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| [PROJECT NAME] Project Charter |
| Prepared by: [Project Manager] |

# Purpose of the Project Charter

The purpose of the Project Charter is to identify and record all of the necessary information needed to launch and complete the project.

# Project Name

*Enter the official name of the project. This should be the name used in all project documentation.*

# Project Sponsor

*Enter the name of the Business Sponsor(s) as well as the department and campus they represent. This may be copied from the project proposal.*

# Project Scope

## Project Description

*This section presents a high-level look of the project that captures its intended outcome and deliverables. It should include information on how it ties to the organization’s strategic initiatives, if applicable. This may be copied from the project proposal.*

## Preliminary Understanding of Business Need

*This section contains a high level statement of the business need being addressed by this project. It also includes information about predetermined data needs and any specific problem or project justification statements. This may be copied from the project proposal.*

## Project Deliverables and Objectives

*This is a high level statement of what will be delivered as a result of this project. It should be understood by all that this may change as a result of analysis.*

|  |  |  |
| --- | --- | --- |
| **Objective** | **Owner** | **Measure of Success** |
| *Desired deliverable or outcome.* | *Indiviual responsible.* | *Metric used to determine if the desired deliverable or outcome is achived.* |
| *Additoinal deliverable or outcome.* |  |  |

## Project high level deliverables

## In Scope

*This section lists the items that are to be included in this project.*

* Example item 1 (replace with your own item).
* Example item 2 (replace with your own item).
* …

## Out of Scope

*This section lists the items that are not included in this project.*

* Example item 1 (replace with your own item).
* Example item 2 (replace with your own item).
* …

# Work and Project Process Description

## Preliminary Description of Work

*This is a high level statement of the work that is required to complete this project.*

*This is your overview and first thoughts on what the Work Breakdown Structure (WBS) may look like. Indicate what big tasks will need to happen and in what order. For instance: Are you going to have an extensive requirements gathering process with focus groups first? Are you going to iteratively design the solution? What testing process will you go through? Requirements first, then divide work into 4 week phases, if required.*

## Project Processes

*This section describes the project oriented processes that will be performed. This includes items such as-document storage locations, meetings, status reports, issue tracking, time entry, etc. Think about the following questions:*

* *What will you use for project planning, tracking, and time reporting? Examples include: Clarity, BaseCamp, and MS Project.*
* *Where will you store project materials, documentation and artifacts? Examples include: Wiki, sharepoint, file shares, box*
* *Document other processes to consider such as: Status Reporting, Sponsor Meetings, Etc, Issue Tracking, Time Entry, Communications (if not in a separate Communication Plan) etc.*

## Change Management

*Document the change management process here. A sample process for your reference is documented below.*

Once the project charter is approved and the project planning is underway, all changes to project scope and any significant changes to project budget and schedule must go through the change management process:

1. Change Request form completed in SharePoint or information sent to project manager.
2. Project manager enters data into Change Request tracking system within SharePoint.
3. Project manager works with project team members to assess impact on budget and schedule.
4. Project manager consults with sponsor and either approves or denies the change request.

# Known Risks

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Risk | Risk Description | Impact –low, medium, high and note what is impacted (budget, schedule, scope) | Likelihood of Occurrence | Mitigation and Contingency Plan | Owner and Trigger |
|  |  |  |  |  |  |
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**Impact and Dependencies and Assumptions**

### Impact:

*List any systems or interfaces impacted by this project.*

### Dependencies:

*List any dependencies for this project. This could include hardware, software, and other project or resource dependencies, RFP/Purchasing processes, other processes, external vendors, external groups, testing resources etc.*

### Assumptions

*List assumptions being made that impact this project. Include major assumptions about the timeline (that we can wait to start this, or that it has to be done before Fall), Resource availability (that the required resources will be made available to the project), costs that the department will pay for materials or licenses, and departmentally provisioned resources for this project. Assumptions are items that if changed will impact the budget, timeline, or scope of this project.*

# Initial Project Team

The project team is identified below. Those identified as the lead will be responsible for reporting the status for their area of responsibility. The table below has sample data for your refrence; please add your own roles as needed.

| **Role** | **Resource** | **Responsibility** |
| --- | --- | --- |
| **Project Sponsor** | *Name of individual.* | Provide direction for project |
| **Stakeholder Committee** | *Name of all individuals in stakeholder group.* | Provide feedback from their unit |
| **Project Manager** | *Name of individual.* | Lead team in completion of project tasks |
| **Application Support** | *Name of individual.* (lead)  *Name of individual.* | Upgrade the application and infrastructure |
| **Database** | *Name of individual or individuals.* | Upgrade of the database and any database tasks during the project |
| **Reporting** | *Name of individual.* (lead)  *Name of individual.* | Transition of reporting |
| **Deployment** | *Name of individual or individuals.* | Coordinating the rollout of the upgrade |
| **Testing** | *Name of individual.* | Testing the functionality of the application |
| **Functional Admin Testing** | *Name of individual or individuals.* | Initial testing of application and learning the upgrade process |

**Preliminary Estimate of Project Size**

*This is the initial estimate that is based upon the project proposal. List all hours, by area, estimated for this project. This may be copied from the project proposal. However, this estimate should be the best guess at the time of filling out the charter & may not necessarily match what is listed in the project proposal. Detailed estimates will be coming at a later date from the project plan. The table below is provided with sample data; please modify the data below to fit your project.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task   \   Resource | IT | Other Dept | Vendor | Totals |
| Project Administration | 40 | 10 | 10 | 60 |
| Gather Requirements | 40 | 30 | 30 | 100 |
| Research Alternatives |  |  |  | - |
| Process RFP |  |  |  | - |
| Develop Application | 100 | 20 | 60 | 180 |
| Test Application | 30 | 10 | 30 | 70 |
| Document Application | 10 | 5 | 10 | 25 |
| Train Staff | 8 | 2 | 8 | 18 |
| Communicate Changes | 4 | 2 | 4 | 10 |
| Deploy Application | 50 | 5 | 25 | 80 |
| Post-Implementation | 20 | 5 | 20 | 45 |
| Annual Maintenance per year |  |  |  | - |
| Total Project Hours | **302** | **89** | **197** | **588** |

**Preliminary Cost Benefit Analysis**

*This is high-level information about the benefit that this project will bring. This might include items such as costs savings or service improvements. This may be copied from the project proposal.*

# Agreement

*The following section outlines the individuals needed for review and approval of the project charter. If a response is not received by the review date indicated we will assume the individual has reviewed and accepted the project charter as written.*

| **Role** | **Name** | **Approve or Review** | **Review Date** |
| --- | --- | --- | --- |
| **Project Sponsor** | Name of individual. | Approve |  |
| **Project Manager** | Name of individual. | Review |  |

# Revision History

| **Date** | **Version** | **Description** | **Author** |
| --- | --- | --- | --- |
| **29 November 2010** | 0.5 | Initial Creation | Name of individual. |