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| Project Name: |  |
| UM Business Unit(s): | MU UMSL UMKC S&T MUHC UMSYS |
| Governing Body: |  |
| Executive Sponsor: |  |
| Project Manager: |  |
| Charter Authors: |  |
| Strategic Levers: |  |
| Related Project#: | (Future Use. Remove if not needed) |

Purpose: The purpose of a project charter is to formally begin a project and authorize the Project Manager to assign resources, build a project plan, and spend money to accomplish work. This document indicates formal agreement of the scope of work. Any changes to the goal, deliverables and milestones, scope or budget require an approved change request and revisions to this document.

1. Project Overview

*(Briefly introduce the project. Describe the rationale/business justification for undertaking this project. Describe the type of the project as lifecycle or new initiative. Explain how this project came about, why we are undertaking it, and what problem or opportunity it is addressing. Describe the result of not undertaking this project. Explain how it will benefit the University.)*

1. Goal

*(The goal of the project is a very broad statement. At the end of the project, what do you hope to achieve?)*

1. Objectives & Deliverables

*(Project objectives are more precise than the project’s goal and should describe major things you have to do to achieve the goal. Deliverables should be tied to the specification requirements the customer will submit. List objectives: “To accomplish this goal the following will be done…”. For each objective, list deliverables: “The following will be delivered as a result of accomplishing this objective…” )*

* 1. *(Objective 1)*
     1. *(Deliverable)*
     2. *(Deliverable)*
  2. *(Objective 2)*
     1. *(Deliverable)*
     2. *(Deliverable)*
  3. *(Objective 3)*
     1. *(Deliverable)*
     2. *(Deliverable)*

1. Milestones

*(For major objectives and deliverables, list tentative milestone dates. Add tolerance +/-% or best/worst-case scenario on milestone dates. If tolerance exceeds expectations, charter must be reviewed and go through Change Management process.)*

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| --- | --- | --- |
| Milestone | Estimated Completion Date | Tolerance +/- days, weeks, months |
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1. Scope

*(Specify what work is IN SCOPE and what work is OUT OF SCOPE. Indicate the business functions and processes that are defined and/or supported by this project.)*

* 1. Scope Inclusions
  2. Scope Exclusions

1. Stakeholders

*(List all individuals or groups who may be impacted by the project or whose interests should be taken into account throughout the project. Include those internal and external to the University. It could include internal and external customers, end users, support providers, sponsors, boards or councils, higher level management, etc.)*

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| Name of Group or Individual | Organization & Org Role | Interest in Project |
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1. Resources & Budget

*(List all resources needed for the project. Items could include technology, equipment, supplies, human resources (individuals or teams), services, materials, training, etc. Add tolerance +/-% or best/worst-case scenario on resources and budget. If tolerance exceeds available resources or budget, charter must be reviewed and go through Change Management process.)*

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| --- | --- | --- | --- | --- |
| **Anticipated Resource Requirements** | |  |  |  |
| **Resource** | **Category** | | **Related Expense Estimate** | **Justification** |
| [Type name of item here. Snag it, laptop, DBA, Programmer, Developer, war room, HEUG, etc ]. | [Type category here: Software, Hardware, Materials, Human Resource, Space, Training, Consultants, etc] | | [Type estimate here, if known or applicable] | [Type description of justification here] |
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| Anticipated Budgetary Impact | |  |
| **Capital Expenses (Estimates)** | **Project** | **On-going** |
| Hardware |  |  |
| Software |  |  |
| Installation Services |  |  |
|  |  |  |
| **Operating Expenses (Estimates)** | **Project** | **On-going** |
| Salaries |  |  |
| Benefits (FY14 & FY15 is 35.37%) |  |  |
| Maintenance (Software and Hardware) |  |  |
| Depreciation of Hardware |  |  |
| Other |  |  |
|  |  |  |
| TOTAL BUDGET: |  |  |

1. Interdependencies

*(List other projects, systems or groups with which this project will interface/impact.)*

* 1. Projects
  2. Systems
  3. Groups

1. Assumptions & Constraints

*(List primary assumptions and constraints in terms of resources, policies, schedules, technologies, etc. Examples might be:* ***Time****: Is there a deadline to be met or a scheduled demand? Is there hardware involved that is scheduled for decommission?* ***Budget****: Are there capital budget issues above and beyond the cost of salaries and benefits? How will project results be billed?* ***Resources****: Are there key staff who are required for this project? When will they be available? What happens if they are replaced / move on?* ***Quality****:  What standard of quality is required?)*

* 1. Assumptions
  2. Constraints

1. Risks (SWOT analysis)

*(Describe any uncertain event that, if it were to occur, may have a favorable or unfavorable effect on the project’s objectives. One of the tools for identifying risk is to brainstorm assumptions and constraints about the project. Another effective tool is a SWOT analysis. This tool helps the project team identify Strengths, Weaknesses, Opportunities and Threats they may encounter in the project. Include risk mitigation strategies if possible.)*

* 1. Risk
  2. Risk

1. Project Charter Approval and Acceptance

*(List the names and project roles of the individuals who must approve the charter. Approval of this document authorizes resource assignment, spending authority, and the start of project work. Upon approval, a project plan must be developed in order to achieve the identified scope within the document. This charter is the foundation for the project and should be updated if there are any approved scope changes.)*

Decision:

🞎 Approved, development of detailed project plan is authorized

🞎 Approved, project execution is authorized (no further Project Manager involvement)

🞎 Approved, but project is on hold until future notice

🞎 Revise charter and resubmit for approval

🞎 Charter and project proposal are rejected

If this Charter is approved, the development of a Project Plan will begin. The Project Plan is expected to be delivered by: *(date)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Project Role** | **Name** | **Signature (Electronic is acceptable)** | **Date** |
| Executive Sponsor |  |  |  |
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| SPMO Director | *(signature indicates acceptance of the project into the portfolio)* |  |  |

1. Revision History

*(All versions of the charter are important. Any changes to the goal, deliverables and milestones, scope or budget require an approved change request and revisions to this document. When a change is approved, the charter should be updated by selecting “Save As,” renaming with the next version integral number (i.e. v2, v3, v4, etc.) and making all changes.)*

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| **Version** | **Date** | **Link to Approved Change Request** | **Executive Sponsor Sign off on Charter Changes** |
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