Project Charter

Project Charter
Project: XXXX

DOCUMENT FILE NAME (XXXX.DOCX)

AUTHOR: FIRST LAST

Using This Template

All Sections are required to be addressed, however if a section or subsection is not needed mark as N/A. If content exceeds two pages for any section, consider creating an external document as reference.

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To create a deliverable from this template:

1. Replace [bracketed text] on the cover, footer, and in sections as appropriate.

2. Modify stakeholders and sign off list as appropriate.

3. Adjust or Delete Watermark as appropriate.

4. Delete this page.

Template Revision History

Version	Date	Name	Description
1.0	10/26/2017	Rob Lloyd	Initial Version

NOTE: Please remove this page when creating this deliverable

REVISION HISTORY

Revision	Date	Author	Description of change
			Draft

Project Description:

Proposed Project Name:			
Dates:	Proposed Start and Finish Dates	Initiated/Declined	Designated Start
Sponsor:	Section	Sponsor Name, Email, and Telephone Number	
Description of Project:			
City Manager's Priorities Alignment:	☐ Safe City ☐ Inclusive City ☐ User-Friendly City ☐ Sustainable City ☐ Demonstration City ☐ Core IT		
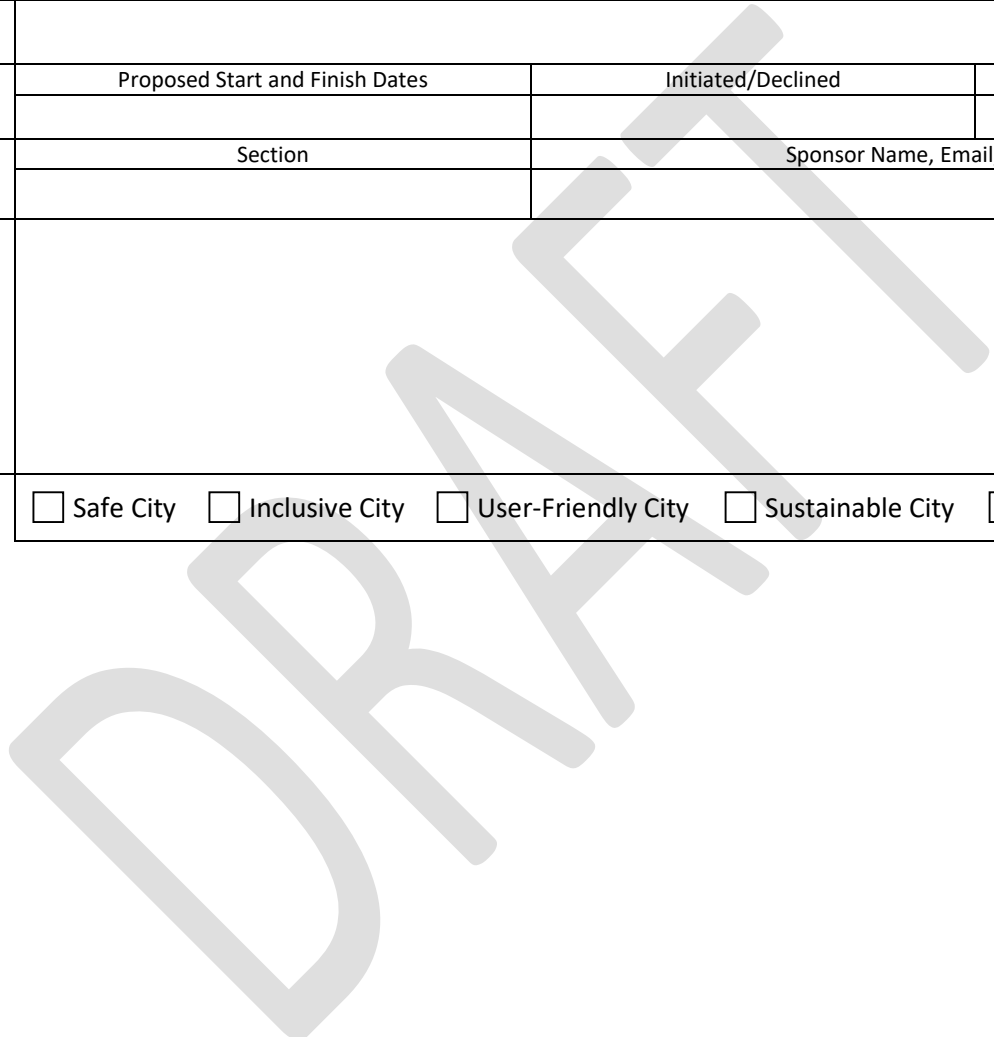
Reason Project is Required:			

Impact on Application and Server Systems:		Requires Upgrade	Requires Replacement

Impact on Network Systems:		Requires Upgrade	Requires Replacement

Project Budget:	

Funding:	Account String	Amount	Special Conditions

Procurement Approach:	Purchasing Representative	RFP / DEMO / Sole Source, etc….	Special Conditions

Planned Life and Replacement:	• [Projected Lifecycle] • [Year Due for Replacement]

Scope and Requirements:

Project Scope:	
Excluded from Project Scope:	•
Major Deliverables, Milestones, and Dates:	• [Preliminary WBS] • [Competing Commitments and Critical Path Issues] • [Critical Deadlines]
Stakeholders:	• [Internal] • [External]
Back-Out/Recovery Plan	• [Application] • [Database(s)] • [File System(s)] • [Network] • [Server(s)] • [Clients]
Private or Confidential Data Requirement and Handling:	
Risks and Assumptions:	
Specialized Security Required:	

Roles & Responsibilities:	Role	Responsibilities
	• Sponsors (Department + IT)	• Approve charter; Assign resources; Ensure effort fits City goals and priorities; Represent importance of effort in organization; Clear hurdles; Prioritize
	• Project/Scrum Master	• Manage project requirements and prioritization; Coordinate charter and resources for sprints; Monitor and communicate status to Project Team; Support sprints to ensure delivery within requirements
	• Technical Lead	• Author underlying code, database, interfaces, et al for a system; Technical resources for fit with the program architecture; Set development standards
	• Functional Leads	• Provide business expertise; Own process work will support; Assert requirements and prioritize; Work with team to create working functions/deliverables; Review/test work and provide timely feedback
	• Tester	• Execute system acceptance test for specific domain of operation.
	• Purchase Agent	• Manages the procurement process to ensure compliance with City municipal code requirements, policies, and procedures.

Assigned Staff Resources:	Staff Member(s) and Role	Time Required + Proposed Dates
	Project Management • [Name, Project/Scrum Master] • [Name, Sponsor] Functional • [Name, Functional Lead] • [Name, Functional Lead] IT • [Name, Technical Lead] • [Name, IT Architecture Review] **Total Number of Employees:**	Examples: Business Analyst – 100% allocation for 4 months – 680 hours Feb-May Business Analyst – 50% allocation for 8 months – 680 hours Feb-Sep • [Percent] allocation for [N] months - [Hours] hours [Date Period] • [Percent] allocation for [N] months - [Hours] hours [Date Period] • [Percent] allocation for [N] months - [Hours] hours [Date Period] • [Percent] allocation for [N] months - [Hours] hours [Date Period] **Total Estimated Project Hours:**

Project: [Project Name]

Start—Project Commitments:

	Name, Signature, and Date	Department and Job Title	Date	Telephone	E-mail
Sponsoring Director					
CIO					
Project/Scrum Master					
Functional Lead					
Functional Lead					
Technical Lead					
Technical Lead					

Proposed Start Date	Adjustment(s) and Reason(s)	Completion Date

End—Project Acceptance:

	Name, Signature, and Date	Department and Job Title	Date	Telephone	E-mail
Sponsoring Director					
CIO					
Project/Scrum Master					
Functional Lead					
Functional Lead					
Technical Lead					
Technical Lead					

Example WBS Framework (Agile)

No.	Item	Staff	Start Date	Due Date
1	Initiation—Charter accepted and approved by sponsor [Department Name] and Information Technology Department. Staff time and resources dedicated per charter for project work.			
2	Planning and Analysis—Business process defined by sponsor [Department Name] and the project team. Pilot testing and demonstrations as required.			
3	Design—New process and requirements of business system(s) defined and accepted by project team. Requirements list and functional testing script.			
4	Development—System, database, network, and programming work to meet requirements. Define by "sprint" to develop each function.			
4.1	Sprint 1—			
4.1.1	Function/Deliverable 1—			
4.1.2	F/D 1 Testing—			
4.1.3	Function/Deliverable 2—			
4.1.4	F/D 2 Testing—			
4.2	Sprint 2—			
4.2.1	Function/Deliverable 3—			
4.2.2	F/D 3 Testing—			
4.2.3	Function/Deliverable 4—			
4.2.4	F/D 4 Testing—			
4.3	Sprint 3—			
5	Backlog Check—Review features and functions not complete. Re/Prioritize.			
6	Communications and Training—Communicate changes before and during transitions. Education outreach for user and stakeholder transitions.			
7	Deployment—Distribute system for use. Implement heightened support model for transition period. Document, communicate, and resolve issues that arise.			
8	Transition to Support—Educate IT Help Desk staff and power users to handle Tier 1 issues and escalate. Publish clean knowledgebase and documentation to central repositories for access.			
9	Lessons Learned—Debrief on project successes and needed improvements. Archive project documents and materials.			