<Insert agency name / logo>

**Project Charter Template**

This template is furnished by WaTech to help agency project teams complete a project charter. Its purpose is to increase the quality and consistency of project charters. Project teams are encouraged, but not required, to use it.

Project teams are required to follow [PM-01-02-S IT Project Charter Standard](https://watech.wa.gov/policies/it-project-charter-standard).

* PM-01-02-S details the content requirements for the project charter.
* Agencies may reference other published documents within the charter to satisfy the requirements.

Please send feedback and questions to [WaTech Oversight Consultants](mailto:OCIOConsultants@watech.wa.gov).

A series of text boxes like this one are included in the template to give context for each section. They can be removed when submitting the charter.

<Insert Project Title>

Project Charter

Date:

Version Number:

##### 

Table of contents

[Revision history 3](#_Toc170737333)

[Charter approvals 4](#_Toc170737334)

[Project contact information 5](#_Toc170737335)

[Project information 5](#_Toc170737336)

[Points of contact 5](#_Toc170737337)

[Project overview 6](#_Toc170737338)

[Project description 6](#_Toc170737339)

[Business problem statement 6](#_Toc170737340)

[Scope 7](#_Toc170737341)

[Project team 7](#_Toc170737342)

[Organizational chart 7](#_Toc170737343)

[Roles and responsibilities 7](#_Toc170737344)

[Summary Schedule / Timeline 8](#_Toc170737345)

[Key deliverables [D] and milestones [M] 9](#_Toc170737346)

[Key performance indicators/metrics 10](#_Toc170737347)

[Budget 11](#_Toc170737348)

[Financial budget coding 11](#_Toc170737349)

[Maintenance and operations costs 11](#_Toc170737350)

[Major risks, assumptions, constraints, & dependencies 12](#_Toc170737351)

[Major risks 12](#_Toc170737352)

[Major assumptions 12](#_Toc170737353)

[Major constraints 13](#_Toc170737354)

[Major dependencies 13](#_Toc170737355)

[Exceptions to WaTech policies & technical standards 14](#_Toc170737356)

[Contact 14](#_Toc170737357)

[Appendix A – Acronyms and glossary 15](#_Toc170737358)

# Revision history

| Version | Date revised | Author | Revision summary |
| --- | --- | --- | --- |
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|  |  |  |  |

# Charter approvals

| Name of approver | Project role | Date approved |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Project contact information

**Project contact information**: Provide project contact information including:

* Agency name.
* Project name.
* Project manager’s name and email address.
* Executive sponsor’s name and email address.
* Business owner’s name and email address.
* WaTech oversight consultant's name and email address.

## Project information

|  |  |  |  |
| --- | --- | --- | --- |
| **Agency name** |  | **Project start date** | MM-DD-YYYY |
| **Project name** |  | **Project end date** | MM-DD-YYYY |

## Points of contact

| Project role | Name | Email address |
| --- | --- | --- |
| Executive sponsor |  |  |
| Business owner |  |  |
| Project manager |  |  |
| Technology owner |  |  |
| Oversight consultant |  |  |
|  |  |  |
|  |  |  |

# Project overview

## Project description

**Project description**: Provide a high-level project description.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

## Business problem statement

**Business problem statement**: Describe the specific problem the project is trying to solve or opportunity to be gained. If there are multiple problems or opportunities, describe the sequence in which the team intends to take them on.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

**Scope**: Briefly describe and define the boundaries for the project.

* In-scope: Identify the related business processes, organizational areas, policies, systems, and technical infrastructure that are inside the scope of project efforts.
* If applicable, include a description of the proposed solution and why it was selected, and how it addresses the business problem.
  + Consider: 1) business processes that will change; 2) organizational areas that will be affected; 3) policies that will be impacted; 4) systems that will be implemented, enhanced, replaced, or retired; 5) technical infrastructure that will be implemented, upgraded, replaced, or retired; and 6) high level business requirements.
  + Identify whether the project will be independently developed or use a commercial off the shelf (COTS) solution, a software as a service (SaaS) solution, or some combination of products.
  + If the project is proposing to build the solution rather than buying a COTS or SaaS solution, provide reference information about the alternatives explored and why this option was selected.
  + Provide reference details of the technical scope of the solution if known. If the project has not yet made this decision, add a reference to how that determination will be made and the expected decision date.
* Out-of-scope: Identify the related business processes, organizational areas, policies, systems, and technical infrastructure that are outside the scope of project efforts.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

## Scope

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

# Project team

## Organizational chart

**Organizational chart**: Provide an organizational chart of the project team that identifies team members and that shows the project is adequately staffed by state personnel in key functions.

* Key functions will be designated by the executive sponsor and in consultation with the State CIO or their designee.
* Identify positions that are key, open, and staffed by contractors.



## Roles and responsibilities

**Roles and responsibilities**: Describe the roles and responsibilities for each key project team member included in the organizational chart.

Table

Description automatically generated

A RACI chart is an example of how to describe roles and responsibilities.

* **R**esponsible – A person who does the work.
* **A**ccountable – The decision maker. Only one person should be listed as accountable per activity.
* **C**onsulted – A person involved prior to a decision.
* **I**nformed – A person advised after a decision.

# Summary Schedule / Timeline

**Schedule / Timeline**: Include a schedule covering key activities, major milestones, and major deliverables at each stage of the project for the life of the project.

For the project charter, the schedule / timeline should be a summary level. A more detailed schedule will be developed later.

The schedule should include target completion dates for major milestones and deliverables.





# Key deliverables [D] and milestones [M]

**Key deliverables and milestones**: Provide a list of major deliverables and milestones.

The goal of any project is to achieve something and deliver on it, often in the form of a good, a service or a combination of the two. A deliverable serves as proof that the progress is being made.

Deliverables are often contractually obligated requirements, detailed in agreements. The agreement articulates the description of a deliverable, as well as the delivery timeline and payment terms. Based on the contract type, deliverables may provide a mechanism by which the vendor gets paid.

Deliverables are often linked to a milestone, and therefore, sometimes get conflated.

* Deliverables are a product or service.
* Milestones are (usually significant) events that takes place.
* When listing deliverables and milestones, distinguish them by marking them with a [D] or [M] respectively.

Examples:

* Product deliverables – Delivered software, configured hardware, feasibility report.
* Project deliverables – Project charter, tech budget, project management plan.
* Milestones – Funding approval, kick-off meeting, gate certification, sprint.
* Work products – Draft versions of deliverables [do not include in table below].
* Paperwork – Signed contract, status reports, kanban board [do not include in table below].

For projects where deliverables and milestones repeat in multiple iterations (e.g., the sprint backlog for a project managed using scrum), the charter’s implementation schedule does not need to list all instances of those deliverables and milestones. In these cases:

* The list of should include one line for each distinct deliverable and milestone. That is, the deliverable or milestone title (e.g., user cases) that will recur in each iteration.
* The summary description should describe:
  + That the deliverable or milestone is recurring.
  + The standard iteration timeline (e.g., two-week sprint cycle).
* The target completion date should list two dates—the first and final completion target dates for that recurring item.

| Deliverable/ Milestone | Summary description | Target completion date |
| --- | --- | --- |
| Deliverable [D] |  | <MM/DD/YYYY> |
| Milestone [M] |  |  |
|  |  |  |

# Key performance indicators/metrics

**Key performance indicators/metrics**: Identify and define two types of key performance indicators (KPIs)/metrics for the project:

* Project **delivery** KPIs/metrics – Demonstrate the project is on-time, within budget, and making progress (e.g., delivered working software and other products or services).
* Project **strategy** KPIs/metrics – Demonstrate the project is achieving its strategic goals and objectives (e.g., improved customer service, increased regulatory compliance, increased accessibility, more secure, more reliable).

Metrics should include the following definitional elements:

* Metric – Short title for the metric.
* Formula – How the metric is calculated.
* Data source - Where the data for the metric comes from (e.g., database).
* Unit of measure – For example, percent, dollars, ratio.
* Collection and reporting frequency - How often the metric data is collected and reported (e.g., daily, monthly, quarterly).
* Baseline – The current level of performance.
* Target – The desired level of performance.
* Threshold – The level of performance considered acceptable.
* Owner - Person responsible for collecting and reporting the metric.
* Authorized by – Person with the authority to approve the collection and reporting of the metric.

| Metric | Formula | Data source | Unit of measure | Frequency | Baseline | Target | Threshold | Owner | Authorized by |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
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# Budget

**Budget**: Describe how the project will be funded through all phases and any associated funding risks, limitations, or constraints. If the project has secured only partial funding, describe the approach to secure the entire funding for the project costs through implementation and five years of maintenance, or otherwise address the risk.

Include references to budget, page, and line numbers or include proviso description. If funding was not provided through session law, include funding description as available.

The latest budget can be found in the latest approved technology budgeted posted to the Washington IT Dashboard.

## Financial budget coding

**Financial budget coding**: Include discrete financial coding (e.g., AFRS codes) for the project.

## Maintenance and operations costs

**Maintenance and operations costs**: Include ongoing maintenance and operation costs of the project post implementation and close out delineated by agency staffing, contracted staffing, and service level agreements. Include costs for M&O. If there are no M&O costs, a sentence or two should be added to note why they are not applicable.

# Major risks, assumptions, constraints, & dependencies

## Major risks

**Major risks**: Summarize the known major risks associated with the project. Risks are defined as any event which may adversely impact project outcomes. Risks may be strategic, environmental, financial, operational, technical, or process related.

Identify on a scale of 1 to 4 the probability and the impact of the risk occurring. Summarize the planned risk response should the risk occur. A more formal risk assessment and risk management plan may be necessary depending on the number and severity of the risks.

The following table identifies the known risks associated with the project:

* Status (open, closed, accepted).
* Probability (rated on a scale of 1 [very unlikely] to 4 [very likely]).
* Impact (rated on a scale of 1 [insignificant disruption] to 4 [major disruption]).
* Preliminary risk response strategies.
* Owner.
* Due date to resolve the risk.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Title | Description | Status | Probability | Impact | Response | Owner | Due date |
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## Major assumptions

**Assumptions**: Summarize the major and high-level assumptions.

* A project team must make certain assumptions to proceed with any project as there are always factors beyond one’s control.
* A project assumption is what’s believed true in a project.
* This can be an event or circumstances that are likely to occur over the course of the project’s life cycle.
* They are stated without proof or evidence.
* Assumptions documented elsewhere in the project charter do not need to be repeated here.

The assumptions believed to be true for the project are:

* Assumption text here.
* Assumption text here.

## Major constraints

**Constraints**: Summarize the major and high-level constraints.

* A project constraint is a limitation to the project. This can be anything from the budget to the schedule and resources that’ll be needed to execute the project.
* Assumptions vs. constraints.
  + Assumptions are believed to be true.
  + While constraints are true.
  + Assumptions tend to be good for the project while constraints are not.
* Business and technical constraints.
  + Business constraints are high-level issues that depend on your organization. It’s rare for these constraints to change.
  + Technical constraints are those that limit design choices. They’re fixed and changes to them will impact the project plan.
* Project management constraints. PMBOK lists six types: Scope, schedule, budget, quality, risks, resources.
* Constraints documented elsewhere in the project charter (e.g., budget info) do not need to be repeated here.

The major constraints for the project are:

* Constraint text here.
* Constraint text here.

## Major dependencies

**Dependencies**: Summarize the major and high-level dependencies.

* Dependencies signify a relationship between activities.
* A dependency can be represented by a directional relationship [predecessor 🡆 successor].
* Dependencies documented elsewhere in the project charter (e.g., schedule predecessors) do not need to be repeated here.

The major dependencies for the project are:

* Dependency text here.
* Dependency text here.

# Exceptions to WaTech policies & technical standards

**Exceptions to policy and standards**: Document any proposed exceptions to [WaTech policies and technical standards](https://watech.wa.gov/policies?page=0). If no exceptions are proposed, affirm that.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

Sample body text here. Sample body text here. Sample body text here. Sample body text here.

# Contact

Questions regarding the charter can be directed to:

# Appendix A – Acronyms and glossary

|  |  |
| --- | --- |
| Term | Definition |
|  |  |
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