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IT PROJECT CHARTER

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

[To see **Online Help**  make certain that Tools/Options/View/ScreenTips is checked]

1. Does my project require a Charter? 
2. Obtain the **latest version**  of this Charter Template from the <document source>.
3. Save the Charter file using filename format: *Project Charter_***Project Name**.doc.
4. Enter all dates in 8-digit MM/DD/YYYY format (e.g., 02/15/2004).
5. Type an X in the appropriate checkboxes.
6. Keep a printed copy of your Risk Evaluation



1. General Project Information

| | | | |
|--|-------------|---------------|--------------------------|
| * Project Name: | | | |
| * Project Sponsor (answer all of the following): | | | |
| <ul style="list-style-type: none">• What department is the primary proponent of this project? (<i>Enter one.</i>) | | | |
| <ul style="list-style-type: none">• Who is the Project Sponsor? (<i>Note: This person must be a decision-maker with the authority to commit department resources.</i>) | | | |
| <ul style="list-style-type: none">• Is this an Enterprise Project, i.e. does it have significant impact on 3 or more departments (Y/N)? | | | |
| Project Co-Sponsor(s): | | | |
| * Department Project Rank  : | | | |
| Document History | | | |
| Version  | Date | Author | Reason for Change |
| * | * | * | * |
| | | | |
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2. Stakeholders

| | Name | Department | Telephone ¹ | E-mail |
|---|------|------------|------------------------|--------|
| * Project Manager: | | | | |
| * Tech Lead:  | | | | |
| * Business Lead  | | | | |
| Others: (e.g., those with a significant interest in this project) | | | | |
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3. Vendor Contacts

If a vendor is involved in development of this Charter, provide appropriate contact information

| Name | Company / Role | Telephone ² | E-mail |
|------|----------------|------------------------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

4. Project / Service Description

Type in a response to each item in the space immediately below it.

* **Project Purpose / Business Justification** Describe the product or service that this project will produce (e.g., "This project will produce a Business Continuation (BC) Plan for ABC Corporation.") Describe the business problem or need being addressed (e.g., "ABC Corporations is currently at risk for interruption of essential services during a crisis.")

* **Business Objectives (aka Business Value)** Measurable business outcomes of the project. Objectives have an attribute (e.g., cost), a yardstick (e.g., U.S. dollars) and an absolute or relative value (e.g., less than \$400,000). Business Objectives typically deal with cost, time, and quality (e.g., reduce the cost of delivery of this service by 30%). The Business Value of your project will be judged based on how well it met these objectives.

¹ Include area code first (e.g., 919-555-1212).

² Include area code first (e.g., 919-555-1212).

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4. Project / Service Description

Type in a response to each item in the space immediately below it.

* **Project Deliverables** List the high-level project sub-products whose satisfactory delivery mark completion of the project (e.g., working computer code, software manual, user training).

* **Clear Statement of What This Project Will Not Include** (Example: Phase 1 of the Business Continuation 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.)

* **Project Success** Define what must be done in order for this project to be considered a success by its stakeholders.

* **Project Milestones** Proposed start and end dates for Project Phases (e.g., Inception, Planning, Construction, Delivery) and other major milestones.

* **Major Known Risks (including significant Assumptions)** A Risk is anything that may cause the project to fail. Include both internal risks (things that the project team can control or influence) and external risks (things outside of the project team's control or influence). (e.g., Internal Risk – steep learning curve due to first use of this new technology. External Risk – pending Federal legislation may cause a change in requirements.)

Risk Rating from [On-Line Risk Evaluator](#) (Hi, Med, Lo):

List the most significant risks to the project (or attach a printout of your online risk assessment):

1.

* **Constraints** List any conditions that may limit the project team's options with respect to resources, personnel, or schedule (e.g., predetermined budget or project end date, limit on number of staff that may be assigned to the project).

External Dependencies Will project success depend on coordination of efforts between the project team and one or more other individuals or groups? Has everyone involved agreed to this interaction?

5. Project Selection Data

The following information will be used during the project Selection / Prioritization Process

* If this project is mandated or is required for continued business operation:

Mandated by whom?

Impact of not meeting mandate?

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5. Project Selection Data

The following information will be used during the project Selection / Prioritization Process

Strategic Alignment: Indicate which elements of the Balanced Score Card this project supports and how it does so. If your organization's strategic plan does not include a Balanced Score Card, use other measures of Strategic Alignment.

Financial ROI

Customer

Process (Internal)

Learning

* **Fit with IT Strategy** How does this project fit into the Organization's [Technology Program?](#)

Project Interaction: Are there other projects whose success depends upon the completion of this one? Does conduct of this project depend on the completion of another?

Project Category Run Grow Optimize Transform

This project is Urgent Yes No If Yes, explain:

6. Financial / Resources Information

Type in a response to each item in the space immediately below it.

Funding Source Select one of the following: (Example: **Operating Budget, Technology Fund, Grant, Other.** (If Other, please describe in the Notes section below.)

* **Estimate of Implementation Cost** Use [Project Charter Budget Worksheet](#) to calculate cost. 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 only Option 1 = \$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 2003 as a result of not meeting Federal Requirements X, Y, and Z.)

Create a [Link To Project Charter Budget Worksheet](#)

Implementation Cost in \$U.S. (estimate with range, low to high): \$

Return-on-Investment (ROI) Data (include both Financial and non-Financial ROI estimates)

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| Estimate time required of IT Department Staff (List each role and the number of hours required) | |
|--|---|
| Role (e.g. Developer, Analyst, Network Engineer) | Hours needed (e.g. x hrs/mon for x months; x hours total) Include confidence limits |
| | |
| Estimate time required of other Organization Staff (Add rows as needed) | |
| Role (e.g. Project Manager, Tester, Analyst) | Hours needed (e.g. x hrs/mon for x months; x hours total) Include confidence limits |
| | |
| | |

7. Estimated Total Cost of Ownership (TCO) 5-Year

In the **Calendar/Fiscal Year** column, change years as appropriate.

In the **Capital** and **Operational** columns, click on each entry once to select the full field (0.00) completely before entering the dollar figure. Gray box will disappear when number is typed in.

In the **Totals** row, total the dollar figure in each column by placing the cursor on dollar figure field, clicking once to select it, then clicking the right mouse button and selecting Update Field.

| Calendar Year (1, 2, 3) or Fiscal Year (2004-5, 2005-6) | Capital (\$U.S.) | Operational (\$U.S.) |
|--|-------------------------|-----------------------------|
| 2007-8 | 0.00 | 0.00 |
| 2008-9 | 0.00 | 0.00 |
| 2009-10 | 0.00 | 0.00 |
| 2010-11 | 0.00 | 0.00 |
| 2011-12 | 0.00 | 0.00 |
| Totals | 0.00 | 0.00 |

| 8a. Sourcing Strategy | | 8b. Acquisition Strategy | |
|---|--------------------------|---|--------------------------|
| Place an X in the appropriate adjacent box: | | Place an X in the appropriate adjacent box: | |
| Organization-Managed and Hosted | <input type="checkbox"/> | Sole-Source / Amend Contract | <input type="checkbox"/> |
| Vendor-Managed and Hosted | <input type="checkbox"/> | RFP / Competitive Bid | <input type="checkbox"/> |
| Organization-Managed, Vendor-Hosted | <input type="checkbox"/> | In-House / Custom-Develop | <input type="checkbox"/> |
| Vendor-Managed, Organization-Hosted | <input type="checkbox"/> | Other: | <input type="checkbox"/> |

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9. Types of Vendor Assistance

Place an X in the appropriate adjacent box.

| | | | | |
|-------------------------------|--------------------------|--|--|--------------------------|
| Turnkey Solution | <input type="checkbox"/> | | Supplemental Staffing (Time/Materials) | <input type="checkbox"/> |
| Vendor-Assisted (Fixed Price) | <input type="checkbox"/> | | COTS Hardware / Software | <input type="checkbox"/> |
| Other: | <input type="checkbox"/> | | None / Not Applicable | <input type="checkbox"/> |

10. Sign-off

| | Name | Signature | Date (MM/DD/YYYY) |
|---------------------------|------|-----------|----------------------|
| Business Sponsor | | | |
| IT Department Coordinator | | | |
| Project Manager | | | |

11. List of Addenda

List all files supplemental to this Charter here. Optional: Use filename to create hyperlink to document.

| Document Name | Filename |
|---------------|----------|
| | |
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12. Notes

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