**ITS PROJECT CHARTER**

The Project Charter is used to initiate the project effort. It captures requirements, assumptions, risks, and deliverables needed to effectively scope the project. It provides the “definition of done” that will be used moving forward throughout the project lifecycle.

**DEPARTMENT / OFFICE NAME:** **<Name>**

|  |  |  |  |
| --- | --- | --- | --- |
| **KEY PROJECT INFORMATION** | | | |
| *This table should be completed by ITS PPMO POC or the Project Manager, as it provides general information about the project.* | | | |
| **PROJECT NAME** |  | | |
| **SPONSOR NAME** |  | **ITS OWNER NAME** |  |
| **SPONSOR ORG** |  | **ITS PROJECT MANAGER** |  |
| **SPONSOR POC** |  | **SPONSOR PROJECT MANAGER** |  |
| **IMPACT GROUP** | <Faculty / Staff / Students> | **IMPACT SCOPE** | <All / High / Medium / Low / None> |
| **AUDIT TASK NUMBER(S)** | <List all audit task number(s) associated with this project or enter ‘N/A’> | | |
| **ITS SERVICE TICKET(S)** | <List all related ITS PPMO, ITS Communications, and ITS ASRB service tickets here or enter ‘N/A’> | | |
| **MASON STRATEGIC PLAN ALIGNMENT** | <List the Mason goals the project will address or enter ‘N/A’> | | |
| **DOCUMENT AUTHOR** |  | **DOCUMENT DATE** | <MM/DD/YYYY> |

|  |  |  |  |
| --- | --- | --- | --- |
| **REVISION HISTORY** | | | |
| **VERSION** | **DATE** | **ORGANIZATION/AUTHOR** | **DESCRIPTION OF CHANGES** |
| 1.0 | <MM/DD/YYYY> | <Organization / Name> | Baseline version |
|  |  |  |  |
|  |  |  |  |

| **NOTE TO ALL USERS** |
| --- |
| Helper-text in white table cells bound by “< >” are designed to help the user with content. Once the user starts typing, the helper texts will automatically be written over and removed.Texts in table cells shaded gray are fixed and shouldn’t be edited.  After completing document, update the **Table of Contents** by “right-clicking” and selecting “update field” to update the page numbers for each section as they may have changed. Make sure to update the cover page, version history, and headers/footers as well.  If you have any questions about this template or the IT Project Management Lifecycle, please contact the ITS Portfolio and Project Management Office at [pmo@gmu.edu](mailto:pmo@gmu.edu). |

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| **EXECUTIVE SUMMARY** |
| --- |
| *Provide a brief description of the project, the issue/s the project will resolve and the capabilities that the project has to offer. Also, mention names of vendors, if any, that are involved on the project* |
|  |

| **PROJECT DESCRIPTION** |
| --- |
| *Provide a brief description or overview of the project and proposed solution including but not limited to what it is and what it will do.* |
|  |

| **GOALS** |
| --- |
| *Goals are high-level statements that provide the overall context for what the project is trying to accomplish. The goals for this project are divided into business goals and project goals.* |
| **BUSINESS GOALS** *Business Goals detail the specific outcomes expected from an organizational perspective and clearly define the value added to the overall enterprise. The specific business goals are:* |
| 1.  2.  3. |
| **PROJECT GOALS** *Project Goals are more specific and detail expectations of the project team around execution, minimum quality standards, budget requirements and meeting minimum-required IT security standards. The specific project goals are:* |
| 1.  2.  3. |

| **OBJECTIVES** |
| --- |
| *Objectives define strategies or implementation steps to attain the identified goals. Objectives are concrete statements describing what the project is trying to achieve. The specific objectives for this project are:* |
| 1.  2.  3. |

| **SUCCESS CRITERIA** |
| --- |
| *List and describe the criteria that will be used to measure the success of the project. These criteria should be tied to the project goals/objectives listed above. Include the current state of those criteria and expected outcomes. Target state must be specific and measurable to demonstrate project success. High-level examples include improved efficiency and customer satisfaction and decreased organizational risk. A general project success criterion is included to start the list.* |

| **SUCCESS CRITERIA**  *Increase/Decrease/Improve <Some Value>* | **CURRENT STATE**  *Current measurement of the value* | **TARGET STATE**  *Desired measurement of the value that will demonstrate success.* |
| --- | --- | --- |
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| **PROJECT SCOPE** |
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| *Describe the overall scope of the Project. Project Scope definition is required to ensure that a project includes all the work and activities necessary to fulfill the goals successfully. It is concerned primarily with controlling what activities fall within scope and what is outside of scope.* |
| **The project includes the following:**  *What is “in scope”* |
| 1.  2.  3. |
| **The project *does not* include the following:**  *What is “out of scope”* |
| 1.  2.  3. |

| **KEY PROJECT DELIVERABLES** |
| --- |
| *This is the “definition of done” for the project. Project deliverables should be specific, measurable, and testable. Specific timelines, durations or dates are not required, but note them where possible as appropriate. Be sure to include any externally required deliverables where applicable (e.g., mitigations to findings from ASRB).* |

| **DELIVERABLE** | **DELIVERABLE DESCRIPTION** | **TIMING** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| **PROJECT COMPONENTS** |
| --- |
| *Identify which types of work may be needed to complete the project. Place an ‘X’ next to the work areas required in the list below. This assists with planning project resource needs.* |
| |  |  |  |  | | --- | --- | --- | --- | |  | Service Design |  | Network / Firewall Configuration | |  | Process Design |  | Managed Servers | |  | Architecture and Business Analysis |  | Account Provisioning / De-provisioning | |  | Project Management |  | Server Co-location | |  | IT Security / Security Assessment |  | Authentication Services |  |  |  |  |  | | --- | --- | --- | --- | |  | Reporting / Report Development |  | End User Communications | |  | Application Development |  | Website / Marketing (Content) | |  | Data Integration (Imports & Exports) |  | Service Catalog Entries | |  | Cloud Services |  | End User Support | |  | Web Development |  | Other: <specify here> | |

| **KEY PROJECT STAKEHOLDERS** |
| --- |
| *List stakeholders in the table below. Stakeholders may include but are not limited to agencies, organizations, the public, and other individuals or entities actively involved in or affected by the project* |

| **PROJECT ROLE** | **NAMED RESOURCE** | **RESPONSIBILITIES** |
| --- | --- | --- |
| **Project Sponsor** |  | * Ultimate decision-maker * Provides project oversight and guidance. * Reviews/approves some project elements. * Approves Changes to Scope |
| **Project Sponsor POC / Project Manager** |  | * Manages project-level activities on behalf of Project Sponsor. * Provides business content and requirements. * Either provides guidance and direction to the project manager or acts in this role. * Interacts with ITS Reviewer. * Reviews and communicates changes to scope. |
| **ITS Reviewer / POC** |  | * Conducts initial customer outreach. * Determines any special needs of the customer. * Reviews requirements and offers input or creates material to enhance business content. * Handles problem resolution. * Communicates business request scope to PMO and ITS Teams. |
| **Vendor Project Manager** |  | * Liaises and coordinates field activities. * Evaluates current business practices for efficacy. * Reviews and documents current practices * Recommends business improvements. * Interprets business needs into “To-Be” business requirements. |
| **Quality Lead**  **(Matrix)** |  | * Evaluates business processes and practices from a quality perspective. * Develops Requirements Traceability Matrix, Test Plans and tests scripts, based on requirements. * Recommends business improvements to conform to best practices and policy adherence. * Tests product and reports test results against requirements |
| **Key User / Subject Matter Expert(s)** |  | * Provides design input. * Verifies requirements. * Performs User Acceptance test |

| **PROJECT BUDGET ESTIMATE** |
| --- |
| *Determining budget is the process of aggregating the estimated costs of accomplishing the above stated work products to establish an authorized cost baseline. This baseline includes all authorized expenses but excludes management reserves and contingencies. Project budget constitutes the funds authorized to execute the project. Project cost performance will be measured against the budget on a periodic basis and reported upon. Use the* ***Project Cost Estimation Tool*** *to assist with developing high level project estimates.* |

| **CATEGORY** | **OVERVIEW** | **CAPITAL EXPENSE**  **(one-time)** | **OPERATIONAL EXPENSE**  **(recurring)** |
| --- | --- | --- | --- |
| **Hardware** |  |  |  |
| **Software** |  |  |  |
| **Subscription / Licensing** |  |  |  |
| **Services /**  **Non-Mason Labor** |  |  |  |
| **Mason Labor** |  |  |  |
| <Other Costs> |  |  |  |
| <Other Costs> |  |  |  |

| **PROJECT ASSUMPTIONS** |
| --- |
| *Project assumptions are circumstances and events that are expected to occur during the project lifecycle for successful implementation and completion. This section specifies high-level factors that are, for planning purposes, considered to be true, but without any proof or demonstration. During the planning process, these assumptions will be validated. Any inaccurate, inconsistent, or incomplete project assumptions give rise to project risks, which may adversely affect project scope, timeline, and cost.* |

| **NUMBER** | **ASSUMPTION** |
| --- | --- |
| **1** |  |
| **2** |  |
| **3** |  |
| **4** |  |
| **5** |  |
| **6** |  |

| **PROJECT CONSTRAINTS** |
| --- |
| *Project constraints are restrictions or limitations under which a project must be implemented. Constraint categories include, but are not limited to scope, schedule, budget, quality, resource availability, and environment.* |

| **NUMBER** | **CONSTRAINT** |
| --- | --- |
| **1** |  |
| **2** |  |
| **3** |  |
| **4** |  |
| **5** |  |
| **6** |  |

| **PROJECT RISKS** |
| --- |
| *Project Risks are uncertain events or conditions that, if they occur, have a positive or negative effect on one or more project objectives (such as scope, schedule, cost, and quality). This section outlines the high-level risks identified based upon discussions with the sponsor, key stakeholders, and project team members. It is important to note that this initial risk assessment does not replace the full risk assessment conducted during the planning phase and documented within the project plan.* |

| **#** | **RISK DESCRIPTION** | **PROBABILITY** *(H/M/L)* | **IMPACT**  *(H/M/L)* | **PLANNED MITIGATION** |
| --- | --- | --- | --- | --- |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |
| **4** |  |  |  |  |

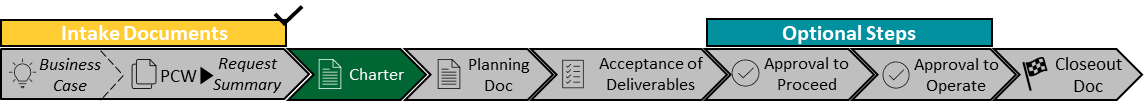
| **DEPENDENCIES** |
| --- |
| *There are constantly new projects emerging and numerous projects underway when a new effort begins. Project managers should maintain awareness of the project inventory and current priorities to identify other projects which may intersect with the scope/goals of this project. Multiple projects may have common data sources/targets, similar functionality or have other interdependencies that need to be considered in project prioritization and sequencing. List any projects that may have such a dependency on- or with this project in the table below. If there are none, enter ‘N/A’ under Description.* |

| **PROJECT ID** | **DESCRIPTION** |
| --- | --- |
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| **APPROVALS** |
| --- |
| *By all stakeholders agreeing to the scope, resource types, and deliverables required to successfully complete this project, the individuals listed approve the formal initiation of this project and grant authority to commit resources and direct/lead the project activities through planning, execution of delivery, monitoring and control, transition to operations, and project closure.* |

| **ROLE** | **NAME / TITLE** | **SIGNATURE** | **DATE** |
| --- | --- | --- | --- |
| **Sponsor:** |  |  | <MM/DD/YYYY> |
| **Sponsor POC:** |  |  | <MM/DD/YYYY> |
| **ITS Reviewer:** |  |  | <MM/DD/YYYY> |
| <Additional> |  |  | <MM/DD/YYYY> |
| <Additional> |  |  | <MM/DD/YYYY> |

Once all information has been collected, approval obtained, signatures have been acquired, and the kickoff meeting has occurred, submit this Project Charter document to the PMO. Email approvals are accepted in place of a signature but must be appended to the end of this document.



*Next: Planning Document*