Project Charter guidelines/instructions can be found in hidden text.

*The Project Charter is created for IT Projects which have had a Project Proposal approved by the Information Systems Steering Committee (ISSC).*

*The Project Charter is a key document in the ITS Project Management Methodology and is intended to explicitly document project scope, schedule and cost including implementation and ongoing maintenance.*

*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 assistance in 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 30 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 Execute – Approval to proceed with the execution of the project.*
2. *On Hold – Approval in principle with the project concept but certain conditions must be met prior to proceeding with execution.*
3. *Rejected – Project is declined and is not approved to proceed.*

*It provides important information regarding the value of the solution, its impact to the Carleton community, the overall cost of implementation, ongoing maintenance, and identifying the budget owners.*

*ISSC reviews and as appropriate, approves or denies all IT projects related to strategic enterprise level initiatives. Prior to presentation to ISSC, the Charter must be submitted to the appropriate subcommittee (Administrative Computing Committee, Teaching & Learning Computing Committee or Research Computing Committee) for review. After receiving the support of the subcommittee, the Project Charter must be submitted to the Manager, Project Management Office for inclusion at the next ISSC meeting.*

*For more information on IT governance, please refer to http://carleton.ca/itstrategy/governance/*

|  |  |
| --- | --- |
| **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] |

**Summary**

*Provide a brief description (2-3 sentences) of the outcome or deliverables of the project*.

[Enter here…]

**Description**

*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 here…]

**Scope**

*Scope describes project boundaries by defining what the project will and will not deliver. Deliverables are tangible, verifiable outcomes that signify completion of objectives. Indicate specific features, functions, timelines, costs, quality needs, or other “must have” requirements that restrict the project.*

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| **In Scope** |
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*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*.

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| **Specific Exclusions from Scope** |
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**Goals, Objectives and Success Criteria**

*Objectives are clear statements of specific activities/tasks that must be performed to achieve the goals. Performance measures are used to determine if objectives have been completed.*

*Ensure goals and objectives are Specific Measurable Achievable Realistic and Time-bound (****SMART****). At least one (1) Objective/Deliverable and one (1) Performance Measure must be identified.*

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

*Consider using the statement “We believe that <output> will result in <impact>. We will know we have succeeded when <measure>” as a starting point.*

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| **Objectives/Deliverables** | **Performance Measures** |
| List objectives and/or deliverables that will signify achievement of goal when project completed. | For each objective/deliverable, list measures that will be used to evaluate success of results achieved. |
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**Budget**

*Identify the costs that are to be incurred during, and potentially after, the project.*

*ISSC provides fiscal funding only.*

*Base funds are ongoing costs that will need to be covered even after the project is complete (for example, software yearly support fees).*

*Examples include:*

* People - overtime costs, external consultants or developers, training
* System – hardware, software, software licenses, servers to be purchased
* On-going support – additional resources required to support the system after go-live

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| --- | --- | --- | --- | --- |
| **Item** | **Description** | **Fiscal Funding** (one-time) | **Annual Base Funding \***(recurring) | **Annual Base Funding Owner**  |
| People |  |
|  |  |  |  |  |
|  |  |  |  |  |
| System |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Operational (post Go Live) |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total (CDN$, including taxes)** | **[$ 0]** | **[$ 0]** |  |

\* ISSC provides fiscal funding only.

*Assumptions are external factors that, at the time of writing the charter, are considered true, real or certain for purposes of planning. Certain unverified or unknown aspects that are likely to happen must be assumed as facts to proceed.*

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

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| **Assumptions** |
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*List the key constraints, restrictions or limitations that the project must adhere to. Constraints and boundaries are factors that are outside the control of the project team, that restrict or regulate the project. They may limit available options and affect performance of the project.*

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| **Constraints** |
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*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.*

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| **Dependencies:** |
| **Project Name or Change** | **Impact** |
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**Impact and Value**

*Identify all frequent and infrequent users that will be impacted from the deliverables of this project and how they will be impacted. Users may be internal to the University (i.e. Staff, Faculty, Students) or external (i.e. Applicants, Donors, Alumni)*

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| --- | --- | --- |
| **User Group** | **Impact** | **Value** |
| [e.g. Prospective students] | [Online access to admissions decisions] | [Improved user experience with a faster decision on application]  |
| [e.g. Financial Services] | [New method to collect registration fees] | [Online system allows notifications to be sent out for late fees][Online system enables all members of team to view status][Fees can be electronically deposited rather than requiring manual intervention to enter data] |

**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.*

*Note: Do not include the risks associated with not proceeding with this project. Those risks were already identified in the Project Proposal.*

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| --- | --- | --- | --- |
| **Risk Description** | **Probability (H/M/L)** | **Impact****(H/M/L)** | **Risk Response** |
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Risks will be managed according to the PMO Risk Management Plan located on the PMO website.

**Communication Plan**

*Taking the list of frequent and infrequent users from above, identify how each will be communicated with regarding this project – during the project (if applicable), at the roll-out of the solution and in future (i.e. for new people joining the group). Also consider any training materials that will need to be created, training sessions that will need to be held and ongoing materials that will need to exist after the project go-live for future users.*

|  |  |  |
| --- | --- | --- |
| **User Group** | **During the project** | **Post-project** |
| [e.g. Prospective students] | [not applicable] | [Incorporated into the package an Applicant or Prospect receives]. |
| [e.g. Departmental Administrators] | - Part of interviews during requirements gathering- Part of review team of prototype- Part of pilot group for testing | System will have online information incorporated into the solutionFinancial Services will create FAQs and solution information on their web site |
|  |  |  |
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**Major 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.*

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| --- | --- |
| **Milestone** | **Target Completion Date** |
| Project Charter approved | [Month] [Year] |
| Installation completed |  |
| Testing and Sign-off completed |  |
| Document and Training completed |  |
| Solution ready for go-live |  |
| Project close |  |
| Business Owner report to ISSC |  |

**Managing Change**

*Define the process to manage (review, approve, reject) requests to change scope, budget or schedule.*

Changes to scope, schedule or cost will be managed as per the PMO Change Control Plan located on the PMO website.

**Operational Support Model**

*Once this project is complete, describe the support model that will be put in place. In particular, how will the different users be supported if they have any questions or concerns regarding the system? How will ITS and / or the vendor be engaged if a solution issue is identified? Identify new positions or added effort in the Resourcing table.*

 [Enter section here…]

**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…]

**For Project Management Office Use Only**

|  |  |
| --- | --- |
| **Decision Date** | [Date] |
| **Budget Approved** | [$ 0.00] |
| **Budget FOAPAL** | [FOAPAL] |
| **ITS Managers Review** | [Date] |