Project Charter

<Project Name>

Version x.x, Date

<Replace Version x.x with Version 1.0. Replace the current date with the last date modified. Be sure to update the date on the Revisions page.>

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List of Figures

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Project Charter

Banner Student Accounts Receivable Assessment Initiative

Project Sponsor: *<Name>*

Project Stakeholders: *<Name>*

Document prepared by: *<Name>*

Document date: *<Date>*

Approver(s)

_____ _____
<Name, Title>   *<Date>*

_____ _____
<Name, Title>   *<Date>*

_____ _____
<Name, Title>   *<Date>*

Revisions

Revision Number	Date	Description
<Begin revision history after first, non-draft release.>	*<Date in the format month day, year>*	

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Purpose of the Project Charter

The Project Charter serves several purposes:

- Clearly states the problem that needs to be solved

- Suggests an initial approach to solve the problem

- Defines high-level expectations

- Establishes a Project Charter Statement

- Serves as sponsor's authorization to proceed to Initiation phase

The Project Charter is a pre-requisite to performing the Initiation phase of a project. The Project Initiation phase brings together key team members through a structured process to identify the project requirements, to set expectations, uncover hidden issues and misunderstandings, and lay the foundation for a successful project by developing agreed-upon objectives, tasks, schedules, and project requirements.

Problem Definition

Define the business problem that needs to be solved, and document the background of the problem.

Clarifying Questions

1. *Why is the project being commissioned?*

2. *What are the business needs that this project will solve?*

3. *How will this project improve the business?*

4. *What is the basic project objective?*

Initial Approach

Document the initial thoughts on how the problem will be approached, supporting the charter statement.

Clarifying Questions

1. *What deliverables are expected from this project?*

2. *How will the stakeholders know this project is successful?*

3. *What metrics does the sponsor think should be tracked to know if they are satisfied with the project?*

4. *How much risk can the project team take on to ensure the efforts meet the client's success criteria?*

5. *How much risk is the organization willing to accept (for example, staff stress levels, organizational change tolerance, etc.)?*

6. *Are there any specific issues that should be noted (for example, policy changes, requirement to be emphasized or eliminated, etc.)?*

Assumptions and Constraints

The known assumptions and constraints that will affect this project are listed below:

<u>Assumptions</u>

Example Assumptions may include:

- *resource availability*

- *specific vendors or systems*

- *phasing approach*

- *specific organizations or geographic areas*

<u>Constraints</u>

Example Constraints may include:

- *Predefined budget?*

- *Required project finish?*

- *External impacts?*

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Project Flexibility

During the project definition process, the project team will require guidance regarding flexibility of scope, schedule and resources.

Clarifying Questions

1. *As project boundaries or constraints are being identified, how do you want the project team to handle them?*

2. *Can the Project Scope be broadened?*

3. *Can the Project Cost increase, and by how much?*

4. *Can the Project Schedule be extended, and by how long?*

5. *What is the relative flexibility of Scope, Schedule and Resources (least flexible, somewhat flexible, most flexible)?*

Charter Statement

What is the overall vision that this project will support?

Example:

To be the industry leader in our ability to procure products and services through a real-time e-commerce procurement solution with automated workflow processes.

Note: *The charter statement is more strategic in nature than a Project Objective Statement (POS), which specifically addresses project scope, schedule and resource goals.*

Key Contacts

The following individuals will be participating in the initial project definition effort.

Name	Project Role	Organization	Contact Info
	Project Sponsor		
	Stakeholder/Subject Matter Expert (SME)		
	Stakeholder/SME		
	SME		
	Project Management Oversight		
	Project Manager		

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Sponsor's Authorization to Proceed

<Name>, Project Sponsor, authorizes the following actions to further address the business needs stated in this charter:

1. *Example: To proceed with the high-level tasks outlined in the project approach.*

2. *Example: Perform a Project Initiation Workshop (PIW) to define project requirements.*

3.

4.

5.

Appendix A: Glossary, Terms, and Acronyms

FSS	Financial Systems Support
GW	The George Washington University
ISS	Information Systems Support
PIW	Project Initiation Workshop
POS	Project Objective Statement
SME	Subject Matter Expert