**Project Charter Template**

**Document Guidelines**

The Project Charter is intended to explicitly document project definition and scope and is a key document in the CCS Project Management Methodology. This template outlines the content and format of project charters to be used for all information systems and technology projects. *The* [*Project Management Office*](http://www.carleton.ca/ccs/project-office) *is your resource for completing this document.*

Any project matching one or more of the following criteria requires a Project Charter:

* *Funding is needed for the project (fiscal or base)*
* *Project resources will require greater than 20 person days of effort*
* *Project has an impact on another department (either from the deliverables of the project or for project resourcing)*
* *Project sponsor determines that strategic visibility for the initiative is necessary*

Depending on the project scope, this document will be reviewed by either the CIO or the Information Systems Steering Committee for approval. As a result, the completion of all sections of this document with sufficient information is necessary to facilitate that decision.

The decision will be one of the following:

1. *Approval to Plan* – Approval to spend the resources necessary to develop a detailed project plan (for large, complex projects).
2. *Approval to Execute* – Approval to proceed with the execution of the project (for smaller, shorter, inexpensive projects).
3. *On Hold* – Approval in principle with the project concept but certain conditions must be met prior to proceeding with execution.
4. *Rejected* – Project is declined and is not approved to proceed.

**Text in gray is instructions for completing the template and should be removed from the final version. Sections in this document should not be removed or reordered.**

**Project Charter**

**Project #** [assigned by Project Management Office]

|  |  |  |
| --- | --- | --- |
| **Project Name** | [Enter name of project] | |
| **Project Sponsor** | [Name], [Position], [Department] | |
| **Author(s)** | [Name], [Position], [Department] | |
| **Date:** | [yyyy-mm-dd] | |
| **Presentation to Computing Committee**  *(minimum of one Committee)* | | |
| **Name of Committee** | | **Date of Presentation** |
| Administrative Computing Committee | | [yyyy-mm-dd] |
| Teaching and Learning Computing Committee | | [yyyy-mm-dd] |
| Research Computing Committee | | [yyyy-mm-dd] |

**Approval to Plan Approval to Execute**

Top of Form

Bottom of Form

Top of Form

Bottom of Form

**Project Description**

Provide a brief description of the outcome or deliverables of the project.

[The goal of this project is to…]

**Purpose**

Describe the opportunity or problem that this project will address. Identify the key needs that the project is designed to meet and include any background material on the reasons why the project needs have arisen.

[Enter Purpose here…]

**Strategic Alignment**

Describe how the outcomes of this project will support the university or departmental strategic plans, such as referencing Carleton University’s [Strategic Integrated Plan](http://www.carleton.ca/sip) and the [IT Strategic Plan](http://www.carleton.ca/itstrategy/wp-content/uploads/CU-IT-Strategy.pdf).

[Enter section here…]

**Customers**

Identify the primary end user(s) that benefit from the deliverables of this project and how they will be positively impacted. Customers may be internal (e.g. university department) or external (e.g. students, alumnus)

|  |  |  |
| --- | --- | --- |
| **Customer Group** | **Description** | **Impact** |
| [e.g. Prospective students] | [Undergraduate and graduate applicants to the university] | [Streamlined access to admissions decisions] |
|  |  |  |
|  |  |  |
|  |  |  |

**Stakeholders**

List the key departments who will be impacted by the outcomes of this project. Explain the possible impacts for each stakeholder group.

|  |  |
| --- | --- |
| **Stakeholder Group** | **Impact** |
| [e.g. Financial Services] | [New method to collect registration fees] |
|  |  |
|  |  |
|  |  |

**Project Budget**

Identify the costs that will be incurred as a result of this project and that you are requesting to be covered by the Information Systems Steering Committee/CIO (fiscal) and by the sponsoring department (base). *For ‘Approval to Plan’ projects, list only the costs associated with the planning phase of the project.*

*Examples include:*

People - temporary project staffing (backfilled positions only), overtime costs, external consultants or developers

System – hardware, software, software licenses, servers to be purchased

Miscellaneous – external training, printing costs

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Description** | **Fiscal Funding** (one-time) | **Annual Base Funding** (recurring) |
| [e.g. Vendor consultants] | [Two vendor consultants to advise on system configuration and oversee technical implementation. 15 person days] | [$ 26,875] | [N/A] |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| ***TOTAL BUDGET (CDN$, including taxes)*** | | ***[$ 0]*** | ***[$ 0]*** |

**Scope**

List the deliverables of the project and the subject areas that are to be included.

|  |
| --- |
| **In Scope (Project Deliverables)** |
| [e.g. Performance development management system for professional services staff] |
|  |
|  |
|  |

Identify the subject areas, deliverables or user groups that are deliberately not included as part of the scope of this project. Include any items that could be misunderstood as being in scope.

|  |
| --- |
| **Out of Scope** |
| [e.g. Functionality for faculty members and non-permanent staff] |
|  |
|  |

**Success Criteria**

List and describe the target(s) that will be used to measure the success of the project. Include the expected outcome that this project will have on that measure and provide a baseline measure to demonstrate achievement of that outcome.

High-level examples include achieving a mandated/legislative demand, decreased costs, improved efficiency or effectiveness, increased capacity, improved customer satisfaction, and decreased institutional risk.

|  |  |  |
| --- | --- | --- |
| **Metric or Value** | **Intended Outcome** | **Baseline Measure** |
| [e.g. Residence check-out times] | [Decrease residence check-out times by 20%] | [92 minutes (avg)] |
|  |  |  |
|  |  |  |

**Alternatives**

Apart from the solutions proposed in this Project Charter, describe the other alternatives, including the status quo, that were evaluated to achieve the desired outcome. At least two alternative solutions should be described here for non-mandated projects.

[Enter Alternative 1 here…]

[Enter Alternative 2 here…]

**Assumptions**

List the key assumptions that the project depends on (e.g. resources, policies, scheduling, technology).

* [e.g. Existing policies will not be altered during the duration of the project]
* [Assumption #2...]
* [Assumption #3...]

**Constraints**

List the key constraints, restrictions or limitations that the project must adhere to.

* [e.g. No new/additional resources will be available for system support]
* [Constraint #2...]
* [Constraint #3...]

**Dependencies**

List any existing projects (planned or active) or operational changes that must be completed, in whole or in part, before this project can start. List any existing projects or operational changes that may be impacted by this project. Where applicable, provide a Project Number.

|  |  |
| --- | --- |
| **Project Name or Change** | **Impact** |
| [e.g. Conference Services Benchmarking project] | [Outcomes of that project may affect roles, responsibilities and affect system configuration] |
|  |  |
|  |  |

**Operational Support**

Once this project is complete, describe the anticipated support model/approach that will be used to ensure users are successfully transitioned to a new way(s) of operating and how support requests will be addressed on an ongoing basis. Describe how this support model will be funded.

[Enter section here…]

**Project Milestones**

List the major events in the life of the project, as specified in the Project Schedule. Milestones are significant events within the project that signal progress and achievement, and that the project is proceeding as planned. Milestones are a culmination of a number of tasks. Example milestones are included in the table below.

*For ‘Approval to Plan’ projects, list only the major events associated with the planning phase of the project.*

|  |  |
| --- | --- |
| **Milestone** | **Estimated Completion Date** |
| Project Charter approved | [Month] [Year] |
| Installation completed |  |
| Testing and Sign-off completed |  |
| Document and Training completed |  |
| Service go-live |  |
| Measurements completed |  |
| Project closed |  |

**Resourcing**

List the human resources to be allocated to the project and outline the project responsibilities for each role. Specify the time each role will be allocated to the project in terms of the estimated work days (cumulative) on the project. Based on the project Milestones, estimate the amount of work, in person days, which will be required of that role or position.

*For planning projects, list only the resourcing necessary to complete the planning phase of the project.*

|  |  |  |
| --- | --- | --- |
| **Role or Position** | **Responsibilities** | **Estimated Work [days]** |
| [e.g. Business analyst] | [Review existing process, develop system requirements, map new process] | [48 days] |
|  |  |  |
|  |  |  |
|  |  |  |
| **TOTAL RESOURCES** | | **[\_\_ days]** |

**Risks**

List and describe the risks that may jeopardize the success and/or completion of the project, specifically risks as they relate to project costs, deliverables, project schedule and end user value. Risk prevention or mitigation steps for these risks may have to be taken during the project and should be outlined in the Risk Management section of the **Project Plan**.

*Note: Do not include the risks associated with not proceeding with this project. Those risks should be described in the Purpose section.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk Name** | **Description** | **Impact** | **Severity (H, M, L)** | **Probability**  **(H, M, L)** |
| [e.g. MTCU Guidelines] | [Mid-project change in MTCU guidelines or rules] | [Schedule, Scope] | [H] | [M] |
|  |  |  |  |  |
|  |  |  |  |  |

**For Project Management Office Use Only**

|  |  |
| --- | --- |
| **Decision** | [Approval to Plan, Approval to Execute, On Hold, Rejected] |
| **Decision Body** | [ISSC or CIO] |
| **Decision Date** | [Date] |
| **Budget Approved** | [$ 0.00] |
| **Budget FOAPAL** | [FOAPAL] |
| **Computing Cmtee Review** | [Committee Name],[Date] |
| **CCS Managers Review** | [Date] |
| **Project Manager** | [Name], Computing & Communication Services |