

[Project Title]

Enterprise Project Charter

*[List Division Names]*

**[Date in Month and Year]**

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Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Modification** | **Author** |
| 1.0 |  | Created |  |
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|  |  |  |  |
|  |  |  |  |

1. Project Overview
	1. Project Overview

 [The Project Charter is defined by PMBOK as the document issued by the project initiator or sponsor that formally authorizes the existence of the project and provides the project manager with the authority to apply organizational resources to project activities]

* + 1. Background Information

[Provide key details about the circumstances, context, and background that has led to this project]

* + 1. Project Purpose or Justification

[What is the purpose / justification for the project]

* + 1. Project Objectives

[Provide the objectives that the project will accomplish]

* + 1. Critical Success Factors

[Provide the factors that will define the project a success. Describe what is necessary for the project to meet the stated objectives.]

1. Project Approach
	1. Project Methodology and/or Strategy

[Describe how the project will be implemented. What is the implementation strategy and approach, e.g. traditional waterfall or agile, phase implementation, etc.?]

* 1. Project Deliverables

[Describe and/or list the project deliverables]

* 1. Assumptions and Constraints

[What are the assumptions and constraints of this project? A project assumption is anything considered to be true but there is no guarantee. An assumption can be a factor needed in order for a project to be successful but may be outside the control of the project. A constraint is anything that may limit or regulate the project. Insert additional rows as needed.]

|  |  |
| --- | --- |
| **No** | **Assumptions**  |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5.  |  |
| 6. |  |

|  |  |
| --- | --- |
| **No** | **Constraints** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5.  |  |
| 6.  |  |

1. Project Scope
	1. Project Scope

[Provide the scope of the project, including product scope and the scope of work to deliver the product. List any items that are out of scope.]

|  |  |
| --- | --- |
| **No** | **Out of Scope Items** |
| 1. |  |
| 2. |  |
| 3. |  |

* 1. High-Level Requirements

[Describe or list the project requirements. Include an attachment, if needed.]

1. Project Schedule
	1. Project Schedule and Management

[What is the project schedule? Describe how the schedule will be managed and maintained? What tools will be used?]

* 1. Major Project Milestones

[What are the major milestones for this project? Examples include completion of project phases, such as project charter approval, planning, requirements, design, development, testing and integration, deployment, and closeout; completion of key deliverables; minimum viable product and release cycles, etc. Insert additional rows as needed]

|  |  |  |
| --- | --- | --- |
| **No** | **Project Milestone** | **Est Milestone Date**  |
| 1. | *Ex. Project charter approval* | *mm-dd-yy* |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
| 6. |  |  |

* 1. Project Dependencies

[Describe dependencies the project may have with a separate phase of the project and/or with a different project(s)]

1. Project Costs
	1. Project Costs

[What is the estimated cost to implement the project? Include a project budget worksheet. What is the basis of the estimate?]

* 1. Production / Maintenance Costs

[What are the estimated production / maintenance cost after go live?]

1. Project Resources
	1. Project Organization Chart

[Provide a project organizational chart that illustrates the authority and reporting relationship for this project. Include project resource names and roles. An example is shown below. ]

Stakeholder Committee

Division PMO

* 1. Roles and Responsibilities

[See sample project roles below. Edit as needed]

|  |  |
| --- | --- |
| **Project Roles** | **Responsibilities** |
| Executive Sponsor | The Executive Sponsor(s) is the executive owner(s) of the functional process(es) and allocates resources for the project. The main functions of the Executive Sponsor are the following:* Champion the project and ensure strategic alignment
* Allocate resources for the project
* Monitor the progress of the project
* Review and approve project phase completion
* Authorize and implement Division policy changes
* Make project decisions which are beyond the Steering Committee
* Resolve risks and issues
 |
| Project Steering Committee | The Project Steering Committee is composed of executives/managers from the various departments who have a significant functional stake(s) in the project. The Project Steering Committee should have sufficient authority to make project decisions in accordance with the sponsor’s vision and direction. The main functions of the Project Steering Committee are the following:* Make project decisions which are beyond the project management team but do not necessitate escalation to the Executive Sponsor(s)
* Clarify project objectives for the project team
* Recommend decision on project phase completion
* Monitor the progress of the project
* Resolve risks and issues
 |
| Stakeholder Committee (if needed) | A Stakeholder Committee should be established for cross-functional projects to provide for ongoing collaboration and communication between multiple departments. Representatives of this committee are managers who have in-depth knowledge and experience of the functional process(es).  The main functions of the Stakeholder Committee are the following:* Monitor and advise on business impacts to and from the project
* Provide feedback on business processes and upcoming changes
* Act as informal project change advocates, e.g. champion the project within their business units
 |
| Division PMO | The Division PMOs are responsible for the oversight and management of the Division’s program and project portfolio. The main functions of the Division PMO are the following:* Manage the Division program and project portfolio, including budget and resource allocation
* Provide technical expertise from project initiation to closeout
* Review enterprise project status reports and submit to the EPMO
* Ensure alignment of PM tools and templates with EPMO standards
* Monitor the progress of the project
* Resolve risks and issues
 |
| Project Manager | The project manager is responsible for the planning, executing, monitoring and controlling, and closing processes and activities of the project. The main functions of the Project Manager are the following: * Develop the detailed project scope, budget, and schedule
* Prepare project management plans and documents
* Implement the project within the triple constraint of scope, budget, schedule as well as quality
* Provide detailed project status reports to the Division PMO
* Complete project phase completion review forms
* Resolve risks and issues and escalate those beyond the scope of the project management team
 |
| Architect |  |
| Technical Lead |  |
| Security Lead |  |
| Functional Lead |  |
| Testing Lead |  |
| Change Management Lead |  |
| Business Analyst  |  |
| Subject Matter Expert |  |
| Developer |  |
| Tester |  |

1. Project Communications
	1. Project Team Communications

[Provide an overview of the communication methods within the project team organization, such as the types and frequency of communications and reports between the project team, stakeholders, steering committee, and sponsors. What tools will be used?]

* 1. Organization Change Management Approach

[Present OCM approach and methods, if available at time of project charter preparation]

1. Project Stakeholders
	1. Initial Stakeholder Register

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Division** | **Position** | **Role** |
|  |  |  |  |
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1. Project Benefits
	1. Initial Benefits Register

[List the benefits that will be realized as a result of implementing this project. Identify when the benefit will be realized, who is responsible for managing the benefit and how the benefit will be measured.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No | Benefit Description | When Benefit will be Realized | Who will Manage the Benefit | How will the Benefit be Measured |
| 1. | *Ex. Parent satisfaction will increase by 25% with increments of 5% with each quarter* | Ex. Quarterly after go live | Ex. Parent Branch | Ex. Online parent feedback surveys will measure pre and post satisfaction levels with system  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5.  |  |  |  |  |
| 6. |  |  |  |  |

1. Project Risks
	1. Risk Management Approach

[Present Risk Management approach and practices, if available at time of project charter preparation]

* 1. Initial Risk Register

[What are known and potential risks and issues of the project and the planned risk response? Consider risks in any of the following areas: project integration, scope, schedule, cost, quality, resource, communications, procurement, and stakeholder. Include positive risks (opportunities) and potential plans to enhance these opportunities.

Identify risks associated with project dependencies, timeline constraints, and cross-division efforts.

Insert additional rows as needed.]

|  |  |  |
| --- | --- | --- |
| **No** | **Risk Description** | **Planned Risk Response** |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5.  |  |  |
| 6.  |  |  |

1. Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Role** | **Name, Title** | **Signature** | **Date** |
| Project Manager |  |  |  |
| Executive Sponsor |  |  |  |
| Executive Sponsor |  |  |  |
| Executive Sponsor, CIO |  |  |  |
| Division PMO Director |  |  |  |
| Business Owner |  |  |  |
| Business Owner |  |  |  |
|  |  |  |  |
|  |  |  |  |