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Project Charter

Project Name

Department Name

PROJECT INFORMATION			
Sponsor Name & Title			
Sponsor Contact Information			
Project Manager Name			
Project Manager Contact Information			
Project Charter Version	**Version #**	**Date** (MM/DD/YYYY)	**Comments** (Draft, Signed, Revised etc.)

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UNIT LOGO

PROJECT CHARTER: Project Name

PROJECT NAME:	Project Name
DEPARTMENT/UNIT:	Department or Unit Sponsoring Project
PREPARED BY:	Typically the Project Manager

DOCUMENT PURPOSE

The Project Charter documents the formal conversation between the Project Sponsor and the Project Manager/Team, including identifying metrics of success for the project. Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project including the definition of project success, and project resources requirements (people and funds).

Requests and additions to the project scope are considered "out-of-scope" for the current project. When a scope change is required, document a change request that includes an impact analysis of project costs, resources, schedule, and risks. The Project Sponsor then determines whether to approve the scope change request.

The project manager will retain additional documents that provide details about the management of the project, including a communications plan, a risk register, a change management plan, a budget, and a schedule.

REVIEW & APPROVAL

(The Project Sponsor's signature indicates approval of the Project Charter and acceptance of the Sponsor's responsibilities identified in the Project Charter. The Project Sponsor's signature also authorizes the Project Manager and Team to use the identified resources to proceed with the detailed planning and execution of the project, using this charter as guide.)

Project Sponsor(s) Name	Signature	Date

PURPOSE & GOALS

(Describe the current challenges and opportunities that the project is addressing. In your response, please be sure to answer the following four questions:

- *What problems will be addressed by the project?*
- *What goals will be achieved by the project?*
- *What benefits will the project deliver and which constituencies will receive these benefits?*
- *How does the project align with the strategic priorities of the campus, college, school, or unit?)*

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SCOPE

(Describe the scope of the project. The scope defines the boundaries where the project begins and ends. The scope describes what will be delivered including where, when, and how. It describes the services, functions, systems, solutions, or tangible products that are approved by the Sponsor(s) to be created during the course of the project, as well as the business process impacts.

OUT OF SCOPE

(List any deliverables including services, functions, systems, solutions, or tangible products that the Sponsor(s) has determined to be outside of the project's scope. It may include specific deliverables to be created during a future project.)

MEASURES OF SUCCESS

(Describe what success looks like for the project. How will the Sponsor(s), Functional Owner and Technical Owner know that the products and services created by the project have addressed the problems, delivered the needed benefits to members of the community, and achieved the goals that are described in the Purpose section of this Charter?)

#	Description of the Measure of Success	How Measured	Deadline to Achieve the Measure of Success	Is this measurement designed to determine if specific project goals described in the Project's Purpose section have been achieved? If yes, which goals?
1				
2				
3				
4				

PROJECT CONSTRAINTS & ASSUMPTIONS

(List the known and anticipated constraints, and the initial assumptions for the project.)

#	Description
1	
2	
3	
4	

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FINANCE DESCRIPTION

(Provide a high-level overview of the financial resources required to complete the project and operate the products and services created by it. This includes the project expense, funding sources, estimated revenue and saving goals, and ongoing operational expenses.)

Project Expenses & Funding

(Describe the project expenses and funding sources needed to successfully complete the project.
Do not include the operational expenses which should be entered in the *Operating Expenses and Lifetime* section.)

Project Expenses Describe the expenses required to complete the project including all labor.	**Expense Description**	**Amount**	**Timing of Expense (e.g. FY2016)**
		$	
		$	
		$	
		$	
Total Project Cost (What is the total estimated cost to complete the project? The total cost should equal the sum of the project expenses.)		$	

Project Funding (What are the sources of funding to conduct the project? For each funding source, indicate the amount of funding that will be provided. If the funding source is a loan, indicate this in the *Notes* column.)	**Source of Funding**	**Amount of Funding**	**Notes**
		$	
		$	
		$	
		$	
Total Provided Project Funding. (Should equal the sum of the *Project Funding* amounts described above.)		**$**	

Project Loan (If the *Project Funding* section includes a loan as a funding source, please describe the terms of the loan.)	**Name of Loan Provider**	**Loan Amount**	**Duration to Pay Back the Loan**	**Other Loan Conditions**

Revenue and Saving Goals

(Describe all the revenue and savings that will be produced by the products and services created by the project.)

Revenue (What is the estimated annual new revenue produced by the products and services created by the project?)	**Year 1 FY20__**	**Year 2 FY20__**	**Year 3 FY20__**	**Year 4 FY20__**	**Year 5 FY20__**

Savings (Describe any savings that the project is designed to achieve. For each saving goal, note whether this is a hard or soft savings and whether this is a one-time or recurring savings.)	**Source of Savings**	**Amount of Savings**	**Hard or Soft Savings?**	**One-time or Recurring Savings?**
		$		
		$		
		$		

Annual Operating Expenses & Lifetime (Post Implementation)

Annual Operating Expenses (What are the annual expenses required to operate the products and services created by the project, and how will these expenses will be funded?)	**Expense Description**	**Amount**	**Funding Source**
		$	
		$	
		$	
		$	
Total Annual Operating Expenses (What is the total annual operating expense? Should equal the sum of the annual operating expenses described above.)		**$**	

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Estimated Operating Lifetime (What is the estimated lifetime in years that the products and services created by the project will be operated?)	

PROJECT MILESTONES & DELIVERABLES

(List the major project milestones. Describe what will be delivered for each milestone and when it will be delivered.)

Milestone	Deliverables	Date

VENDOR CONTRACTS & DELIVERABLES

(List any vendors that will be used. Describe what will be delivered and when it will be delivered.)

Vendor Name	Deliverable(s)	Date Due

HIGH-LEVEL RISKS

(Identify the high-level project risks and the strategies to prevent them from becoming issues.)

#	Risk Description	Risk Management Strategy
1		
2		
3		

PROJECT COMMUNICATION ACTIVITIES

(Describe the project's communication activities that will be conducted to ensure there is effective project communications among the Sponsor(s), the members of the project team including the project manager, and other key stakeholders. Note who will participate in the meetings and receive project documents.

Description of the Communication Activity	Meeting Participants & Document Recipients	Frequency of Communication Activity	Person Responsible for the Communication Activity	Distribution Method	Archive Location

CHANGE MANAGEMENT REQUIREMENTS AND ACTIVITIES *(Please answer the questions below to identify the change management requirements and activities to help members of the community transition successfully to using the new services and products created by the project so that the campus, school, college or unit will achieve lasting benefits from the investment of resources. Identify the training and communications needed for staff providing operational support for the services and products created by the project.)*	
Describe the groups that will be impacted by the services and products created by the project and how they will be impacted. If there are particular units or departments that will be impacted, please identify them.	
Briefly describe *the training that is needed to help the impacted members of the community transition to use the new services and products and to adopt new business processes. Describe both the training needed for the customers of the services and products and the staff that provide operational support.*	
Briefly describe *the kinds of communication and outreach activities that are needed to help the impacted members of the community prepare for the transition to use the new services and projects and to adopt new business processes. Such activities could include newsletters, project websites, town hall meetings, and presentations to specific departments or campus groups.*	
Are there any other change requirements or activities that need to be conducted to help the impacted members of the community transition smoothly and successfully to achieve the intended and lasting benefits from the project?	

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APPENDIX A - PROJECT ROLES & RESPONSIBILITIES

Name the members of the project team.

PROJECT SPONSOR(S): Provides overall direction, guidance, and funding for the project. **RESPONSIBILITIES** include setting the vision and strategic direction, approving the project charter and plan; securing resources for the project; confirming the project's goals and objectives; keeping abreast of major project activities; making decisions on escalated issues; and assisting in the resolution of roadblocks.	
NAME	
NAME	

FUNCTIONAL OWNER(S): Manages the impact of the project in their functional area. **RESPONSIBILITIES** include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met.	
NAME	
NAME	
NAME	

PROJECT MANAGER: Leads the team in planning and implementing the project from initiation to closure.

RESPONSIBILITIES include managing the:

- Project scope,
- Schedule,
- Budget,
- Issues and risks

Create and maintain project documents including plans and status reports. Lead internal project communications. Facilitate conflict resolutions among project participants including project team members and key stakeholders.

NAME	

SUBJECT MATTER EXPERTS (SME): Provides expertise on project elements including business processes, technical solutions, IT security, data privacy, and accessibility. Campus has resources to assist you in this work. **RESPONSIBILITIES** include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task.	
NAME	
NAME	
NAME	
NAME	
NAME	
NAME	

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Describe the roles and responsibilities of the project participants.

PROJECT TEAM MEMBERS **RESPONSIBILITIES** include • Understanding the work to be completed, completing the research, data gathering, analysis, and documentation. • Informing the project manager and team members of issues, scope changes, risks, and quality concerns. • Proactively communicate status and manage expectations.			
NAME		**ROLE**	
NAME		**ROLE**	
NAME		**ROLE**	
NAME		**ROLE**	
NAME		**ROLE**	
NAME		**ROLE**	
NAME		**ROLE**	

APPENDIX B - KEY TERMS & DEFINITIONS FOR THIS PROJECT CHARTER

Define key terms unique to this Project Charter.