PROJECT CHARTER

[<u>Note</u>: **All fields in blue text or marked by an asterisk (*) must be filled in**.]

1. 📖 = Online Help. *Mouse over the help symbols to see help text*. **Note: in this Sample File, help text is shown to the right.** 📖 📖   📖 📖   📖

2. Type an X in the appropriate checkboxes [   ]

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A portion of this template is available for your review

The complete template is available at www.cvr-it.com

Comment [1]: This template may be used for any project. It is optimized for use in a multi-department / agency setting in support of a formal project selection / prioritization process

Comment [2]: Save the Charter file using the filename format: *Charter_Lite_Project Name.doc*.

Comment [3]: Your project requires a Charter if it has a definite beginning and end date (i.e. ongoing maintenance does not require a Charter) and any of the following apply:
➔ List criteria here
IF YOU ARE UNCERTAIN, CONTACT <Name of contact>.

Comment [4]: You can download the latest version of this Project Charter template from <document source>: <PMO/COE should enter step by step instructions on how to obtain project templates here>

Comment [5]: This template may be used for any project. It is optimized for use in a multi-department / agency setting in support of a formal project selection / prioritization process

Comment [6]: Enter all dates in 8-digit MM/DD/YYYY format (e.g., *02/15/2012*)

1. General Project Information

* **Project Name**:	
* **Sponsoring Group / Department**: 📖	
* **Name of Project Sponsor**: 📖	
* **This project will have impact at the level of:**	[ ] Department [ ] Business Unit [ ] Enterprise [ ] Other
* **If Other, explain:**	
* **Project Co-Sponsor(s)**: 📖	
* **Project Rank:** 📖	

Comment [7]: Which group or department is the primary proponent of this project?

Comment [8]: This person must be a decision-maker with the authority to commit funding and resources. It is possible for an Executive Sponsor to assign a Project Sponsor as their proxy, as long as the Project Sponsor has full authority to make project decisions. For a full description of the Sponsor role, see the Sponsor Brochure document.

Comment [9]: For example, if the project is sponsored by a consortium, list members of the consortium here. If the primary Project Sponsor has co-sponsors supporting the project, list them here.

Comment [10]: Each Project Charter that your organizational unit (e.g. department) submits must have a unique ranking number – beginning with *1 = highest rank*. Ranking number indicates level of importance to your group. This will help the <Charter Review group> establish project priority for the enterprise.

Document History

Version	Date	Author	Reason for Change
1.0			

4. Project Definition

Provide sufficient information to fully describe the purpose and goals of this project.

* Project Purpose / Business Justification: *Describe the product or service that this project will produce. Describe the business problem, need or opportunity being addressed.* 📖

* Business Objectives (a.k.a. Business Value): *Business Objectives are the intended business outcomes of the project, i.e. the reason for doing the project. Business Value is realized as project deliverables are used by their intended audience. Therefore, Business Value is measured **after** project completion (i.e. after rollout of deliverables).* 📖

* Project Delivery Success Criteria: *Define what must be done in order for this project to be considered a success by its stakeholders. Project Delivery Success is measured upon completion of the project.* 📖

* Flexibility Analysis: *State the order of importance:* ***Cost – Time – Scope***: 📖

Most important:	
Second:	
Third:	

Who will use the deliverables from this project? 📖

Who benefits? How? Does anyone lose? How? 📖

Comment [12]: Describe the purpose of this project in a way that will grab the attention of the Project Selection Team or the Executive Committee. The Charter should make them aware of the true impact that this project can have on the organization (e.g., "To produce a Disaster Recovery Plan that protects and maintains the technical infrastructure that supports Organization functions in the event of a disaster."). Example Business Justification: "Organization would suffer irreparable harm if its technical infrastructure become unavailable for more than a short period."

Comment [13]: Business Value is generally obtained **after** the project has been completed. Business Objectives typically deal with cost, time, and quality (e.g., reduce the cost of delivery of this service by 30% within 6 months). The Business Value of your project will be judged based on how well it met these objectives. When a project meets its Business Objectives it may be considered an investment success.

Comment [14]: Project Delivery Success criteria might include, for example, completion by a certain date, cost within a certain amount, delivery of a specified scope, etc. It is best if project delivery success criteria are SMART: Specific, Measurable, Attainable, Results oriented, and Time delimited. Project Delivery Success does not depend on realization of Business Value.

Comment [15]: The Sponsor should decide on the order of priority. Consider the Triple Constraint, e.g. if the you are running out of time and the project clearly will not deliver on time, what is the Sponsor's preference? 1) Extend the deadline so the work can be done (Scope takes precedence); 2) delilver without all features completed in order to meet schedule (Time takes precedence); or 3) use additional resources to complete all scope on time (Scope and Time take precedence over Cost). It is assumed that compromise of quality is not acceptable as that likely would diminish or delay Business Value.

Comment [16]: Which individuals and/or groups will use the deliverables from this project?.

Comment [17]: Who will gain something from this project? Describe what that is. If anyone loses anything or is put at a disadvantage as a result of this project, list that here as well.

9. Financial / Resources Information

Provide a complete description of the cost and Return on Investment (ROI) of this project.

* Estimate of Implementation Cost *Use the* **Preliminary Project Cost Estimate template** *to calculate a preliminary cost estimate for this project. Include this template in the List of Addenda and attach it to this charter. Provide a link to the worksheet in the space below.* 📖

Link to Cost Estimate Worksheet:	
* Total Estimated Project Cost: 📖	$

Funding Source: *Indicate source of funds to be used for project implementation. Add rows as needed.*

Name of Organizational Unit 📖	**Fund Center** 📖	**Estimated Amount**
		$
		$

Special Resource Requirements (*Add rows as needed***)** 📖

Project Role (*e.g. Consultant; subject matter experts*)	**Hours needed** (*e.g. x hrs/mon for x months; x hours total*) *Include confidence limits, e.g. 100 hrs +/- 20 hrs*

Comment [33]: If relevant, Include both the cost of completing the project and the cost of not doing the project at all. If the project includes significant scope options that will impact cost, include this information. For example, the cost of project with Option 1 only = $400,000 (range $330,000 to $525,000). Cost of project with both Options 1 and 2 = $525,000 (range $430,000 to $650,000). Cost of not doing the project = $120,000 per year in fines starting 2012 as a result of not meeting Federal Requirements X, Y, and Z.).

Comment [34]: Unless your project has a fixed budget (e.g. from a grant), do not provide estimated cost as a single figure. Instead, either provide a range of costs (e.g. $150k - $180k) or a cost with confidence limits (e.g. $220k +/- 40%).

Comment [35]: Name of the group that is paying.

Comment [36]: The account from which money will be drawn.

Comment [37]: If there is need for any special or hard to find skills, or if there is a specific requirement for participation by stakeholders, list them here.