

Overview

Project Charter

Supporting Documents



CVR/IT Consulting LLC

Introduction

The Template Library includes several documents that can serve as addenda to a Project Charter. These include:

- **Business Requirements** - may be used to record the high level Business Requirements for the proposed project
- **Deliverables** – used when there is extensive deliverables information
- **Milestones** – used when there is extensive schedule information
- **Project Selection Criteria** – prompts for information that will be used to compare projects during the project selection process.
- **Quick IT Project Risk Evaluator** - provide a surprisingly effective risk evaluation for any Information Technology project.



Business Requirements

The **Business Requirements Addendum** to the Project Charter may be used to record the high level Business Requirements for the proposed project.

- Business Requirements are the high level features, functions, conditions and capabilities that must be included in project deliverables in order for the organization to realize the intended long term Business Value
- Business Requirements drive the definition of all other requirements (e.g. detailed functional and technical requirements) later in the project
- They are part of the preliminary Project Scope as defined in the charter
 - See the BABOK® for more details



Put your
logo here

Put your
organization
name here

PROJECT CHARTER – Business Requirements

<This document is an addendum to the Project Charter. Use it to record the Business Requirements of the proposed project. This document supports the preliminary Scope Definition in the charter.>


1. Save the file using the filename format: *ProjectCharter_BusinessRequirements_Project Name.doc*.
2. Enter other pertinent information in the **Notes** section at the end of this form.

1. General Project Information


Project Name:

Prepared By:

2. Project Business Requirements

Business Requirements are the high level features, functions, conditions and order for the organization to realize the intended Business Value from the project. Define and record Business Requirements here. This form assumes that the Requirements comprised of multiple groups. Provide a unique ID (e.g. A.1, A.2). Add rows as needed. 

Example: A Business requirement could be A. The system must support multiple forms of reporting, including: A.1 Allow ad hoc reporting on all available data A.2 Allow creation of canned reports (i.e. with built in selection criteria) A.3 Allow pre-defined report with user selectable selection criteria

A. <Replace this text: Enter the name of the first Business Requirements Group here> 

| Unique ID | Business Requirement |
|-----------|----------------------|
| A.1 | |
| A.2 | |

A view of the template is shown here, Mouse over a book symbol to trigger pop up help . Example shown is immediately above the related symbol.

Deliverables Addendum (1)

The **Deliverables Addendum** to the Project Charter may be used when there is more than one page of deliverables information

- Two options are provided: Deliverables List or Work Breakdown Structure in outline form
- Out of Scope items can be listed to provide clarity about what is and is not included in the project



Deliverables Addendum (2)

| 2. * Project Deliverables | |
|--|-------------|
| <p>List those high level deliverables that will be delivered as part of this project <u>and</u> those that will not. Deliverables are those project sub-products whose satisfactory delivery mark completion of the project (e.g., updated business process; working computer code; software manual; user training). For phased projects, please delineate the phases here. (e.g., Phase 1 of the Disaster Recovery Plan project will include an analysis of how best to backup and secure all data held on servers, but will not include consideration of data held on user systems such as laptops.) Add rows as needed.</p> | |
| <p>Option 1: Deliverables list – list all high level deliverables for this project</p> | |
| Deliverable | Description |
| 1. | |
| 2. | |
| <p>Excluded from the project – list anything that is not included in the project but that one or more stakeholders could think is included</p> | |
| 1. | |
| 2. | |
| <p>Option 2: WBS Outline – If you have developed a high level Work Breakdown Structure and have it available in outline form, provide it here.</p> | |
| <p><Enter outline here></p> | |
| <p>Excluded from the project – list anything that is not included in the project but that one or more stakeholders could think is included</p> | |
| 1. | |
| 2. | |

A portion of the template is shown here, This template provides two options for documenting project deliverables. Out of Scope items can be listed as well.



Milestones Addendum (1)

The **Milestones Addendum** to the Project Charter may be used when there is extensive milestones information must be included in the charter. This template collects the following:

- Project phase names
- Milestones
- Phase reviews
- Project completion criteria



Milestones Addendum (2)

| 2. Project Milestones | | |
|--|--------------------|------------------------|
| <p><i>Enter proposed Project Phases (e.g. Analysis, Design, Build & Test, Deployment) in the spaces provided. List major milestones within each phase. Option: if there is enough confidence in the dates, include completion date or date range for each phase. Option: include phase reviews if you use them (e.g. shown in italics as Execute Commit, etc.)</i></p> | | |
| Analysis Phase | | Completion Date |
| Milestone | Description | |
| 1. | | |
| 2. | | |
| <i>Execute Commit</i> | | |
| Design Phase | | Completion Date |
| Milestone | Description | |
| 1. | | |
| 2. | | |
| <i>Design Review</i> | | |
| Build & Test Phase | | Completion Date |
| Milestone | Description | |
| 1. | | |
| 2. | | |
| <i>Readiness Review</i> | | |

A portion of the template is shown here. This template collects information on project phase names, milestones, phase reviews and project completion criteria.










Project Selection Criteria (1)

The **Project Selection Criteria Addendum** to the Project Charter prompts for that information which will be used to compare projects during the project selection process..

- Customizable to fit your project selection process.
- Can serve as a companion document to the Project Evaluation Tool
- When used, the additional information can help management make an informed decision about which projects will make the best investments



Project Selection Criteria (2)

| 2. Project Selection Criteria | |
|--|--|
| <p><i>The following information can be used by a Project Selection Committee. The data obtained here supports use of the Project Evaluation Tool. [Add, change or delete these items as appropriate for your organization. This information may not be needed at all for very small projects.]</i></p> | |
| <p>Is there a mandate for this project? [.5]</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, describe:</p> |
| <p>Describe how does this project aligns with current Business Strategies. [.6]</p> | |
| <p>What is the level of risk to meeting the project budget? [.7]</p> | <p><input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low If High, explain:</p> |
| <p>What is the level of risk to meeting the project schedule? [.8]</p> | <p><input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low If High, explain:</p> |
| <p>What is the level of risk to implementation of all deliverables? [.9]</p> | <p><input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low If High, explain:</p> |
| <p>What is the level of risk to satisfying key stakeholders? [.10]</p> | <p><input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low If High, explain:</p> |
| <p>Does this project fit within the current Technical Architecture? [.11]</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown or Not Applicable Explain:</p> |
| <p>Does this project fit within the current Security Model? [.12]</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown or Not Applicable Explain:</p> |
| <p>Resouce Availability [.13]</p> | <p><input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/> Unknown Explain:</p> |

A portion of the template is shown here, Mouse over a book symbol to trigger pop up help . Customize the questions to reflect your selection criteria.

Quick IT Project Risk Evaluator

Project risk assessment is a proactive process that can help you identify and manage potential threats to your projects. Risk management begins early in the project, and continues until the project is completed.

Quick IT Project Risk Evaluator gives you a quick look at the level of risk in any IT project. It is primarily used during the Initiation stage, when the goal is to get insight into risks that might make a proposed project less desirable.

This template is described separately. See the “*View demo here*” link in the Initiation template set..



Summary

Project Charter Addenda can be used to enhance the value of your Project Charter by providing needed supporting information without making the charter document itself too complex.

These templates are part of a powerful Project Initiation template set available at very low cost from this source:

http://www.cvr-it.com/PM_Templates/

Other templates in this set include:

- **Business and IT Project Charters**
- **Project Charter Lite**
- **Cost/Benefit Analysis**
- **Flexibility Matrix Analysis**
- **Much more...**



About CVR/IT Consulting LLC

CVR/IT Consulting, established in 2002, provides guidance and support in the effective use of Project, Program, Portfolio Management and Business Analysis Technologies. The company provides professional consultation, training and tools in all matters related to Project Management and Business Analysis, such as:

- Implementation of governance structures and processes essential to effective Portfolio Management
- Establishment of a Project Management Office that finds its own success solely in the success of its customers
- Delivery of flexible, customized PM and BA Methodologies and tools
- Assessment of organizational project, program, portfolio management and business analysis practice
- Training (or re-training) of the project workforce
- Implementation of Organizational Change to make it all work



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