Project Charter

**Project Name Goes Here**

*The cover page is optional. It is intended to provide a neat, uncluttered welcome to the document. It can serve as a separator page in a binder or folder of related documents and highlights any watermark that is present.*

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*The table of contents is optional. It is intended to highlight the structure and thoroughness of the document.*

*The intent of the Project Charter is to record the baseline understanding and management approval of a project. Generally speaking, the Project Charter expands on the information found in the Business Case and will feed into the Project Management plan.*

*The footer should include the file name and page numbers, for easy reference when reviewing and discussing the document. A version number or date can also be useful.*

#

# Project Summary

*Update to current from the Business Case; ensure it is understandable by all audiences and stakeholders.*

# Scope

*Specify what will and will not be included in the project, including end products, who they affect, and how they will be introduced.*

## Goals and Objectives

*Update as needed from the Business Case.*

## Deliverables

*Identify the tangible items delivered by this project (e.g., requirements, new software modules, business process changes, training), organized logically, such as in functional terms and/or by project phase/calendar.*

## Stakeholders

*Identify individuals and departments with a strategic or tactical interest in the project.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **MAU** | **Name and title** | **Interest/Impact** |
| Stakeholder |  |  |  |
| Customer |  |  |  |

## Out-of-Scope

*Outline explicitly those items not included in the project (e.g., features of a tool not being implemented, or departments/user groups removed from a process as part of a change).*

# Schedule

*Provide a high-level project schedule, preferably including a graphic (e.g., Gantt chart). Highlight major milestones (typically based on deliverables) and project phases.*



# Cost

## Resources

### Project Leadership

|  |  |  |
| --- | --- | --- |
| **Role** *(See Appx. A for role definitions.)* | **Name and title** | **Interest** |
| Project Sponsor(s) |  |  |
| Project Champion(s) |  |  |
| Functional Project Owner(s) |  |  |
| Project Manager |  |  |

### Project Team

|  |  |  |
| --- | --- | --- |
| **Role** *(See Appx. A for role definitions.)* | **Name and title** | **Purpose** |
| Developer(s) |  |  |
| Subject Matter Expert(s) |  |  |
| Tester(s) |  |  |
| End Users |  |  |

### Ongoing Use and Maintenance Roles

|  |  |  |
| --- | --- | --- |
| **Role** *(See Appx. A for role definitions.)* | **Name and title** | **Purpose** |
| Contract Administration |  |  |
| OIT Support |  |  |
| Functional Roles |  |  |

## Budget

*Outline a high-level budget (+/- 10-25%), with current costs, projected future charges and any cost-sharing arrangements among MAUs or departments.*

# Quality

## Flexibility Matrix

*Enter only one check in each row and one in each column of the shaded area to reflect the project leadership’s agreement on the relative “give” of each point of the project management triangle. Document any limits agreed to on the project manager’s authority to independently adjust each area.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Least Adjustable** | **Moderately Adjustable** | **Most Adjustable** | **Discussion** |
| **Scope** |  |  | **√** |  |
| **Schedule** |  | **√** |  |  |
| **Budget** | **√** |  |  |  |

## Risks, Constraints, Assumptions

*Update as needed from the same section of the Business Case.*

|  |  |  |
| --- | --- | --- |
| **Risk/Contraint/Assumuption** | **Item** | **Discussion** |
|  |  |  |

#

# Appendix A – Glossary

*As necessary, a glossary of terms specific to the project and its deliverables may be included. Also append any relevant details and reference documents.*

*Below is a* ***guide to the roles*** *identified in the template. The quoted text is from the Project Management Body of Knowledge (PMBOK) Guide, adjusted to account for UA’s existing use.*

*Note: any one individual may hold multiple roles in the project; for example, the Project Champion and the Project Sponsor are often the same.*

*The* **Stakeholders** *generically are people or groups (departments, committees, etc.) that have a vested interest in the project. There is a distinction made between those who have a tactical interest in the product of the project (the “customers”) and those who have a more administrative or strategic interest (the “stakeholders”).*

*Stakeholder: “…may have a financial interest in the project, contribute inputs to the project, or have an interest in the outcome of the project.”*

*Customer: the end-users; those who will use the product of the project.*

*The* **Project Leadership** *comprises those who will guide and coordinate the execution of the project.*

*Project Champion: “…the person or group … serving as spokesperson to higher levels of management”; that is, someone who is representing the project to senior management and is the “public face” of the project.*

*Project Sponsor: “…the person or group who provides resources and support … and is accountable for enabling success … [and] serves as an escalation path”; that is, the person or group who helps clear any obstacles and holds the project manager accountable.*

*Functional Project Owner: “… are the persons or organizations who will approve and manage the project’s product, service, or result”; that is, the primary customer, the person or group that is responsible for the functionality of the end product.*

*Project Manager: “…assigned … to lead the team that is responsible for achieving the project objectives.”; that is, the person responsible for the execution of the project and delivery of the end product.*

*The* **Project Team** *comprises those who will do the work of the project, producing the end product(s). These roles are flexible, and generally include: Developers, who produce the product; Subject Matter Experts (SME), who provide the details of the necessary functionality; Testers, who verify the developer’s work; and the End Users, who validate the SMEs work.*

*The* **Ongoing Use and Maintenance Roles** *are flexible and generally include: Contract Administrators, who lead the relationship with the vendor(s) or other units; the specific group for OIT Support, to account for future technical needs; and the Functional Roles needed to properly use the project’s product.*