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Description automatically generated

**[Project Name]**

**Project Charter**

[Month & Year]

Version [x.x]

|  |  |  |  |
| --- | --- | --- | --- |
| Version Number | Description | Author | Date |
| 0.1 | Initial Charter Draft |  |  |
| 1.0 | Charter |  |  |
|  |  |  |  |
|  |  |  |  |

*Agreement with this Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work should be initiated on this project and necessary resources will be committed as described herein.*

**Approvals:**

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

|  |  |
| --- | --- |
| **Completion Date** | *[date]* |
| **Project Name** | *[Project Name]* |
| **Sponsor(s)** | *[name(s)]* |
| **Project Lead(s)** | *[name(s)]* |
| **PMO Project Manager** | *[name(s)]* |
| **Team Members** | *[name(s) & role]* |
| **Primary Stakeholders** | *[name(s) of individuals or groups impacted] \*does not have to be all inclusive as planning will likely identify additional stakeholders* |

1. Business Case

*This section describes the purpose and justification of the project in the form of business case and objectives. The business case should provide the reasoning behind the need for this project as it relates to a function of the business.*

*Discuss the logic for the Business Need/Case (market demand, organizational need, customer request, technological advance, legal requirement, ecological impacts, social need, etc). This section should also include the intended effects of the business case (i.e. cost savings, process improvement, new product development, etc).*

Scope: What are we doing?

*This section should list the Business Objectives for the project which should support the organizational strategic plan.*

In Scope *– the following are the minimum requirements that are in scope for this project:*

* *[objective 1]*
* *[objective 2]*
* *[objective 3]*

Out of Scope *– Example - Operational or Business as Usual activities are out of scope for this project. Any changes to the scope of the project will be processed through a project change control / governance process. The project sponsor(s) will act as a Change Control Board for the project.*

1. Measuring Success: How do we know we’re done?

*Objectives should be SMART: Specific, Measurable, Attainable, Realistic, and Time-bound. The project manager must be able to track these objectives in order to determine if the project is on the path to success. Vague, confusing, and unrealistic objectives make it difficult to measure progress and success.*

* *[measurement of success 1]*
* *[measurement of success 2]*
* *[measurement of success 3]*

1. Communication Plan

*Example - The Project Manager (PM) will be the central point of contact for the project. The PM will deliver an inclusive communications plan during the planning phase of the project. However, the PM will implement the below communications strategy.*

* Establish MS Teams Channel and document repository for the project
* Enable MS Teams direct messaging for team
* Initiate a PM Workbook with the following logs:
  + Stakeholder register
  + Risk Register
  + Action log
  + Issue log
  + Dependency log
  + Decision log
  + Change control log
* Execute a Project Kickoff with all identified stakeholders
* Update stakeholders routinely via status reports
* Update to PMO project documentation

1. Change Management Process

Example - Any changes to the scope and deliverables of this project will require a written change request, including the business reasons for the change and the impact they have on the scope, cost, and timeline of the project. Any changes should be processed through the PM. The project sponsor will evaluate and approve these requests.

1. Known Risks

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **RISK** | **PROBABILITY**  1-5 | **IMPACT**  1-5 | **SCORE**  P \* I | **ACTION**  Accept, Avoid, Mitigate, Transfer |
| *1* | *Example - Failure to identify workable solutions will result in functionality issues and delays* | *3* | *4* | *12* | *Mitigate - Rigorous discovery and testing* |
| *2* | *Example - Change resistance and pushback from users* | *4* | *3* | *12* | *Mitigate - Develop change strategy; employ change partner for support* |
| *3* | *Example - Potential interruption in CSUP systems impacting users and security* | *3* | *5* | *15* | *Mitigate - Rigorous testing* |
| *4* | *Example - Limited resources create delays and quality risks to project* | *4* | *4* | *16* | *Mitigate - Identify dependencies and resource constraints; align effort with other projects and operations* |
| *5* | *Example - Poor quality can lead to latency issues* | *3* | *4* | *12* | *Mitigate - Rigorous testing* |
| *6* | *Example - Personnel changes lead to loss of institutional knowledge and delays or quality risks.* | *4* | *4* | *16* | *Mitigate - Ensure rigorous documentation and effective communications* |
| *7* | *Example -Scope creep lead to gold-plating and delays* | *3* | *3* | *9* | *Mitigate - Change control process* |

1. Milestones

*This section provides an estimated schedule of all high-level project milestones. It is understood that this is an estimate and will surely change as the project moves forward and the tasks and milestones and their associated requirements are more clearly defined.*

*Example - The project Summary Milestone Schedule is presented below. As requirements are more clearly defined this schedule may be modified. Any changes will be communicated through project status meetings by the project manager.*

|  |  |
| --- | --- |
| **Item** | **Target Completion Date**  **\*Estimates only, dates may change after planning commences** |
| Example - Finalize Project Charter | February 2024 |
| Complete Solution Design | March 2024 |
| Acquire Hardware and Software | April 2024 |
| Complete Solution Simulation with New Hardware/Software | May 2024 |
| Complete Solution Simulation and Testing | May 2024 |
| Deploy Solution | May 2024 |
| Project Complete | June 2024 |

VI. Summary Budget

*The summary budget should contain general cost components and their planned costs. As the project moves forward these costs may change as all tasks and requirements become clearer. Any changes must be communicated by the project manager. If unknown, this section can be removed or listed as to be determined (TBD).*

|  |  |
| --- | --- |
| **Summary Budget – List component project costs** | |
| **Project Component** | **Component Cost** |
| 1. Personnel Resources | $110,000 |
| * Hardware | $45,000 |
| 1. Software and Licensing | $75,000 |
| 1. IT Lab Preparation | $15,000 |
| **Total** | **$245,000** |