



UNIVERSITY OF
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INFORMATION
TECHNOLOGIES

Project Name

Project Charter

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The revision control log maintains a record of changes to this document, along with the associated revision number and date. The Communication of Change column is to document how the change was communicated to all stakeholders. Add/remove rows as required.

Revision Control

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1. Purpose of This Document

The purpose of this Project Charter is to provide key stakeholders and project team members with an understanding of the **xxx** Project. Specifically, the document is intended to:

- provide a single document summarizing the **xxx** project;
- provide an understanding of why the project is being conducted;
- identify what results the project will deliver; and
- how the project will deliver those results

Once approved, this document will define the contract between the project team and the **xxx** sponsor(s).

2. Project Overview

2.1. Background

Itemize the events that preceded project initiation and identify the business challenges that caused this project to be required. Describe why, from a business perspective, this project is important. This is OA-type information.

2.2. Business Objectives

Description of what this project will accomplish and deliver, what it is intended to achieve. Good objectives are SMART [Specific, Measurable, Attainable, Results-oriented and Time-bound]. Objectives should align with the business needs and benefits.

Objective	Measure of Success	Measured By
List each objective in a separate table row.	Indicate what will show if the objective is successful.	Indicate how the success of the objective will be measured.

2.3. Critical Success Factors

Describe what is critical for the project to make it successful. What factors are you dependent on to deliver the project?

Examples of critical success factors (CSFs) are

- understanding the business context and project objectives
- setting vision and goals
- recognizing and quantifying opportunities

3. Scope, Approach and Assumptions

3.1. Project Scope

3.1.1. *In Scope*

Describe the end product(s) focusing on **what** is being delivered to the client, **not how**.

3.1.2. *Out of Scope*

Describe what the project will **not** deliver. >

3.2. Approach

Describe the approach to be used in delivering the solution. This could include several dimensions from the examples listed below:

- The phases of the project that will be taken to get to the end of the project.
- Package installation, custom development, accelerated development, prototyping, Agile methodologies
- Testing Strategy, QA
- Proof of concept only; not intended for production use
- Big bang or incremental implementation
- Multiple releases
- Location-by-location roll-out or function-by-function roll-out

3.3. Assumptions

Describe the characteristics which you assume will happen during the execution of the project. Assumptions may need to be managed as risks to the project and included in the risk management plan.

4. Deliverables and Milestones

4.1. Deliverables

Describe the project deliverables expected to be produced by the project by each stage as outlined in the project approach. Project deliverables are typically those artifacts delivered during the project in order to deliver the end solution. They may or may not be permanent deliverables that can be used outside of the project. An example of a project-specific deliverable is a requirements document, while a final deliverable may be the user documentation. Be as specific as possible to strive for elimination of assumptions regarding what will and what will not be delivered by the project.

Text in the table below is sample text and should be replaced with what is pertinent to your document. Add/remove rows as required.

Stage	Deliverable Name	Target Date
Initiation	Project Charter	dd-mmm-yy
Design	Technical Requirements Document	dd-mmm-yy
Delivery	Test Plan	dd-mmm-yy

1.1. Milestones

Milestones are significant points or events in your project. They are used to determine whether or not the project will meet the anticipated schedule. Examples of milestones are training materials developed; software purchased. Technical milestones are those tasks for which a technical resource is accountable. An example is 'interfases developed and tested'.

Text below is sample text and should be replaced by what is pertinent to your project. Add/remove rows as required.

Milestone	Target Date
Project Initiated	dd-mmm-yy
Completion of Product Installation	dd-mmm-yy
Completion of Training	dd-mmm-yy
Go-live	dd-mmm-yy
Hand-off to Operations	dd-mmm-yy
Project Close Out	dd-mmm-yy

5. High Level Client Impact Summary

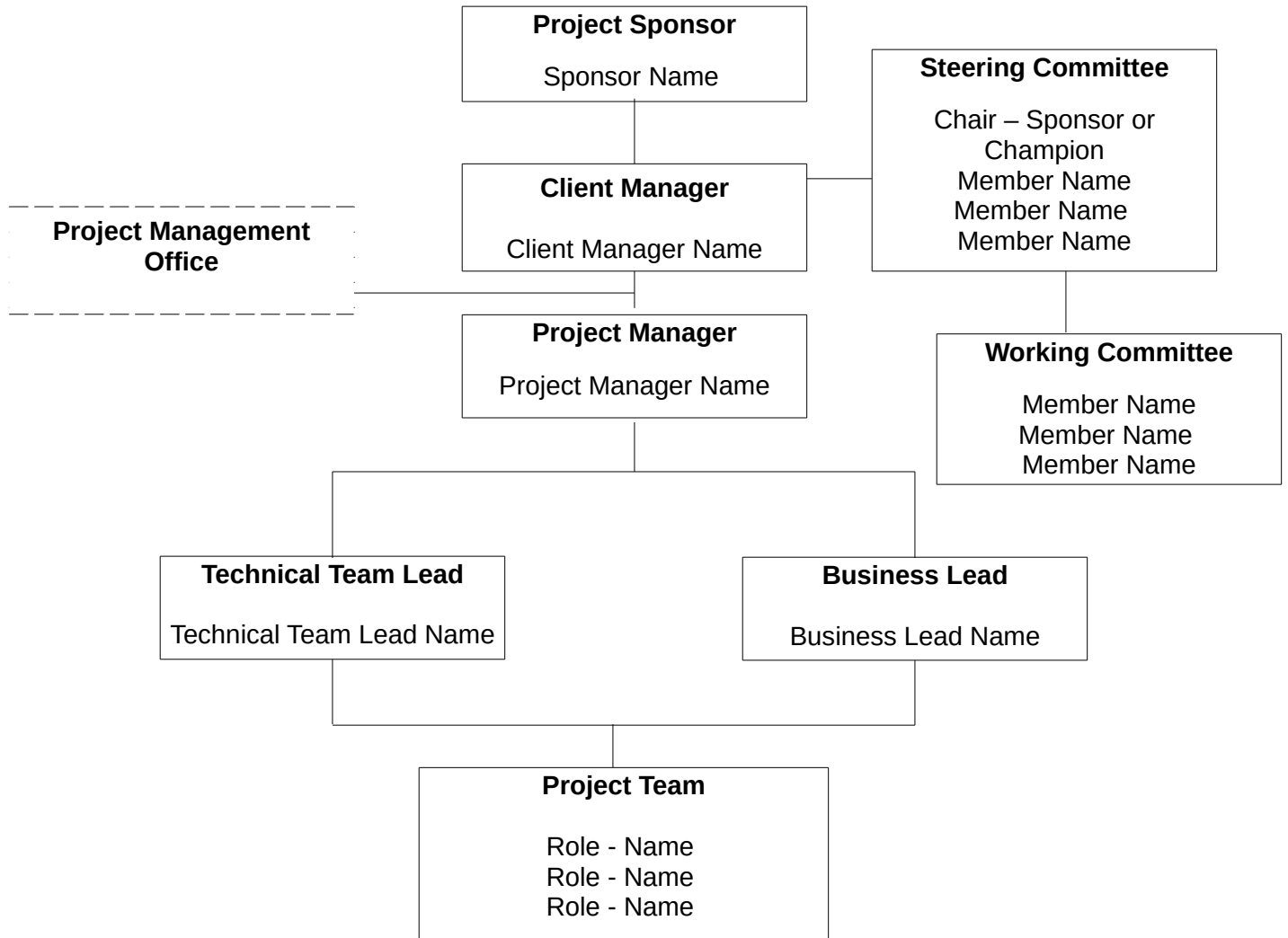
The impact on clients needs to be assessed. Using the table below to indicate how the project will impact the client. Replace sample text and add/remove rows as required.

Client Group	Client Impact	Degree of Impact	# of User Impacted	Nature of Impact
Name of client group	Describe what will impact this group. E.g.: new screen lay-outs, new business process. List the high-level areas.	Indicate to what degree they will be impacted using ratings of transparent/potential impact, low, medium or high	Show how many users out of the group will be impacted. E.g: 500/500; 435/500; 5/500.	Indicate the nature of the impact and time involved. E.g: Training, 1 hour;

6. Project Organization

6.1. Organizational Structure

Show the structure for the project team. The chart below is a sample and was created using text boxes. It can be modified for your project or replaced entirely with your own organization chart from Visio, etc.



6.2. Roles and Responsibilities

Describe the **key roles and responsibilities** on the project. The chart below is a RACI and is shown as a sample. It will need to be modified for your project or use a chart that is more suited to your project.

If you use a different chart (e.g.: xxxx) for indicating roles and responsibilities, be sure to include a legend.

Role & Responsibilities / Deliverable	ManagerProject	AnalystBusiness	LeadTechnical	DirectorBusiness	MembersBusiness	SponsorProject	Steering Committee
Create Project Charter	R,A	I	I	C	C	C	C
Fund Project	I			I		R,A	C
Document Requirements	C,A	R	C	C	C	C	C

R - Responsible (the doer)

A - Accountable (the buck stops here)

C - Consult (In the loop – two way communication)

I - Inform (Keep in the picture – one way communication)

6.3. Stakeholders

The stakeholders and associated key expectations are as shown in the table below.

A project stakeholder is anyone who can impact or be impacted by the project. Use the table below to indicate who they are and the associated expectations. Add/remove row as required.

Client Group	Key Contact	Stakeholder Expectations of the Project	Project Expectations of the Stakeholder
Indicate the client group.	Indicate who the key contact for the client group / department is.	List the expectations of the client group.	List the expectations the project has of the client group.

7. Resource Requirements and Budget

7.1. Resource Requirements

State the resource requirements or critical skill set as well as any major facility needs required to support the approach, schedule, and budget for the project. Use the table below for this information. Add/remove rows as required. Text shown is sample only and needs to be replaced with resource requirements specific to your project. You may indicate the name of any proposed human resources if desired.

Role	Proposed Person	Dates Required (From – To)	Anticipated Hours
Developer	First Name, Last Name	dd-mmm-yy to dd-mmm-yy	25
Business Analyst	First Name, Last Name	dd-mmm-yy to dd-mmm-yy	36
Trainer	First Name, Last Name	dd-mmm-yy to dd-mmm-yy	43
Technical Advisor	First Name, Last Name	dd-mmm-yy to dd-mmm-yy	18

7.2. Constraints and Dependencies

7.2.1. Constraints

Itemize all the known restrictions or limitations placed on the project.

Examples of constraints are

- Selected package must be windows-based.
- Solution must be in place and operational by year end.

7.2.2. Dependencies

Itemize all known dependencies for the project. Dependencies are those factors which the project depends on for successful delivery of the solution. If dependencies are noted they need to be managed as risks to the project and included in the risk management plan

Examples of dependencies are

- The project may have a dependency on another project's solution delivery.
- The solution may be dependent on a particular software.
- The project may be dependent on the availability of some specialized labor resources.

7.3. Cost to Complete the Project (One-time Cost)

The following table provides an estimate of the cost to complete the project.

Provide descriptive detail if appropriate. Use the table below to provide an estimate of the cost to complete the project. Text is sample only and needs to be replaced with costs specific to your project. Add/remove rows as required.

Resource Type Expenditure	Total Project Costs
Labour	Item Cost
Hardware	Item Cost
Software	Item Cost
Contracted Services	Item Cost

Travel, Training & Other Expenses	Item Cost
Contingency (usually 10% of above project costs)	Item Cost
Cost to Complete (includes project cost plus contingency)	\$Total Cost

7.4. Three Year General & Administrative Expense (G&A) Outlook

The three-year G&A outlook is the difference between current maintenance and support costs for an application and the future costs based on the changes made by the project. Text provided is sample only and needs to be modified specific to your project. Add/remove rows as required.

Include any descriptive text or notes that may be appropriate. For example, 'costs do not include licensing rate increases'.

Cost Category	Year 1	Year 2	Year 3
Labour	Item Cost	Item Cost	Item Cost
Hardware	Item Cost	Item Cost	Item Cost
Software	Item Cost	Item Cost	Item Cost
Data	Item Cost	Item Cost	Item Cost
Other	Item Cost	Item Cost	Item Cost
Total	\$Total Cost	\$Total Cost	\$Total Cost

8. Risk Management:

8.1. Initial Risk Assessment

At the project initiation phase complete a preliminary risk analysis to identify high priority risk events. Summarize your top three risks in this section of the Project Charter.

8.2. Ongoing Risk Management Process

Use this section to outline how risks will be managed as the project proceeds.

8.3. Disaster Recovery Plan (DRP)

This section is to identify any existing DRP which may have an impact on the scope of this project. >.

8.4. Business Continuity Plan

Include a business continuity plan if appropriate. An example would be how to handle an automated process if it becomes unavailable for a period of time.



9. Appendices

Appendices are used for information that is of use to the project signatories but does not need to be included in the main body of the document.

1.2. Appendix A – Project Control Procedures

Detail of project change control procedures should be included in all project charters. This could be a simple statement of how changes to the project will be handled and inclusion of any sample forms.