EIS Project Charter and Plan Development

IV. LESSON PROPER

Project Charter

A project charter is a formal, typically short document that describes your project in its entirety — including what the objectives are, how it will be carried out, and who the stakeholders are.

On the surface, a charter might not seem like a component of an agile project, however, from a product integration standpoint, it is a key document that is very useful for agile teams. This is because it helps to align the stakeholder expectations to the team's ability to deliver towards their expectations. Agile project charters can contain many categories of information but the main purpose is to provide clarity so that both the technical and business resources are on the same page. This will result in greater alignments across the organization.

Start with a Collaborative Kickoff Meeting

Begin with a collaborative kickoff for the entire team. This should include the: executive sponsor, product owner or service manager, project manager, and a designated team lead along with as many members of the strategy, discovery, and development teams as are known. This kickoff meeting should accomplish the following high-level goals:

- Align the teams with the business objectives for the project, so there is a firm foundation of understanding moving forward
- Create team energy around the common goal and an understanding of how each team member fits
- Discuss any issues or misunderstandings regarding the project

The kickoff meeting should also lay the groundwork for agile charter activities. It is a collaborative process that includes everyone involved in the success of the project and allows participants to decide what is important, what is useful, and how the team should interact throughout the lifecycle of the project. Agenda items of the kickoff meeting may include:

- Project Vision: Why does the project exist?
- Success Criteria: How will you know when the project is complete and the vision is realized?
- Stakeholders: Who is involved and/or affected by this project?
- Project Risks: What are the top risks of this project?

- Responsibilities: What roles are needed and who is doing what?
- Project Size and Complexity: What is the size and degree of difficulty of this project?
- Product Roadmap: What is the strategic view of where the product is headed?

Once the charter has been drafted, it goes to the Executive Sponsor for approval. Understand that the approved charter should not be filed away and forgotten about. In order for it to be effective, it must be easily accessible to all members of the team. This way, it can be referenced as needed and team members can see if and when updates to the charter are necessary as the project transitions into performing discovery.

Components of an Effective Project Charter

What makes an effective agile project charter? An agile project charter should align the project with the organizational strategy and concentrate the team's focus. Having the right mindset will help as well, and you should already be thinking in terms of increments or iterations. The agile project charter will be used to generate a clear statement of the problem and its solution and should be:

- **Concise**. Consistent with the "sufficient" philosophy of using an agile methodology. The charter should have just enough information to provide appropriate decision-making. Short and to the point works best.
- **Understandable**. Separate the legal jargon and other unnecessary information into other documents. This will help save time and makes things easier for those reading it.
- **Collaborative**. Agile projects are collaborative. The charter should involve the input of the team and organization's governance (for example input from the Executive Sponsor). The charter should also include what was discussed and agreed upon in the kickoff meeting.

The following table provides a list of charter elements and what the focus of each should be. Note that depending on the project the agile project charter may include additional elements than what is listed here.

Charter Element	**Focus**
Vision	The "why" of the project. The goal is to have a compelling and clear vision for the effort.
Objectives	This is the "What" of the project and it states what will be done in the project to achieve its higher purpose. This should include technical, business, product, and team objectives.
Project Size Estimate	An assessment of how big the resources will be needed to deliver this service based on assessment of resources and organizational readiness for agile.

Project Complexity Estimate	An estimate of how complex delivering this service will be based on assessment of scope and organizational readiness for agile.
Scope	Known/assumed customer needs, anticipated functional and non-functional requirements.
Organization	Executive/Stakeholder, project team organization chart (especially if there are multiple teams operating at the same time), organizational governance structures.
Resources	Space, equipment, people/roles, skillsets and capabilities, collaboration support, and tools. While you may not have names for all the teams that you will form for the project, you should have an idea of what roles you think you will be needed.
Approaches	Strategies, methodologies, processes, tools and techniques the team will follow.
Success Criteria	What determines the success outside the solution itself? Should be concise, realistic, and directly measurable.
Priorities	Ordering, importance, and trade-offs within the project objectives (simulates a high-level product roadmap or release plan) as well as relative to other projects the organization is sponsoring.
Product Roadmap	Defines where the product is headed and is tied to the vision and strategic goals. This is a key element that should be included.
Assumptions and Constraints	Restrictions, limits, boundaries that apply to the team, process, product, and/or schedule.
Risks & Issues	Top risks, known issues, and relevant organizational history that impacts readiness, specific points of uncertainty, and which includes mitigation plans for each.
Sign-off	Key stakeholder approval that authorizes the project and other necessary signatures.

Estimating Project Size

Sizing a project determines how many resources and how much time will be needed to deliver. The size of the project can also be used to determine the extent to which project management practices are formally applied to the project. Determine the project size estimate by using the estimated amount of time the effort will take and its estimated cost. Below is a table that that can be used to assist in ascertaining if your project should be classified as small, medium, or large/mega.

Project Size Estimate		
Small	**Medium**	**Large/Mega**
Duration: less than 6 months	Duration: 6 months to 1 year	Duration: more than 1 year
Cost: less than $500k	Cost: $500k to $2 million	Cost: more than $2 million

Estimating Project Complexity

Once project size has been estimated it is a good idea to determine the project complexity—doing this will help to prepare the team and flush out where you may need to focus your attention. Estimates using team experience, similar technology, complexity of stakeholder groups, whether it is greenfield development (a new product/service) or legacy replacement, and any organizational changes needed based on the Agile Readiness Assessment should be taken into consideration.

Keep in mind the experience of your team when using a similar technology. Does the team have no experience, limited experience, or extensive experience? Use a similar approach to gauge the complexity of Stakeholder Groups. Then once you have estimated project complexity, be sure to document this information in your charter.

What is Project Planning?

Agile planning is a project planning method that estimates work using self-contained work units called *iterations* or *sprints*. Sprints are periods of 1-3 weeks in which a team focuses on a small set of work items, and aims to complete them. Agile planning defines which items are done in each sprint, and creates a repeatable process, to help teams learn how much they can achieve.

How is agile planning and estimation different?

It breaks down software development into small, self-contained units, which can deliver value to a customer. Teams don't try to plan the "big product" all at once. They plan for what they can accomplish to satisfy a customer in a short period of time.

In this post we provide a step-by-step guide to breaking your project down and planning in small iterations, to deliver reliably every time.

4 essential components

1. An agile project plan is divided into releases and sprints

Agile planners define a release, which involves creating a new product or substantially updating an existing product. Each release is broken down into several iterations, also called *sprints*. Each sprint has a fixed length, typically 1-2 weeks, and the team has a predefined list of work items to work through in each sprint. The work items are called *user stories*.

The release plan is broken down into several iterations (sprints) that include user stories (items)

2. Planning is based on user stories

A *user story* briefly describes a need experienced by your users. For example:

- "As a team member, I need to know which tasks are currently assigned to me"
- "As a team leader, I need to receive email notification when a task is stuck or behind schedule"

Unlike in traditional project management methodologies like *waterfall*, in which teams would create detailed technical specifications of exactly what they would build, in agile planning, the team only documents **what the user needs**. Throughout the sprint, the team figures out together how to address that specific need in the best way possible.

3. Planning is iterative and incremental

The agile process is focused on the concept of iteration. All sprints are of equal length, and an agile team repeats the same process over and over again in every sprint. Each sprint should result in working features that can be rolled out to end-users.

An iterative process allows the team to learn what they are capable of, estimate how many stories they can complete in a given timeframe (the team's *velocity)* and learn about problems that impede their progress. These problems can be taken care of in subsequent sprints.

4. Estimation is done by team members

A core ethic of agile planning is that development teams should participate in planning and estimation, and not have the work scope "dictated" to them by management.

In this spirit, agile planning allows teams to assign *story points* to user stories in the release plan.

What is a story point?

In agile methodology, a story point is a number that reflects the complexity or amount of work involved in developing a user story. For example, a team can assign 1 point to a simple user story, 2-3 points for moderately complex and 4-5 points for a big story – based on their understanding of the work involved.

An alternative estimation unit for agile stories is *ideal time*: how long a user story should take to develop, assuming zero interruptions.

Sample: Project Charter

PROJECT:	ClickIT
DATE:	Revised as of November 11, 2019
AUTHOR:	SRG – ClickIT Project Team
VISSION:	The ClickIT Project Team envisions develop a system that help the students, professors and school officials to relief their concerns in terms of reporting and monitoring of the problems and incidents inside the university. The best possible aid for their problems and concerns is to create a mobile application. And through the development of mobile application and web application, handling and monitoring of the reports of the students and professors will be done in less effort giving them a fast and reliable service.
OBJECTIVE:	The objective of the project will be discussed in terms of modular division. The following objectives are based on the project team's understanding of the business process, therefore, using it as a basis for creating a technical view of the objectives of the system. **1. Registration** a. To create a system that will allow the Admin to create their own account to the system, together with their personal information to be included. b. To create a system that will keep the record of all Clicker that is registered in the system. **2. User Account Management** a. To create a system that will allow the system administrator to manage the user accounts of the system. It includes the ability to modify, archive, backup of the data of the users, and the adjustments of user roles per user type in the system. **3. Reporting Management** a. To create a mobile application that will allow the Clicker to send a report with a video or image attachment.

	b. To create a system that will allow sending the reports to the respective departments. c. To create a mobile application that will allow the Clicker to send a report anonymously. d. To create a system that will allow categorizing the report as environment issue and student issue. **4. Monitoring Management** a. To create a system that will monitor the reported concerns and issues inside the university. b. To create a system that will filter the reports as solved, validated and invalid reports. **5. Rewards Management** a. To create a mobile application that will allow the Clicker to redeem his or her points. b. To create a system that will give corresponding reward for each point.
PROJECT SIZE ESTIMATE:	The proponents estimated 4 months to finish the whole system. The estimated cost for the whole will be around a hundred thousand pesos, including the software and hardware components of the system.
PROJECT COMPLEXITY ESTIMATE:	The development team estimated the complexity of project ranging between mediums to highly complexity.
SCOPE:	**Registration** The clicker can only register in the mobile application. The admin will be the only one that will encode or input the details of the clicker in the system. **User Account Management** The system administrator cannot change the details of the users without their prior notice and given permission to do so. **Reporting Management** The clicker has the ability to send reports with image and video attachment and can be able to report anonymously. The reported problems or incidents shall be validated first by the Middleman before sending it to the respective departments. **Monitoring Management** The clicker has the ability to send reports with image and video attachment and can be able to report anonymously. The reported problems or incidents shall be validated first by the Middleman before sending it to the respective departments. **Rewards Management** The OSAS Head can only give a reward to the Clicker for reporting such problems or incidents occurred inside the university.
ORGANIZATION:	Here are the following people in the organization behind the Project: **Professor Rosicar Escober,** the project owner of the system whose responsible for: 1. Providing strategic direction and guidance 2. Approving changes to the scope 3. Making the business/approach decisions for the project 4. Participating in key activities 5. Making the resources available 6. Approving work products, address issues, and approve change requests **Mr. John Edcel Zenarosa** a full stack developer of the web-based version and mobile application of the system and also the Scrum Master of the team whose role is to: 1. Manage, review, and prioritize project work plans 2. Provide status reports 3. Manage project team 4. Recommend changes, escalate issues, and mitigate risks **John Henry Fernandez and John Gaden,** who is responsible for the team focusing mainly on the user interface and for the Quality Assurance. **Ms. Lea Mae Cervantes**, the Business Analyst, Quality Assurance and the Document Analysts of the team.
RESOURCES:	In order to complete this project, the team gathered information and manage resources to create this document as part of a project charter. The resources contain some materials and specific skill sets in terms of reporting, monitoring and the computer.

	Professor Rosicar Escober as the adviser and the project owner, she provides everything the team needs materially. In addition, she is also hands-on to check the overall quality of the system after the team's QA checks the functionality of the system.
APPROACHES & METHODOLOGY:	The researcher used purposive sampling technique as the research relies on how the respondents assess and evaluate the created web application and mobile application and how it is useful for them. For the Software Development, the researchers used the well-known Agile Methodology, which is a mixture of incremental and iterative process model, that focuses on customer fulfillment and process adaptability by immediate delivery of working software product.
SUCCESS CRITERIA:	As long as the system works properly before the semester ends, the team can conclude that the project is definitely successful. However, it has to be accepted by the client, and note that Professor Escober should approve it.
PRODUCT ROAD MAP:	The Team is aiming to achieve stakeholder's desire by completing their requirements while ensuring the quality of the system. The product roadmap of ClickIT will describe the tasks and priorities in a visualized manner. The product roadmap progress scope is only limited to 2 sprints (22 weeks), from 2nd week of July up to the end of the week of December. The consumed efforts are measured and plotted in days, 22 weeks = 168 days.
ASSUMPTIONS & CONSTRAINTS:	The project team needs to submit the system within the date of a submission and system's process must align to the stakeholder's user's stories and the methodology that the team used. The product must be functional and efficient to use ensuring the quality in the development is a must. The output of the project must meet the stakeholder's need and the team will expect or rather will be prepared to encounter different issues along the way such as technical issues, and delays in schedule backlogs.
SIGN OFF:	The project team will be open to provide a monthly maintenance inclusive only for a limited time to keep the system in its running standards until to its stable implementation, and to provide knowledge to the users by conducting instructional seminars on how the system works, and to train an expert that will handle the system in the long run.

Sample: Project Plan

TASK NAME	RESPONSIBLE MEMBER	START	END	DAYS	STATUS
Registration				13	
Short Term: Can add clicker details and other personal information to the system.	Developer			5	DONE
Long Term: Integration of their details to the mobile and web application.	Developer			13	ONE
User Account Management				13	
Short Term: Can be able to modify user accounts details.	Developer			6	DONE
Long Term: Can be able to archive and modify their user roles and system access.	Developer			13	DONE
Reporting Management				13	
Short Term: Can be able to send reports to the respective departments; can be able to send report anonymously	Developer			6	DONE
Long Term: Can be able to send a report with a video or image attachment; can be able to categorize the report as environment or student issue.	Developer			13	DONE
Monitoring Management				13	

Short Term: The ClickIT Application can be able to filter the reports as solved, validated and invalid reports.	Developer			6	DONE
Long Term: The ClickIT Application can be able to monitor the reported concerns and issues inside the university.	Developer			13	DONE
Rewards Management				13	
Short Term: The ClickIT mobile application can be able to give corresponding reward for each point.	Developer			6	DONE
Long Term: The Clicker can be able to redeem his or her points.	Developer			13	DONE
Other Task (General)				26	
Database Planning	Developers, Scrum Master			26	DONE
Documentation	Document Analyst			10	DONE
ClickIT Application Information Security	Developers			8	DONE
ClickIT Integration	Developers			3	DONE
ClickIT Dashboard Analytics	Developers			6	DONE