# Activity: Digital Service Project Charter

# Facilitation Guide: Build Your Charter Together

**Time:** 35–45 minutes  
**Format:** Small groups (3–4 people), role-based activity

## Learning Outcome:Teach learners to define success, clarify roles, and establish a communication rhythm by drafting a lightweight project charter with their team—mirroring real-world collaboration between a CO, COR, and PO.

## Activity Setup:Divide participants into triads or small groups. Assign or let them choose roles:

* Product Owner (PO)
* Contracting Officer’s Representative (COR)
* Contracting Officer (CO)

Provide each group with a simplified project scenario (e.g., “Redesigning the agency’s benefits application portal”) and the charter template (printed or digital).

## Step-by-Step Instructions:

**Step 1: Define the Mission (5–7 minutes)**  
As a team, fill in the basics:

* Project name, contract number, and purpose
* Type of contract and period of performance
* What does “success” look like for this project?

**Step 2: Clarify Roles & Shared Responsibilities (8–10 minutes)**Based on the provided descriptions:

* Each role outlines what they bring to the team
* Groups discuss and add any shared responsibilities not in the charter

**Step 3: Build Your Communication Plan (10 minutes)**Create a simple cadence:

* When will you meet?
* What’s the purpose of each meeting?
* How will you share updates outside meetings?

**Step 4: Escalation and Celebration Plan (8–10 minutes)**Discuss:

* How and when should issues be escalated?
* What’s your plan for celebrating wins and maintaining morale?

**Optional Share-Out (5–10 minutes)**Have 1–2 groups quickly share highlights of their charter—especially anything creative or realistic they added.

**Debrief Prompts:**Use these questions to guide a short group reflection:

* What felt clear and easy to align on? What required the most negotiation?
* How does this activity reflect your real-life experience on projects?
* What ideas will you take back to your next kickoff or performance meeting?

Digital Service Delivery Project Charter

## Purpose:

This charter outlines how the Contracting Officer (CO), Contracting Officer’s Representative (COR), and Product Owner (PO) will work together to support agile product delivery under this contract. It defines roles, communication rhythms, and shared responsibilities to ensure consistent delivery, effective oversight, and adaptive problem solving.

### Contract Overview

Project Name: [Insert project name]

Contract Number: [Insert contract number]

Period of Performance: [Start date] – [End date]

Vendor Partner: [Vendor name]

Contract Type: [e.g., Time and Materials, FFP with Agile Ordering, BPA Call, etc.]

# Key Roles & Responsibilities

#### **Product Owner (PO) – Government Lead for Product Vision & Delivery**

* Owns and prioritizes the product backlog in alignment with user and mission needs
* Attends agile ceremonies such as sprint planning, retrospectives, and demos
* Provides ongoing feedback and acceptance of delivered work
* Collaborates closely with the vendor team and COR to assess delivery risks
* Maintains documentation of user needs, product vision, and success metrics

#### **Contracting Officer’s Representative (COR) – Oversight and Performance**

* Monitors contractor performance and alignment with contract terms
* Participates in sprint reviews and observes contractor team engagement
* Maintains sprint-level performance observations for QASP input
* Raises potential issues early and works with CO/PO on resolutions
* Supports retrospective and evaluation activities

#### **Contracting Officer (CO) – Acquisition Strategy & Governance**

* Oversees contractual compliance and administration
* Works with the COR and PO to remove acquisition-related roadblocks
* Participates in procurement-focused retrospectives and touchpoints
* Provides decision-making on contract scope, modifications, or escalations
* Helps maintain alignment between procurement strategy and delivery success

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#### Communication Cadence & Decision-Making

Meeting | Participants | Frequency | Purpose

* CO/COR/PO Baseline Check-ins | CO, COR, PO | Bi-weekly (first 3 months) | Review sprint performance, team health, delivery alignment, and clarify roles as delivery ramps up
* Ongoing Performance Syncs | CO, COR, PO | Monthly (after Month 3) | Monitor trends, address emerging risks, review progress toward goals
* Procurement Retrospective | CO, COR, PO | Quarterly | Reflect on procurement process effectiveness, review delivery performance, and propose improvements
* Sprint Reviews | COR, PO, Vendor Team | Every sprint | Review delivered work, observe collaboration, track team progress

#### Performance Monitoring and Documentation

The COR and PO will jointly observe and document contractor performance at the end of each sprint. Observations will include quality of work, responsiveness, collaboration, and alignment with priorities. These notes will be used to inform the Quality Assurance Surveillance Plan (QASP) and past performance documentation for future acquisitions. Observations will also support discussions during procurement retrospectives and potential contract modifications.

#### Issue Escalation Process

When issues arise (e.g., delays, misaligned delivery, non-performance), the team will:

* Raise the concern during regular touchpoints or asynchronously via agreed communication channels.
* Collaboratively identify the root cause and propose corrective actions.
* Document the decision or next steps.
* Escalate to agency leadership or vendor executives if needed.

# Celebrating Success

To promote a healthy team culture and recognize progress:

* The CO, COR, and PO will acknowledge milestone achievements during touchpoints.
* Sprint demos and reviews will include feedback and “what went well” moments.
* Team wins (e.g., user value delivered, problems solved) will be documented for internal knowledge sharing and morale.