# Project Charter

## Project Name

## Department Name

| PROJECT INFORMATION | | | |
|---|---|---|---|
| **Sponsor Name & Title** | | | |
| **Sponsor Contact Information** | | | |
| **Project Manager Name** | | | |
| **Project Manager Contact Information** | | | |
| **Project Charter Version** | **Version #** | **Date** (MM/DD/YYYY) | **Comments** (Draft, Signed, Revised etc.) |
| | | | |
| | | | |

# PROJECT CHARTER: Project Name

[Instructions for the Project Charter Template](#)

| | |
|---|---|
| **PROJECT NAME:** | Project Name |
| **DEPARTMENT/UNIT:** | Department or Unit Sponsoring Project |
| **PREPARED BY:** | Typically the Project Manager |

## DOCUMENT PURPOSE

The Project Charter documents the formal conversation between the Project Sponsor and the Project Manager/Team, including identifying metrics of success for the project. Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project including the definition of project success, and project resource (people and funds) requirements.

Requests and additions to the project scope are considered "out-of-scope" for the current project. When a scope change is required, document a change request that includes an impact analysis of project cost, resources, schedule, and risk. The Project Sponsor then formally approves the scope change request.

The project manager will retain additional documents that provide detail on the management of the project, including a communications plan, an issues log, a risk log, a change management plan, a budget, and a work schedule.

## REVIEW & APPROVAL

*(The Project Sponsor's signature indicates approval of the Project Charter and acceptance of the Sponsor's responsibilities identified in the Project Charter. The Project Sponsor's signature also authorizes the Project Manager and Team to use the identified resources to proceed with the detailed planning and execution of the project, using this charter as guide.)*

| Project Sponsor(s) Name | Signature | Date |
|---|---|---|
| | | |
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## PURPOSE & GOALS

*(Describe the current challenges and opportunities that the project is addressing. In your response, please be sure to answer the following four questions:*
- *What problems will be addressed by the project?*
- *What goals will be achieved by the project?*
- *What benefits will the project deliver and which constituencies will receive these benefits?*
- *How does the project align with the strategic priorities of the campus, college, school, or unit?)*

## SCOPE

*(Describe the scope of the project. The scope defines the boundaries where the project begins and ends. The scope describes what will be delivered including where, when, and how. It describes the services, functions, systems, solutions, or tangible products that are approved by the Sponsor(s) to be created during the course of the project, as well as the business process impacts.*

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## OUT OF SCOPE
*(List any deliverables including services, functions, systems, solutions, or tangible products that the sponsor has determined to be outside of the project's scope. It may include specific deliverables to be created during a future project.)*

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| --- |
|  |

## MEASURES OF SUCCESS
*(Describe what success looks like for the project. How will the Sponsor(s), Functional Owner and Technical Owner know that the products and services created by the project have addressed the problems, delivered the needed benefits to members of the community, and achieved the goals that are described in the Purpose section of this Charter?)*

| # | Description of the Measure of Success | How Measured | Deadline to Achieve the Measure of Success | Is this measurement designed to determine if specific project goals described in the Project's Purpose section have been achieved? If yes, which goals? |
| --- | --- | --- | --- | --- |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |

## PROJECT CONSTRAINTS & ASSUMPTIONS
*(List the known and anticipated constraints, and the initial assumptions for the project.)*

| # | Description |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |

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## FINANCE DESCRIPTION

(Provide a high-level overview of the financial resources required to complete the project and operate the products and services created by it. This includes the project expense, funding sources, estimated revenue and saving goals, and ongoing operational expenses.)

### Project Expenses & Funding

(Describe the project expenses and funding sources needed to successfully complete the project.
Do not include the operational expenses, which should be entered in the *Operating Expenses and Lifetime* section.)

| Project Expenses<br>Describe the expenses required to complete the project including all labor. | Expense Description | Amount | Timing of Expense (e.g. FY2016) |
|---|---|---|---|
| | | $ | |
| | | $ | |
| | | $ | |
| | | $ | |
| **Total Project Cost**<br>(What is the total estimated cost to complete the project? The total cost should equal the sum of the project expenses.) | | $ | |

| Project Funding<br>(What are the sources of funding to conduct the project? For each funding source, indicate the amount of funding that will be provided. If the funding source is a loan, indicate this in the *Notes* column.) | Source of Funding | Amount of Funding | Notes | |
|---|---|---|---|---|
| | | $ | | |
| | | $ | | |
| | | $ | | |
| | | $ | | |
| **Total Provided Project Funding.**<br>(Should equal the sum of the *Project Funding* amounts described above.) | | $ | | |

| Project Loan<br>(If the *Project Funding* section includes a loan as a funding source, please describe the terms of the loan.) | Name of Loan Provider | Loan Amount | Duration to Pay Back the Loan | Other Loan Conditions |
|---|---|---|---|---|
| | | | | |

### Revenue and Saving Goals

(Describe all the revenue and savings that will be produced by the products and services created by the project.)

| Revenue<br>(What is the estimated annual new revenue produced by the products and services created by the project?) | Year 1<br>FY20__ | Year 2<br>FY20__ | Year 3<br>FY20__ | Year 4<br>FY20__ | Year 5<br>FY20__ |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |

| Savings<br>(Describe any savings that the project is designed to achieve. For each saving goal, note whether this is a hard or soft savings and whether this is a one-time or recurring savings. ) | Source of Savings | Amount of Savings | Hard or Soft Savings? | One-time or Recurring Savings? |
|---|---|---|---|---|
| | | $ | | |
| | | $ | | |
| | | $ | | |

### Annual Operating Expenses & Lifetime (Post Implementation)

| Annual Operating Expenses<br>(What are the annual expenses required to operate the products and services created by the project, and how will these expenses will be funded?) | Expense Description | Amount | Funding Source |
|---|---|---|---|
| | | $ | |
| | | $ | |
| | | $ | |
| | | $ | |
| **Total Annual Operating Expenses**<br>(What is the total annual operating expense? Should equal the sum of the annual operating expenses described above. ) | | $ | |
| **Estimated Operating Lifetime**<br>(What is the estimated lifetime in years that the products and services created by the project will be operated?) | | | |

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## PROJECT MILESTONES & DELIVERABLES
*(List the major project milestones. Describe what will be delivered for each milestone and when it will be delivered.)*

| Milestone | Deliverables | Date |
|---|---|---|
| | | |
| | | |
| | | |
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| | | |

## VENDOR CONTRACTS & DELIVERABLES
*(List any vendors that will be used. Describe what will be delivered and when it will be delivered.)*

| Vendor Name | Deliverable(s) | Date Due |
|---|---|---|
| | | |
| | | |
| | | |
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## HIGH-LEVEL RISKS
*(Identify the high-level project risks and the strategies to prevent them from becoming issues.)*

| # | Risk Description | Risk Management Strategy |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |

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## PROJECT COMMUNICATION ACTIVITIES

*(Describe the project's communication activities that will be conducted to ensure there is effective project communications among the Sponsor(s), the members of the project team including the project manager, and other key stakeholders. Note who will participate in the meetings and receive project documents.*

| Description of the Communication Activity | Meeting Participants & Document Recipients | Frequency of Communication Activity | Person Responsible for the Communication Activity | Distribution Method | Archive Location |
|---|---|---|---|---|---|
| Project Team Meetings | Project Team | Weekly | Project Manager | Meeting notes distributed via the team's email list. | Notes stored on the project's CalShare Site |
| Sponsor Meetings | Sponsor and Project Manager | Monthly | Project Manager | Meeting notes emailed to the Sponsor. | Notes stored on the project's CalShare Site |
| Project Status Report | Sponsor & Project Team | Monthly | Project Manager | Reports distributed via email using the project team's mailing list and the Sponsor's email address | Reports stored on the project's CalShare Site |
| Project Planning Document Including the Charter, Schedule, Budget, Risk Register, and Risk Plan | Sponsor & Project Team | As Needed | Project Manager | Notification of document creation and updates emailed to the project team | Reports stored on the project's CalShare Site |

## CHANGE MANAGEMENT REQUIREMENTS AND ACTIVITIES

*(Please answer the questions below to identify the change management requirements and activities to help members of the community transition successfully to using the new services and products created by the project so that the campus, school, college or unit will achieve lasting benefits from the investment of resources. Identify the training and communications needed for staff providing operational support for the services and products created by the project.)*

| | |
|---|---|
| *Describe the groups that will be impacted by the services and products created by the project and how they will be impacted. If there are particular units or departments that will be impacted, please identify them.* | |
| Briefly describe *the training that is needed to help the impacted members of the community transition to use the new services and products and to adopt new business processes. Describe both the training needed for the customers of the services and products and the staff that provide operational support.* | |
| Briefly describe *the kinds of communication and outreach activities that are needed to help the impacted members of the community prepare for* | |

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|---|---|
| *the transition to use the new services and projects and to adopt new business processes. Such activities could include newsletters, project web sites, town hall meetings, and presentations to specific departments or campus groups.* | |
| Are there any other change requirements or activities that need to be conducted *to help the impacted members of the community transition smoothly and successfully to achieve the intended and lasting benefits from the project?* | |

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## APPENDIX A - PROJECT ROLES & RESPONSIBILITIES
*Name the members of the project team.*

**PROJECT SPONSOR:** Provides overall direction, guidance, and funding for the project.

**RESPONSIBILITIES** include setting the vision and strategic direction, approving the project charter and plan; securing resources for the project; confirming the project's goals and objectives; keeping abreast of major project activities; making decisions on escalated issues; and assisting in the resolution of roadblocks.

| NAME | |
|------|--|
| NAME | |

**FUNCTIONAL OWNER:** Manages the impact of the project in their functional area.

**RESPONSIBILITIES** include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met.

| NAME | |
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| NAME | |

**PROJECT MANAGER:** Leads the team in planning and implementing the project from initiation to closure.

**RESPONSIBILITIES** include scope and change management, keeping the project plan current (deliverables, schedule, and resources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams...

| NAME | |
|------|--|
| NAME | |

A **SUBJECT MATTER EXPERT (SME)** provides expertise on project elements including business process and current or new technical solutions.

**RESPONSIBILITIES** include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task.

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*Describe the roles and responsibilities of the project participants.*

| PROJECT TEAM MEMBERS | | | |
|---|---|---|---|
| **RESPONSIBILITIES** include<br>• Understanding the work to be completed, completing the research, data gathering, analysis, and documentation,<br>• Informing the project manager and team members of issues, scope changes, risks, and quality concerns, and<br>• Proactively communicate status and manage expectations. | | | |
| **NAME** | | **ROLE** | |
| **NAME** | | **ROLE** | |
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## APPENDIX B - KEY TERMS & DEFINITIONS FOR THIS PROJECT CHARTER

*Define key terms unique to this Project Charter.*

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