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IT Project Charter Template
Rev. 2.6, August 2014

Sample: For Evaluation Only

IT PROJECT CHARTER

[**Note:** 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]: Save the Charter file using the filename format: *Charter_Lite_<Project Name>.doc.*






Comment [2]: 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 [3]: 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 [4]: 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 [5]: 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: 	
* Name of Charter Analyst: 	
* This project will have impact at the level of:	[] Department [] Business Unit [] Enterprise [] Other
* If Other, explain:	
* Project Co-Sponsor(s): 	
* Project Rank: 	

Comment [6]: Which group or department is the primary proponent of this project?

Comment [7]: 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 [8]: Name of the person who was primarily responsible for collecting, analyzing and documenting the information contained in this charter.

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.


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IT Project Charter <Name of Project>


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 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 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 success criteria are SMART: Specific, Measurable, Attainable, Results oriented, and Time delimited. Note: Project 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) deliver 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]: 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.

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IT Project Charter <Name of Project>

5. Project Scope

Provide sufficient information to fully define the scope of this project.

* Technology

Yes
No
??

This project includes the introduction of new or additional technology

Comment [.21]: Technology can include, for example, new software application, computers, manufacturing equipment, etc. If the impact on Technology is not known, check ??

If the answer to the above is Yes, then answer the following. If No, proceed to Business Process. If ??, explain in the space below, then proceed to Business Process.

Explain:

Yes
No

The new technology is consistent with the current Technical Architecture
If No, explain below

Yes
No

The new technology is consistent with the current Security Model
If No, explain below

Yes
No

There will be need for post-project maintenance and/or support
If Yes, explain below

Yes
No

There will be need for follow-on Disaster Recovery or Business Continuity planning
If Yes, explain what is needed and how it will be done. If No, explain why it is not needed.

Explain:

* Business Process

Yes
No
??

The project includes a change in Business Process

Comment [.22]: Check Yes if the project will change a Business Process. Any project that includes implementation of a Commercial Off the Shelf or Software as a Service product almost certainly includes a change in Business Process. If the impact on Business Process is not known, check ??

If the answer to the above is Yes, then answer the following. If No, proceed to Project Milestones. If ??, explain in the space below, then proceed to Milestones:

Explain:

Describe the type and amount of impact that the change could have on people, e.g. the workforce, middle management or others

Comment [.23]: Examples of this include adoption of new work practices, use of new equipment, changes in how decisions are made or in who makes them, and reorganization.

Yes
No

The project includes an Organizational Adoption component
If the answer is No, explain why it is not needed.

Comment [.24]: Organizational Adoption is the work that is done to ensure that change is accepted and project deliverables are used.

Explain:

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IT Project Charter <Name of Project>

12a. Sourcing Strategy		12b. Acquisition Strategy	
<i>Place an X in the appropriate adjacent box.</i>			
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"/>

13. Types of Vendor Assistance			
<i>Place an X in the appropriate adjacent box.</i>			
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"/>

14. Sign-off			
<i>Project Sponsor and any Co-Sponsors should sign the Project Charter. In addition, key stakeholders should sign as an indication that they agree with the scope, projected cost, etc. Finally, if the Project Manager has been assigned that person should also sign the charter.</i>			
	Name	Signature	Date (MM/DD/YYYY)
Business Sponsor:			
IT Project Coordinator:			
Project Manager:			

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