PRJ 00000 PM2 Initiation Project Charter

**Project Charter**

**<Project Name>**

**General Information**

|  |  |
| --- | --- |
| Clarity Project #: | <PRJ-xxxx> |
| Project Name: | **<Project Name>** |
| Project Sponsor: | <Sponsor Name> |
| Project Manager: | <Project Manager Name> |
| Author: | <Author Name> |
| Attachments: | <Attachments Description> |
| Location: | <File Location in SharePoint/Documentum> |

**Revision / Change History**

|  |  |  |  |
| --- | --- | --- | --- |
| Revision Level | Revision Date | Revision Author | Description of Changes |
| 0.1 | <date> |  | Initial Version |
|  |  |  |  |

*This template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the particular project. The instructions should be deleted before distributing the document.*

* *Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*
* *Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.*
* ***Text and tables in black*** *are provided as boilerplate examples of wording and formats that may be used or modified as appropriate*.

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# Document Purpose

This Project Charter is the formal response to the demand request and formally authorizes the project to proceed to the Proposal Phase. It documents the Project Sponsor’s need and expectations about the project as known and understood at the beginning of the project. It includes the business or project objectives, critical success factors, high-level scope, key project stakeholders, known risks and issues, key assumptions, desired schedule and high-level budget estimate.

# Project Overview

## Executive Summary

*[Provide a high-level overview of why this project should proceed. State whether this project is a part of a larger initiative/Program. This summary is the ‘elevator speech’ to senior executives. Be brief. This information can be taken from the Clarity project properties ‘Project Description.’]*

## Background and Business Need

*[Summarize the current situation and briefly explain the business issue faced by the organization. Describe the opportunity for the organization to solve the problem.]*

## Strategic Alignment

*[Identify the 10-year markers (integrity, innovation, sustainability, customer satisfaction, continuous improvement, global growth, employee engagement and leader development, quality and shareholder value) and any applicable Business Unit and/or IT strategic objectives that this project is aligned with.]*

## Project Objectives and Success Measures

*[Project Objectives are concrete statements describing a particular desired outcome of the project. Next to each Objective, identify how it will be measured to determine completion. The successful delivery of each Objective will be documented in the Project Closure Report as a part of the Close phase.]*

|  |  |
| --- | --- |
| **Project Objectives** | **Success Measures (Completion Criteria)** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## Benefits

*[Provide a description of the soft and hard benefits that the project solution will provide. ]*

# Critical Success Factors

*[List all critical success criteria – what must the project team manage in order to have a successful project? Please note that these are not the specific criteria that will be used to measure project success or failure, but instead are the things the project requires in order to be successful. Examples: Key tasks, known risks, stakeholder engagement, external factors. ]*

# High-Level Scope Statement

*[Include a high-level description of the project boundaries that characterize the product, service or result that the project is meant to deliver. This is intended to provide the reader with a clear sense of what is being created by the project.]*

*[Optionally, if details are known at this point, the bulleted ‘in scope’ and ‘out of scope’ sections below outline the major activities required to successfully complete the project in a way that specifies what is in and what is not included, which provides an initial picture of the project boundaries. The boundaries of a small or medium size project can be defined in terms of activities while the boundaries of larger projects or programs may be defined in terms of work streams or subordinate projects.]*

## In Scope



## Out-of-Scope



# Assumptions, Dependencies, Constraints and Exclusions

*[Document any limiting conditions of the project that are known at this stage or have been taken into account while initiating the project. If information is not available for any of the following sub-sections, leave it as blank or “N/A”]*

## Assumptions

*[List all assumptions made when determining objectives, cost, dependencies, etc. for this project – what is the project team assuming at this point? Examples: Funding will be available by expected start date. Implementation Partner will have sufficient resources to meet project timelines.]*

* .

## Dependencies

*[List any known dependencies that will impact this project. Dependency may be on another project, a vendor release date or any other event. Identify each dependency and describe how the dependency will impact this project. This may include resources and/or schedule conflicts.]*

|  |  |
| --- | --- |
| **Dependency (Project/Event Name)** | **Description** |
|  |  |
|  |  |
|  |  |

## Constraints

*[List all known project constraints. Categories are included to ensure all areas are covered.]*

|  |  |
| --- | --- |
| **Category** | **Constraint** |
| Technology |  |
| Date |  |
| Resource |  |
| Budgetary |  |
| Regulatory (SOX, DOJ, Governmental, Legal) |  |

## Exclusions

*[List any specific scope area, deliverable, requirement, etc. that is specifically excluded from the project scope.]*

|  |  |
| --- | --- |
| **Exclusion Item** | **Description** |
|  |  |

# High Level Risks

*[Identify the overall risk profile for the project, based on the initial risk assessment completed in Clarity covering the following areas: Funding, Implementation, Interdependencies, Organization, Organizational Supportability/Flexibility, Project Controls, Resource Availability, Scope/Objectives/Requirements, Sponsorship and Technical. Additionally, if risk items are known, identify below.]*

# Budget Estimates and Funding Strategy

*[The Budget Estimate at this time will be high level estimates of expense items that may be used for portfolio and resource planning. If there is a range, pick the highest estimate to include in the table. Provide details of funding requirements and sources for completing the Initiation and Proposal Phases. Also provide the approach that will be followed for estimating and securing funding for the subsequent phases. ]*

The estimates provided below are very high level and are based on availability of vendor resources and estimates of vendor costs. These estimates will be validated during after planning of the project.

|  |  |
| --- | --- |
| **Total Estimated Project Cost**  (High level sizing estimate for portfolio and resource planning) | **$** |
| Assumptions: | |
| **Expected Budget Needed for Initiation/Proposal Phases** | **$** |
| Assumptions: | |

# Key Project Stakeholders

*[List the key roles and areas of the organization that must be involved to ensure success of the project. This includes key business resources areas as well as technology resources. If names are known, include in the table.]*

|  |  |
| --- | --- |
| **Project Role** | **Name/Title** |
| Project Sponsor |  |
| Project Steering Committee |  |
| Business Process Lead |  |
| IT Lead |  |
| Development Manager |  |

# Approvals

*[Actual approval may be in electronic format but authorized approvers for this document should be named here. ]*

The undersigned acknowledge that they have reviewed and approved this Project Charter for the *<Project Name>*. Changes to this document will be coordinated with and approved by the undersigned or their designated representatives.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Approval** | **Date** |
|  |  |  |  |
|  |  |  |  |

# Appendix: Attachments or Links

*[Attach any supporting information available. It is recommended to include the Project Storyboard or the originating Demand Storyboard from Clarity. Also include the SharePoint folder for the project that may contain any relevant documents. ]*