides the basis for all future project activities and direction the project will follow.

The Project Charter is approved by the Project Sponsor and provides the project manager with the authority to apply College resources to project activities.

# Project Purpose

## Business Problem/Opportunity

Describe the business reason(s) for initiating the project, specifically stating the business problem/needs

<Start typing here>

## Planned Outcomes

Describe the project at a high level. Identify the focus, intent, and outcome of the project.

<Start typing here>

## Project Objectives

List the key objectives the project is intended to meet. Other words for objectives are purpose, goal or target. Objectives are statements that describe what the project is going to achieve. Good objectives are SMART - Specific, Measurable, Achievable, Results-oriented and Time-bound. Examples

* To deliver new accounts payable and receivable, reducing financial processing by 30%
* To provide a new customer complaints service to enable customers to enter complaints on-line and receive response within 24 hours
* To relocate existing technology infrastructure at the new building within 2 days elapsed time and no impact on customer service delivery

|  |  |  |
| --- | --- | --- |
| Goal  | Owner | Priority[[1]](#footnote-1) |
| Objective 1 |  | H | M | L |
| Objective 2 |  | H | M | L |
| Objective 3 |  | H | M | L |

## Critical Success Factors

Factors usually related to project execution rather than outcomes, by which the project success will also be judged. If project objectives are achieved but the critical success factors have not been met, the project may still be judged to be a failure. Examples – Project schedule and quality have priority above cost. Project team must be fully competent with managing the new system by project completion.

<Insert critical success factor>

# Scope Definition

Describe the project scope. The scope establishes the boundaries of the project and identifies the products and/or services delivered by the project. For larger projects, this description is high level and there should be a reference to a more detailed scope description in the Project Management Plan.

|  |
| --- |
|  In Scope |
| **#** | **Description**  | **Owner** |
| D01  |  |  |
| D02 |  |  |

|  |
| --- |
| Out of Scope  |
| **#** | **Description**  |
| 1 |  |
| 2 |  |

# Assumptions/Constraints/Dependencies/Risks

## Assumptions

Describe any project assumptions related to business, technology, resources, scope, expectations, or schedules

1. Insert Assumptions

## Constraints

Provide a list of any known restrictions or limitations placed on the project. These items may require specific management strategies. It is understood that this list is subject to change as the project evolves through planning and execution.

1. Insert constraints

## Dependencies

Provide a list of any known project dependencies. Such as whether a project expects a deliverable from this project, or whether this project expects a deliverable from a related project. Identify the dependency and associated dates (if known)

1. Insert dependencies

## Risks

Th initial risk assessment does not replace the full risk assessment conducted during the plan stage. Identify all risks that have been identified at the start of the project. A risk is something that may happen and if it does, will have a positive or negative impact on the project

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk | Impact(H/M/L)  | Likelihood(H/M/L) | Mitigation Strategy | Owner |
|  |  |  |  |  |
|  |  |  |  |  |

# Approach and Deliverables

## Project Approach and Methodology

Identify the approach for performing the work. For example, agile versus waterfall development, outsourcing plans, creation of various testing environments etc.

<Insert details>

## Procurement Approach

Define the means that will be used in procuring services/software i.e. developing a procurement plan, engaging with those involved in procurement for the College.

<Insert details>

## Key Deliverables

Following are key deliverables for each stage

| Stage | Key Deliverables  |
| --- | --- |
| **Define** |  |
| **Plan**  |  |
| **Execute** |  |
| **Close-Out** |  |

# Budget and Plan

## Budget

Provide the source of funding, and an estimation of project costs that are known at the time of initiation. List any assumptions pertaining to the budget. It is understood that this can change as the project evolves through planning and execution, and that budget will be tracked and managed accordingly. If no budget expected identify accordingly

|  |
| --- |
| Preliminary Cost Estimates (k)Costs estimates at Define stage are +25/-10% |
| **Implementation Costs**  | **FY\_\_** | **FY\_\_** | **FY\_\_** | **Total**  | **Comments** |
| Staff | $0 | $0 | $0 |  |  |
| Hardware  | $0 | $0 | $0 |  |  |
| Software Licensing  | $0 | $0 | $0 |  |  |
| Documentation & Training | $0 | $0 | $0 |  |  |
| Professional Services  | $0 | $0 | $0 |  |  |
| Other  | $0 | $0 | $0 |  |  |
| **Total Implementation:**  | **$0** | **$0** | **$0** |  |  |
| **Ongoing Operational Expenses**  |
| Staff | $0 | $0 | $0 |  |  |
| Hardware & Software  | $0 | $0 | $0 |  |  |
| Other  |  |  |  |  |  |
| **Total Ongoing:**  | **$0** | **$0** | **$0** |  |  |
|  |  |  |  |  |  |

## High Level Project Plan

Milestones target dates are estimates only and are subject to revision as requirements are more completely defined and understood in the plan stage.

| Stage | Milestone  | Target Date |
| --- | --- | --- |
| **Define** | * Project Charter created

**Gate 2 - Project Charter Sign off** |  |
| **Plan**  | * Complete analysis (as per SDLC)
* Conduct procurement
* Project schedule creation/ finalize resource requirements

**Gate 3 – Project Management Plan Sign off** |  |
| **Execute** | * Design (As per SDLC)
* Develop (As per SDLC)
* User Acceptance Testing (as per SDLC)

**Gate 4 - UAT Summary signed off - Approval to move to production** * Launch Date
 |  |
| **Close-Out** | * Warranty Period
* Transition to Operations

**Gate 5 - Project Close Report Sign off**  |  |
| **Post Review**  | * Benefits Realization

**Gate 6 – Post Project benefits realization review** |  |

# Organizational Impacts

## Stakeholders

*A stakeholder is any person, group, or organization who have a vested interest in the project or the outcome or can influence the project and its outcome.*

|  |  |  |
| --- | --- | --- |
| Group/Department  | Individuals | Interest |
|  |  |  |
|  |  |  |

## Services/Systems

*Identify any services and/or systems that will be impacted by this project*

|  |  |
| --- | --- |
| System/Application Name  | Description of Impact |
|  |  |
|  |  |

# Project Organization

##  Project Oversight Authority

Describe management control over the project (e.g. project team composition, working group or steering committee composition, etc.). Describe external oversight bodies and relevant policies that may affect the project.

|  |  |  |
| --- | --- | --- |
| Project Role  | Person  | Responsibilities |
| **Executive Sponsor** | **<Name>** | VP sponsor required for large and very large projects * Overall project owner and champion
 |
| **Sponsor**  | **<Name>** | * Approves the Project Charter, project management plan and signs off on closure of the project.
* Approves changes to plan, scope or timeline per the change management plan
* Works with project manager to resolves issues, problems, conflicts; removes obstacles
* Makes decisions based on information provided by the project team to keep the project moving forward
* Active in identifying stakeholders
* Acts as a vocal and visible champion for the project
* May deliver key project communications
* Attends Steering Committee meetings
* Receives and reviews project status reports
 |
| **Steering Committee** | **<Name>** | Required for large and above projects identified as having major college impact, spanning multiple departments* Provides guidance on overall project direction
* Represents their constituents for policy level and other major project decisions
* Serves as a vocal and visible project champion throughout their respective organization
* Commits departmental resources
* Approves major funding and resource allocation, strategies, and significant changes to funding / resource allocation
* Makes decisions based on information provided by the project team and business insights to keep the project moving forward
* Provides direction to the project manager
* Meeting routinely at Steering Committee meetings re: project status / issues
 |

## Project Team

*Describe who is doing what for the project. It includes a listing of each person involved and what role each will play. Including the amount of time required.*

Appendix C provides definitions of the role

|  |  |  |  |
| --- | --- | --- | --- |
| Role  | Person  | Dates Required | Effort (days) |
| **<Role>** | **<Name>** | mm-dd-yy to mm-dd-yy |  |
| **<Role>** | **<Names>** | mm-dd-yy to mm-dd-yy |  |
| **<Role>** | **<Names>** | mm-dd-yy to mm-dd-yy |  |
| **<Role>** | **<Names>** | mm-dd-yy to mm-dd-yy |  |
| **<Role>** | **<Names>** | mm-dd-yy to mm-dd-yy |  |

|  |  |
| --- | --- |
| **Total IT Effort**  |  |
| **Total Functional Effort**  |  |

# Appendix A - Document History

## Sign Off

This charter formally authorizes the project*,* and indicates an understanding and agreement of the purpose of the project, parameters outlined and the information known at this time. It is understood that some of this information may change during planning and execution and, if so, will be discussed and documented through proper project change management processes.

By signing below, the identified individuals agree work should be initiated and authorizes the project manager to proceed with forming the project team and kickoff

|  |  |  |
| --- | --- | --- |
| Date | Signature | Approver Name & Title |
|  |  | Project Sponsor |
|  |  | Project Manager  |
|  |  |  |

## Participants

The following resources were included in the process to define this document

|  |  |  |
| --- | --- | --- |
| Date  | Signature | Approver Name & Title |
|  |  |  |
|  |  |  |

## Major Revisions

Identify each published version. Prior to approval the document should be versioned as 0.n. After approval, versioning should be changes to 1.0.

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Modified By | Description |
|  |  |  |  |
|  |  |  |  |

## Referenced Documentation

The following documentation was referenced

|  |  |
| --- | --- |
| Document Name  | Location  |
|  |  |
|  |  |

# Appendix B – Glossary

|  |  |  |  |
| --- | --- | --- | --- |
| **Term** | **Definition** | **Aliases** | **Related Terms** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Term Definition Aliases Related Terms

# Appendix C – Project Team Roles and Responsibilities

The role of the project team is to produce project deliverables which are in accordance with the specifications and within the planned budget, resource commitments and time frame. The project team members report to the project manager for work directly related to the project. Responsibilities include

* Understand and adhere to project plan
* Achieve resource schedules and commitments
* Review and understand work commitments
* Provide feedback on factors impacting work
* Produce documented deliverables
* Assist with project planning

Specific responsibilities are assigned to the following roles within the project team

|  |  |
| --- | --- |
| Role  | Responsibilities  |
| **Project Manager** | * Responsible for the project with regard to time, budget and quality, and facilitates the completion of the project.
* Develops the Project Charter and Project Management Plan (e.g., risk management plan, communication plan, etc.)
* Manages the project budget, schedule, scope, deliverables, risks; and changes to any of these
* Staff project with support from the Resource managers and project sponsor
* Leads and coordinate activities of the project team to meet project objectives
* Provides progress performance reports to PPO and stakeholders
* Serves as liaison to the Steering Committee & Project Sponsor
* Addresses issues and escalates, as necessary
* Supervises consultant(s) and vendor(s)
 |
| **Team Lead**  | * Assigned to lead & represent the functional business area on the project, act as a single point of contact for the Project Manager & provide direction to the team members in their areas of responsibility.
* Understands the user needs and business processes of their area
* Act as consumer advocate in representing their area
* Communicate project goals, status, and progress throughout the project to personnel in their area
* Review and approve project deliverables for their area
* Creates or helps create work product
* Coordinates participation of work groups, individuals, and stakeholders
* Provide knowledge and recommendations
* Helps identify and remove project barriers
* Assure quality of products that will meet the project goals and objectives
* Identify risks, issues, and their associated resolutions
 |
| **Subject Matter Experts (SMEs)** | * Individual assigned to the project that has an in depth understanding of the process/system within the project domain.
* Share their in-depth understanding of the business and system processes
* Provide business expertise on the system functionality related to their job functions
* Participate actively in all phases of the project including planning and analysis, design, development, testing and implementation, related to their area of expertise
* Identify test cases and perform user acceptance testing
 |
| **Technical Resource** | * ITS resources assigned to perform project tasks
* Consult with members of the project team to analyze operational procedures, which may include analyze, design, test, and implement enhancements to complex production information systems
* Design programs, forms, reports, and interfaces
* Create innovative software applications from scratch using state-of-the-art languages, protocols, and software methodologies
* Perform unit testing on programs, forms, reports, and interfaces
* Create and maintain technical documentation on computer-based information systems
* Update systems data and prepare conversion requirements
* Provide assistance to users with software-related issues or problems.
 |
| **External Resource** | External resources/Vendors participating in the project. <Identify responsibilities as required> |

# <Appendix D> – <Supporting Information>

When adding supporting information, make each appendix a Heading 1.

1. Priority H – Must Have, M – preferred, but negotiable, L – nice to have [↑](#footnote-ref-1)