

**Project Charter**

*Revised by koah Barstead*

*May 13, 2024*

# Executive Summary

The Executive Summary provides a high-level overview of the document. Here, highlight the key ideas you want your audience to glean from your Charter, including the following aspects of your project:

* Background;
* Purpose;
* Issue/problem addressed;
* Conclusion;
* Relevant Recommendations.

Ensure that the Executive Summary appears on its own page and does not exceed one page.

# Project Purpose

## Problem Identification

This section is sometimes called the Business Need or Case section. Here, you will describe the problem you must solve, explain why it is a problem, and outline how you or your client knows it is a problem.

## Client Motivation

What are the goals the client hopes to achieve from this project? (These are the high-level business goals and even organizational values that this project will support.)

## User Profile

Agile is a user-centered methodology, and your project should certainly put the user first. Create a detailed vision of the project’s potential user to guide your project’s development. You may have to create more than one user profile depending on the different user groups who will interact with your project.

* Who is the intended beneficiary of your project?
* What do they need to get out of or do with your project?
* What might they want to get out of or do with your project? (Differentiate needs from wants.)
* How will they interact with the project?
* What is their relationship to the client’s company or organization?  (e.g., Are they developers with the company, clients of the company, the owner of the company?)
* What level of knowledge can you assume they have in relation to using your product?
* What will they need (e.g., documentation, explanations, tutorials) to effectively integrate, use, and maintain your product?

# Project Parameters

## Scope

In this section, you will establish what is explicitly in and out of scope.

### Deliverables

List the core deliverables for the project.

### Requirements

List the core requirements for the deliverables.

### Out of Scope

Here, articulate objectives that could inadvertently be considered in scope but that are in fact out of scope. Clearly articulating what is not in scope will help you avoid scope-creep in the future.

### Stretch Goals

Articulate any stretch goals (goals that you might accomplish if you finish the core deliverables early). Stretch goals are not part of the primary scope, but knowing what they are can help guide your project if you end up ahead of schedule.

## Constraints

Identify the various constraints you will have to navigate to complete the project.

### Time

Remember, your work on the project ends in July.

### Budget (optional)

Include your budget and budget breakdown here if you have one.

### Personnel

Consider each team member’s constraints. If you will be working closely with your client or other personnel outside of your team, consider their constraints, too.

### Resources

Outline any resources that you will need for your project but may have trouble accessing.

## Assumptions

Outline the various assumptions you are making about what your client, instructors, and your team members can provide in support of the project. By explicitly stating these assumptions, you can make sure a) you have assumed correctly and b) everyone agrees with these assumptions.

### Client

What assumptions do you have about what your client or client’s organization will offer throughout the term (e.g., technical support, communication, documentation, past iterations)?

### Instructors

What assumptions do you have about what your instructors can offer throughout the term (e.g., technical support, office hour availability, moral support)?

### Team

What assumptions do you have about your team members (e.g., what level of dedication, communication, and commitment do you expect from one another)?

### Resources

What resources do you assume you will have access to that will help you develop your project?

## Change Management

How will this project fit into the business? List the potential impact of the project on staff and customers. Will there need to be training manuals written or seminars offered? How will the business maintain the project or deal with technical issues after you have graduated?

## Risks

**Table [##]: Risk Management**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk #** | **Risk Description** | **Owner and Recommendation** | **Priority** | **Risk Treatment (Accept/Mitigate/Transfer)** |
| **(Ex.)** | **Team members fall ill and are unable to complete a core task on time.** | **Owner:** Team  **Recommendation:** All team members should keep a clear log of what they are doing so that they can transfer their responsibility to someone else as seamlessly as possible in the event of unforeseen situations. Members should inform the rest of the team ASAP if they are sick or otherwise unable to work on the project. | **High** | **Mitigate** |
| **(Ex.)** | **Yet to be determined requirements**  The project sponsor has yet to fully outline the analytics and telemetry constraints. | **Sponsor**  Allocate two sprints to analyze processes, data and define our approach to success. The core team will work with the Product Owner and Subject Matter Experts to validate the viability of developing these services within the previously identified project constraints. | **High** | **Mitigate** |

# Approach

In this section, you will explain your approach to the project. Most projects will follow an Agile methodology or something similar. An Agile development approach allows your team to begin work on well-defined initiatives while you simultaneously refine the specification of lesser-known features. Also indicate whether you are using sprint planning, stand-up/scrum sessions, and/or reviews. Include your check-in sessions with your team and faculty.

Your approach should capture your daily scrum sessions with your team to discuss progress, the plan for the day, and any issues. You should have a weekly check-in with faculty. What is your check-in schedule with your sponsor?

The goal is to follow the framework of your plan as much as possible while also being flexible as circumstances and academic demands shift. Make sure you provide a chart that captures your plan. A simple planning chart example with two-week sprints could look like the sample below:

**Table [##]: Sprint Charts**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Week 1 | | | | | | |  | Week 2 | | | | | | |
|  | Su | M | T | W | Th | F | S |  | Su | M | T | W | Th | F | S |
| Project Scoping |  |  |  |  |  | X |  |  |  |  |  |  |  |  |  |
| Client Check-in |  |  |  |  |  |  |  |  |  |  | X |  |  |  |  |
| Sprint Planning |  |  |  |  |  | X |  |  |  |  |  |  |  |  |  |
| Scrum Meeting |  |  |  |  |  |  |  |  |  | X |  | X |  | X |  |
| Instructor Check-in |  |  |  |  |  |  |  |  |  |  |  |  | X |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Week 3 | | | | | | |  | Week 4 | | | | | | |
|  | Su | M | T | W | Th | F | S |  | Su | M | T | W | Th | F | S |
| Project Scoping |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Client Check-in |  |  |  |  |  |  |  |  |  |  |  |  |  | X |  |
| Sprint Planning |  |  |  |  |  |  |  |  |  |  |  | X |  |  |  |
| Scrum Meeting |  | X |  | X |  | X |  |  |  | X |  |  |  | X |  |
| Check-in |  |  |  |  | X |  |  |  |  |  |  |  | X |  |  |

In addition to documenting your general sprint plan, please list the software and environments you plan to use for the purposes of project management and communication. Explain why these decisions will ensure a productive team dynamic.

# Skill Development and Learning Goals

One of the objectives of Capstone is to ensure you have the skills to attain employment after graduation. To this end, each major Capstone report (Charter, Progress, Final) will require you to reflect on job-related skills that you are developing through your project. You will begin this process in the Charter by reflecting on your current skills, the skills you want to develop, and your skill-based goals.

## Skills Inventory

Create a Professional Skills Inventory Table for each team member like the one below.

**Table [##]: Professional Skills Inventory Assessment from CamSTAR**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Competency** | **Beginning** | **Developing** | **Accomplished** | **Exemplary** |
| Initiative |  |  |  |  |
| Responsibility |  |  |  |  |
| Leadership |  |  |  |  |
| Teamwork |  |  |  |  |
| Conflict Management |  |  |  |  |
| Written Communication |  |  |  |  |
| Oral Communication |  |  |  |  |
| Decision Making |  |  |  |  |
| Problem-Solving |  |  |  |  |
| Critical Thinking |  |  |  |  |

## Learning Goals

Include a section for each team member that describes two learning goals they hope to develop over the course of the Capstone project:

* You must choose one soft skill and one technical still.
* Skills must be selected from the [list in the CAMSTAR module](https://camstar.camosun.ca/lessons/2-3-understanding-professional-skills-behaviours/).
* Provide a SMART goal for honing each skill.
* Offer a reason why these goals are important for your future career.

# Success Criteria

## Team

What criteria will your team use to determine whether the time and energy you put into this term (not just the delivered project) has been well spent and meaningful?

## Client

What does your client need to consider this project a success?

# Milestone Summary

Fill out the table below so that all major milestones in your project are included. Ensure your target dates are accurate and reasonable.

**Table [##]: Project Milestones**

|  |  |
| --- | --- |
| **Project Milestone** | **Target Date (mm/dd/yyyy)** |
| 1. Project Start | 05/02/2022 |
| 1. Project Charter | 05/15/2022 |
| 1. Final Client Demonstration | 08/12/2022 |
| 1. Symposium Presentation/Demonstration | 08/19/2022 |
| 1. Project Complete | 08/19/2022 |

# **Conclusion**

Your proposal must persuade and remind the team of the original goal of the project. Thus, end positively. Express confidence in your plan and your team. Sum up what you are prepared to do and what the reader will get. Finish with a clear and specific statement of what you would like the reader to do (include details like how, where, by when, and to whom) so that you can get started. Give the name of the team contact person.

# Authorization

## This section provides the names and authorization, once signed, for the project to move forward in accordance with the information contained in this charter. PLEASE leave this as a separate page. In the future this page will be removed and destroyed based on the requirements of the Freedom of Information and Protection of Privacy Act.

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Sponsor** |  |  |  |
| <Name> |  |  |  |
| *<Title>* | **Signature** |  | **Date** |
|  |  |  |  |
| **Team** |  |  |  |
| <Name> |  |  |  |
|  | **Signature** |  | **Date** |
| <Name> |  |  |  |
|  | **Signature** |  | **Date** |
| <Name> |  |  |  |
|  | **Signature** |  | **Date** |