

|  |  |  |
| --- | --- | --- |
|  |  |  |

[Project Name]

**Project Charter**

|  |  |
| --- | --- |
| **Prepared By:** | [Name(s) of Preparer(s)] |
| **Version:** | [Version Number #.#] |
| **Date:**  | [Date] |
| **Requestor:** | [Name & Title of Requestor][Department] |
| **Process Initiator:** | [Name of Process Initiator][Department][Contact Information] |

|  |  |
| --- | --- |
| **Status:** | **[x]  Draft** |
|  | **[ ]  Routing for Document Approval** |
|  | **[ ]  Approved** |
|  | **[ ]  Unapproved** |

Table of Contents

Revision History 3

1 Business Needs & Objectives 4

1.1 Business Need 4

1.2 Business Goals/Objectives 4

1.3 Business Stakeholders 4

2 Business Requirements (if documented elsewhere, delete this section) 4

2.1 Solution Functionality Requirements 4

2.2 Reporting & Notification 4

3 Proposed Solution Overview 4

3.1 Description of Proposed Solution 4

3.2 Alternative Solutions 5

3.3 Scope 5

3.3.1 In Scope & Deliverables 5

3.3.2 Out of Scope 5

3.4 Critical Success Factors 5

3.5 Assumptions 5

3.6 Constraints 5

3.7 Risks 5

3.8 Dependencies 5

3.9 Hardware, Software and Process Additions or Modifications (if applicable) 5

3.9.1 Hardware 5

3.9.2 Software 5

3.9.3 Process 5

4 Project Organization 5

4.1 Governance 5

4.1.1 Project Escalation Procedure 6

4.2 Required Project Resources *(\*If a Roles & Responsibilities document exists, this section should simply reference the existing document)* 6

4.3 Proposed Major Milestones 7

5 Funding 7

5.1 Estimated Costs / Budget Required 7

5.2 Source of Funding & Timing 7

6 Business Case *(\*If a business proposal exists, this section should simply reference the existing document)* 8

6.1 Cost Benefit Analysis 8

6.1.1 Qualitative 8

6.1.2 Quantitative 8

6.1.3 Comparative Analysis 8

7 Proposal Approval 9

8 Appendix A – Related Documents 10

9 Appendix B – Glossary 11

# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version Number** | **Date**  | **Author** | **Notes** |
| \* |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

\*Begin revision history after first, non-draft release.

**Proposal Contributors**

* Name, Title
* Name, Title

***Purpose / Instructions:*** *The purpose of this document is to outline the business objectives, baseline the scope and deliverables for the project, detail the proposed solution(s) in a manner which is digestible by the key stakeholders, and provide enough information to allow a project manager to begin the Planning, Analysis and Design phase. The Process Initiator will work with involved organizations to document sufficient detail through which a decision whether or not to charter a project can be made. The instructions in this document are the italicized paragraphs and are meant to be deleted once they are no longer needed.*

# Business Needs & Objectives

*<Provide a description of the detailed business need addressed by this proposal, affected stakeholders, and anticipated outcomes from implementation.>*

## Business Need

*<Provide a high-level description of the goals and objectives of the proposal.>*

## Business Goals/Objectives

*<Describe any measurable outcomes which have been defined by the project champion, executive sponsor or stakeholders as success criteria.>*

## Business Stakeholders

*< List the various stakeholder groups that will be impacted by the end result of this effort, and how they will be impacted.>*

# Business Requirements (if documented elsewhere, delete this section)

*<If not utilizing a separate Business Requirements Document, use this section to detail the business requirements in a sufficient manner for design and development of the chartered solution. It is important that the business requirements be detailed enough to not only implement the change, but to also test that each of the business requirements have been met.>*

## Solution Functionality Requirements

*<Describe WHAT the end users expect as a result of the solution. Be as specific as possible and break the requirements down into single actionable line items. However, you don’t necessarily need to detail HOW, as that is determined during the Analysis, Design & Development phase as a result of the Business Requirements .>*

## Reporting & Notification

*<Describe in detail the type of reporting expected from the solution. Also describe any notifications required of the solution.*

# Proposed Solution Overview

*< Detail the key components of the proposed solution. .>*

## Description of Proposed Solution

*<Provide an overview description of the business need and scope of the proposed solution. >*

## Alternative Solutions

*<Provide an overview description of the business need and scope of any alternative solutions examined.>*

## Scope

*<Describe the boundaries of the project by detailing the inclusions and deliverables as well as related issues which are clearly understood to be out of the scope of this project.>*

### In Scope & Deliverables

### Out of Scope

## Critical Success Factors

*<List the various outcomes, which if achieved to the satisfaction of the customers and/or stakeholders, would be deemed, successful.>>*

## Assumptions

*<Detail any project assumptions related to the project including any related to budget, schedules, resources, technology, scope or expectations.>*

## Constraints

*<Detail any project constraints including any related to budget, schedules, or resources.>*

## Risks

*<If any risks are known at the outset of the project, they can be listed here. Otherwise, if a separate Risk Management Log exist, this section should simply reference the existing document.>*

## Dependencies

*<List any known dependencies that need to be completed before specific milestones related to this project can be completed.>*

## Hardware, Software and Process Additions or Modifications (if applicable)

*<Detail the modifications or additions required to hardware, software and processes in order to implement the requested project. Delete sections not needed.>*

### Hardware

### Software

### Process

# Project Organization

## Governance

*<Describe the methodology to be utilized for this project, including any oversight committees and their roles. Specify whether the project will follow PMLC or variant and provide a link to a summary of the PMLC. Include executive sponsors. (Sample default text is provided)>*

This project will follow the PMLC process as defined by [Roles & Responsibilities](http://bmag.ucdavis.edu/pmlc/section/roles-responsibilities.html). For more information, you can find documentation in the [PMLC Phase Page](http://bmag.ucdavis.edu/pmlc/section/phases/index.html).

Where Phase Gate Reviews are required, the following senior management members will be asked to participate:

* *List team here*

### Project Escalation Procedure

The project team will work diligently to resolve all issues at the project team level. However, there may be a point at which an issue must be escalated in order to be resolved. This project will escalate all issues transparently and through the following process:

1. When an issue cannot be resolved by the project team, the issue shall be raised by the Project Manager to the Project Champion and Key Stakeholders.

2. If resolved, the Project Manager will document the resolution as minutes and store these in the department’s intranet (or equivalent repository).

3. If the issue is unable to be resolved by this group, the issue will be raised by the Project Manager to the project Executive Sponsors.

## Required Project Resources *(\*If a Roles & Responsibilities document exists, this section should simply reference the existing document)*

*<Include a table of roles and responsibilities. Do not provide actual names, simply the department committing the resource (i.e. Role = Project Manager, Department = IT PMO, Responsibility = Overall manager of the project including accountability for timelines, deliverables & resource management). Attach additional organizational chart, if necessary.>*

| **Role** | **Department** | **Responsibility** |
| --- | --- | --- |
| Executive Sponsor  |  | * The executive leader who has sanctioned the project
* Monitors the overall progress of the project at a very high level
* Assists the Project Champion in escalations when necessary
 |
| Project Champion |  | * Is accountable to the executive sponsor for delivery of the solution
* Provides regular decision making and direction for the project
* Manages the overall timeline at a milestone level
* Ensures that the necessary resources are included in the project team, including the Project Manager
 |
| Project Manager |  | * Manages the overall project team, the PMLC documentation from Planning through Closing phases, and the detailed schedule and timeline for the entire project
* Is accountable for project execution from planning through closing
* Directs appropriate Gate Review Board reviews
* Regularly reports status and escalates issues as appropriate to the Project Champion.
 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Proposed Major Milestones

*<List the major milestones and best guess Level Of Effort (LOE) if known of each activity.>*

| **Major Activities** | **Expected LOE (if known)** |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
| Estimated Total Length of Project (in hours, days, weeks or months) |  |

Please note that the major activities above are designed to show best guess levels of effort and dependencies. Additional timeline constraints such as significant dates that would impact the project’s success are documented in the Constraints section of this Proposal where necessary. Actual deliverable dates will be provided as part of the Project Design Document (PDD).

# Funding

## Estimated Costs / Budget Required

*<Include costs for hardware, software, personnel and other resources required. Also detail how much will need to be budgeted, if it is different from costs (i.e. GW personnel excluded).>*

## Source of Funding & Timing

*<List the proposed source to provide the funding for this project, including the anticipated fiscal year budget.>*

# Business Case *(\*If a business proposal exists, this section should simply reference the existing document)*

## Cost Benefit Analysis

*<List the costs, savings and other benefits in such a way to allow the approver to determine the benefit of the proposed solution. Be sure to also include a description of any compliance, regulatory, mandate or other driver for this project.>*

### Qualitative

### Quantitative

### Comparative Analysis

*< Consider resource impact of this proposed initiative on other existing or proposed projects and how would this proposed project rank in comparison to existing initiatives.>*

# Proposal Approval

By signing, the individuals listed below have approved this proposal and have committed to the detailed solution and funding.

|  |  |  |
| --- | --- | --- |
| Name:  |  | Name:  |
| Title: Role: Project RequestorDate:  |  | Title: Role: Project Stakeholder (Optional) |
|  |  | Date:  |

|  |  |  |
| --- | --- | --- |
| Name:  |  | Name:  |
| Title: Role: Executive SponsorDate:  |  | Title: Role: Executive SponsorDate: |

*<For an approval received via electronic means, such as email, please indicate by placing “Electronic Approval” on the approval line. Please then place a copy of the electronic approval in the same project file folder where the approved version of this document is stored.>*

# Appendix A – Related Documents

*<Link or referenced location of the Project Request Form / Idea Summary and any other related documentation.>*

| **File Name** | **Document Owner** | **Document Location or Link** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Appendix B – Glossary

*<List any acronyms or terms which were used in the document and their meaning / definition.>*

| **Term / Acronym** | **Definition** |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |