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| --- |
| **<Program | Project name> charter****<Org Name>** |

[The purpose of this charter template is to provide detailed information about the project.>

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**DOCUMENT HISTORY**

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*Notes to the Author*

*[This document is a template of a Project Charter document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.*

*· Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

*· Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

*· Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

*When using this template for your project document, it is recommended that you follow these steps:*

1. *Replace all text enclosed in angle brackets (i.e., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers.*
2. *Modify boilerplate text as appropriate to the specific project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
4. *To update the Table of Contents, right-click and select “Update field” and choose the option- “Update entire table”*
5. *Before submission of the first draft of this document, delete this “Notes to the Author” page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*

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# Executive Summary

[ An executive summary is a brief overview of a larger document’s purpose, results, and conclusions condensed for the quick reading of an executive or manager. It is placed at the beginning of a longer report or proposal and summarizes specific aspects of its content. The reader of the summary is usually not interested in the details of a project but is instead interested in costs, timeline, deliverables, and results.]

# Background

## Current Situation

[ This section defines the current state of a business process, system or both. It provides background and context in support of the next section, the Problem Statement. What are the pain points and drivers for action? Identify compliance, security or other risks that must be mitigated.]

## Problem Statement

[This section defines the problem that the project charter attempts to solve. Include any of the following as appropriate.

* purpose of project
* who benefits from the investment
* why this is a priority for consideration, include connections to strategic or technology directions and/or roadmap
* which service (or services) this project would support
* how the project contributes to increase strategic value and/or increase market penetration]

# Approach

## Goals

[This section should state the high-level, broad definition of what the group or organization wants to accomplish.]

## Objectives

[This section should communicate the project objectives which describe the desired results of a project, which often includes a tangible item. An objective is specific and measurable, and must meet time, budget, and quality constraints.]

## Solution Overview

[This section should communicate the high-level solution as proposed by this project charter. Further sections of this project will provide more detail.]

## In-Scope

[This section should clearly define the scope of the solution. A bulleted list with a brief description would be helpful.]

## Impacts on / Touch Points with Other Systems

[This section should identify the integrations with other systems inside and outside of the Division of IT. Be sure to address impacts on upstream and/or downstream systems, identify whether an integration needs to be built or whether the impacted system is indirectly impacted. This section is import to complete as it may also affect other staff resources who may not be called out explicitly on the project.]

## Out-of-Scope

[This section should clearly define what is outside the scope of the solution. A bulleted list with a brief description would be helpful. Description should answer why an item is not considered in-scope.]

## Benefits

[This section should list the benefits to be gained from completion of the project. Benefits to the Division of IT, Virginia Tech, or other significant stakeholders. Benefits can be tangible or intangible. Provide a brief description for each benefit listed.]

## Milestones and Deliverables

[This section should provide a high-level list of project milestones and their estimated completion date. Project deliverables can also be included as possible.]

|  |  |  |
| --- | --- | --- |
| **#** | **Milestone or Deliverable** | **Estimated Completion Date** |
|  |  |  |
|  |  |  |
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##

## Timeline (or Roadmap)

[This section should provide a rationale or reason for the timeline such as meeting compliance deadlines, award deadlines, staff availability, budget constraints, etc. This section should also include dates (and events) when delivery cannot be completed, such as year-end, commencement, etc.]

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** |
| Planning |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Requirements |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Design |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Development |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| QA Test |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| UAT Test |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Rollout |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

## Dependencies

[Include known internal project work dependencies, dependencies on specific resources, personnel, or roles, and any dependencies on other projects or other project deliverables.]

## Key Performance Indicators

[A Key Performance Indicator (KPI) is a quantitative measure used to evaluate project performance against expected results; they confirm that the project has achieved its objectives.

List one or more KPI’s that allow the University to measure the operational efficiency, improved accuracy and/or effectiveness because of this project. An example is, “Reduce the number of helpdesk incidents regarding account creation by 15% compared to the same time period last year.

If KPI’s cannot be defined then a list of metrics, success factors, and/or benefits should be described in this section.]

## Project Risks & Constraints

[Identify the assumptions that have a bearing on the project charter and that influenced your decisions in this document. Also include project risks and identify mitigation factors.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Risk/Constraint** | **Likelihood** | **Severity** | **Mitigation Plan** |
|  |  |  |  |  |
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# Resources

## <Program | Project> Governance



## <Program | Project> Roles

[**Sponsor:** Authorization/approval authority for the Program.

**Steering Committee**: Authorization authority designated by the program Sponsor to make decisions, resolve issues, and keep Sponsor informed of the status of the program.

**Coordination Team**: Small group that serves the Steering Committee, Project teams, and Sponsor by organizing presentation of issues and needs for the program. Facilitates meetings, tracks issues.

**Program Manager:** Overall program leader, accountable to the Sponsor for accomplishing the goals and strategic objectives of the program on time and within budget.

**Project Manager**: Responsible for ensuring adherence to project management standards, including monitoring individual project progress, and identifying risks to timeline, deliverables, or budget.

**Project Team Lead**: Individual who oversees the strategy for implementing one or more component projects prioritized by Steering Committee. Project Team Leaders of work groups that are involved in the implementation of one or more component projects.

**Work Group**: Technical staff responsible for the timely execution of all project tasks assigned to them by the team lead or project manager.]

## Roles & Responsibilities

[In order to clearly set expectations and understand responsibilities, define roles of each member or group of the project team. Note that not all roles may be used in all projects, and for some projects roles may be combined.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name**  | **General Responsibilities** | **Governance Decision Types** | **Estimated Time Commitment** |
| <Sponsor(s)> |  | * <Authorizes needed resources.
* The authorization/approval authority.
* May delegate that authority to identified members of the Steering Committee who provide updates on progress to the sponsor)s) they represent.
* Determines membership of the Steering Committee.>
 | * <Accountable for the direction and success of the program.
* Approval of major program direction as outlined in the Responsible, Accountable, Consulted, Informed (RACI) Model>
 |  |
| <Steering Committee> |  | * <The authorization authority as designated by the Sponsor(s).
* Make decisions regarding direction and policy implementation.
* Resolve issues that inhibit the Project Teams from making adequate progress.
* Responsible for keeping represented sponsor(s) informed on the status of the program.>
 | * <Accountable for the University wide decisions affecting progress.
* Prioritize authorized projects.
* Ensure that projects fill the needs of the university at large and meet university compliance requirements for technology initiatives.>
 |  |
| <Coordination Committee> |  | * <Serve the Sponsor(s), Steering Committee, and Project Teams by organizing presentations of issues and needs.
* Facilitate meetings of the Steering Committee and Project Teams.
* Provide other project management services such as issue tracking, risk assessment, and meeting minutes. (s) informed on the status of the program.>
 | * <None, this group provides coordination services only.>
 |  |
| <Program Manager> |  | * <Sets and reviews objectives
* Oversees integration of projects
* Negotiates resources, changes in plans
* Ensures appropriate and accurate communication>
 | * <Accountable to the Sponsor(s) for the direction and success of the program.
* Approval of major program direction as outlined in the Responsible, Accountable, Consulted, Informed (RACI) Model>
 |  |
| <Project Manager> |  | * <Monitors progress, adherence to scope, and identifies potential risks to the project schedule, deliverables, or budget.
* Advises on the potential impact of project changes to dependent tasks, milestones, and deliverables.
* Prepares and facilitates meetings.
* Prepares and presents progress reports.>
 | * <Accountable for project management decisions.>
 |  |

## Responsibility Assignment Matrix

### RACI Model

<In order to clearly set expectations and understand responsibilities, define roles of each member or group of the project team. Note that not all roles may be used in all projects, and for some projects roles may be combined.

A RACI model is used to clarify the roles of participants in completing tasks or in the resolution of issues. Identified are the team members or groups who may be **R**esponsible, **A**ccountable, **C**onsulted, or **I**nformed regarding a particular issue. As new kinds of issues are addressed, this analysis should be applied at the start of the solution process to avoid confusion regarding roles. A RACI model contains the following columns:

Decision Type/Tasks: This describes the potential decision points that may arise.

**R**esponsible: The group responsible for completing the work necessary to accomplish the decision/task.

**A**ccountable: The group accountable for the decision.

**C**onsulted: The members engaged in two way communication around a decision.

**I**nformed: The members receiving one way communication around a decision.

The RACI matrix models decision points that may be encountered. This matrix may be adjusted by adding different columns (such as Input, Perform, Verify, Sign off, and Recommend) as needed. Further decision points not addressed in the original charter can also be added with the approval of the sponsor(s). For more definition of the groups, refer to the previous section on Roles and Responsibilities.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Decision Type/Tasks** | **Responsible** | **Accountable** | **Consulted** | **Informed** |
| <Scope Change> | <Steering Committee> | <Sponsors> | <Coordination CommitteeProject TeamsProgram ManagerProject Manager> |   |
| <Schedule Change> | <Steering Committee> | <Sponsors> | <Project TeamsWork GroupsProject Manager> |   |
| <Budget Change> | <Steering Committee> | <Sponsors> | <Contract StaffProject Manager> |   |
| <Project Prioritization> | <Steering Committee> | <Steering Committee> | <Project Teams> | <Project Manager> |
| <Security Standards> | <Project Teams> | <Steering Committee> | <Work Groups> | <Project Manager> |
| <Data Model Standards> | <Project Teams> | <Steering Committee> | <Work Groups> | <Project Manager> |
| <Dashboard Standards> | <Project Teams> | <Steering Committee> | <Work Groups> | <Project Manager> |
| <Report Standards> | <Project Teams> | <Steering Committee> | <Work Groups> | <Project Manager> |
| <Metadata Standards> | <Project Teams> | <Steering Committee> | <Work Groups> | <Project Manager> |
| <Schedule Development> | <Project Teams> | <Steering Committee> | <Work GroupsProject Manager> |   |
| <Risk Plan Management> | <Project Manager> | <SponsorsSteering Committee> | <Work GroupsProject Teams> |   |
| <Vendor/Contractor Staff Changes> | <Coordination Committee> | <Sponsors> | <Work GroupsProject TeamsSteering Committee> | <Project Manager> |
| <Vendor Contract Adjustments> | <Coordination Committee> | <Sponsors> | <Steering Committee> | <Project Manager> |
| <New Decision Process> | <Steering Committee> | <Sponsors> | <Work GroupsProject Teams> | <Project Manager> |
| <Identify and Prioritize Representative Projects> | <Steering Committee> | <Sponsors> | <Work GroupsProject TeamsStakeholders> | <Project Manager> |

## Stakeholders

[Identify the people, groups, or organizations that could impact or be impacted by the project, especially if they are not mentioned above.]

# Communication Plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Audience** | **Vehicle** | **Frequency** | **Objective** |
| <Program Sponsors> | <Executive Committee Meetings> | <Bi-Monthly or as needed> | * <Receive status updates
* Address decisions needed
* Garner support and approval for critical activities>
 |
| <Steering Committee> | <Steering Committee Meetings> | <Monthly or as needed> | * <Monitor progress of project
* Prioritize work
* Designate project team members
* Resolve cross functional issues>
 |
| <Coordination Team> | <Coordination Team meetings> | <Weekly or as needed> | * <Prepare agendas for Steering Committee and project team meetings
* Review issues needing resolution
* Facilitate communication between committees.>
 |
| <Project Teams> | <Project Team meetings> | <Weekly or as needed> | * <Prepare to implement priorities of the Steering Committee
* Coordinate efforts across functional areas
* Raise concerns blocking the achievement of established goals and deadlines>
 |
| <Work Group Members> | <Collaborative environment> | <Ongoing> | * <Store all communication, meeting minutes, project documents, announcements pertaining to the project
* Perform the work to complete project deliverables>
 |
| <Virginia Tech Community> | <Virginia Tech Daily News> | <Monthly or as needed> | * <Make announcements directing readers to a news web page for information on the new services and changes>
 |
| <Public at Large> | <Web Presence> | <Monthly or as needed> | * <Convey external facing publicity>
 |

# Approvals/ Signatures

|  |  |  |
| --- | --- | --- |
| **ApprovalDate** | **Approver Name & Role** | **Approver Signature** |
|  |  |  |
|  |  |  |
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# Appendix