

Project Charter

* INDICATES PROJECT FIELDS ARE REQUIRED FOR ALL PROJECT TYPES (E.G. ULTRALITE, LITE, STANDARD/COMPLEX)

*Project Name:	Project Number:	Prepared by: (Project Manager)	*Date: (YYYY/MM/DD)
*Sponsor:	*Business Unit:	*Project Type: <input type="checkbox"/> Ultralite <input type="checkbox"/> Lite <input type="checkbox"/> Standard <input type="checkbox"/> Complex	

Summary of your Commitment	<p>The Project Charter is the document of record used to gain initial agreement and start the planning process by describing the project in detail and is used as input into the project plan.</p> <p>When you sign this document, you become a “sponsor” by virtue of your commitment of time, money, and people to the project. The people who work on the project are “team members” and commit themselves to produce certain work products, or deliverables.</p> <p>By signing this document, you agree to proceed with the project and donate your time, money, people, and continued support as long as the parameters of the project do not substantially change. Project may encounter change affecting budget, scope, schedule or need for the project.</p>
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*Project Goals	<i>Why is the project being undertaken? Describe an opportunity or problem that the project is to address.</i>

Objective(s) and Value	<i>State the purpose of the project and how it relates to strategic, foundational, tactical, and operational goals (Cloud first, 2020, improve services, teaching, learning, research)</i>
<ul style="list-style-type: none"> • Align with UC Merced’s Cloud First Strategy • Cost Reduction & Risk Avoidance • Gain Efficiencies • Improved User Experience 	

*Preliminary Scope Statement	<i>Describe the result of this Project; this should include information about the project and the characteristics of the product, service, or process for creation. Optionally, list a brief summary of what will not be in scope. A more detailed project scope statement, which describes, in detail, the project’s deliverables, work required, and scope exclusions will be created in the project’s Planning Phase.</i>
<ul style="list-style-type: none"> • Description • In Scope • Out of Scope 	

*Assumptions	<i>Assumptions are assumed to be true and are not within the control of the project team. An assumption can be considered an expectation of skills, system connectivity or stability of an existing environment. Describe details about what is not included in the project, dependency, budgetary agreements, or external factors.</i>
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*Constraints	<i>Constraints are known to be true and cannot be changed. They may include budget figures, hardware or software environments, deadlines, staff involvement, etc.</i>

Key Resources	<i>What must this project have in place in order to be successful? (Hardware or software environments, knowledge/skills of team members, stakeholder support, etc.)</i>

*High Level Project Milestones	<i>Identify high level milestones and their estimated duration</i>
Description	Duration Estimates
Initiation	
Planning	
Execution	
Close	
Desired Go-live Date	Date: Justification:

Risk Assessment	<i>This is a preliminary risk assessment and looks at the risk events and the impact of a probable event. A more extensive Risk Assessment will be conducted in the Planning phase.</i>		
Risk Areas	Risk Event	Yes/No	Describe Impact
External Dependencies	<i>Is the project dependent on other projects?</i>		
Domain Knowledge	<i>Does the organization have subject matter experts available for the project?</i>		
Operational Change	<i>Is this a significant change in operational processes or training required?</i>		
Organization Impact	<i>Is there a critical organizational impact by not doing the project?</i>		
Complexity	<i>Are there complex systems integrations or data migrations involved in this project?</i>		
Vendor Partnership	<i>Is the vendor pre-approved to work with UCM or UC?</i>		
Other			

Cost and Funding (Operational and Capital)						
<i>Reference the project budget for further details.</i>						
	Onetime Charge	Current Year	Year 2	Year 3	Total	Funding FAU#

Internal Staff Labor (Calculate internal staff labor at \$42.00/hour)						
External Staffing Costs						
Software Licensing & Support						
Software Tools						
Hardware						
Travel & Expense						
Training						
Contingency (Risk)						
Total:						

*Project Stakeholders		
Business Unit	Anticipated Role & Responsibility	Funcational Manager/ Approving Authority
	Sponsor, Final Approver	
	Change Approver	
	Subject Matter Expert	
	Business Analyst	
	CORE Team	
	User Acceptance Tester (UAT)	
	Developer	
	Architect Reviewer	
	Security Reviewer	
	Test Script Developer	
	DBA	
	Networking Engineer	
	Systems Administrator	
	Trainer	
	IT Service Manager	
	Documentation Lead	
	Procurement Lead	

By approving the Project Charter, you are in agreement with the preliminary duration, the scope, the anticipated costs, and the project resources as described herein.

*Sponsors/Additional Stakeholders	Name	Signature	Date
Executive Sponsor			
Project Sponsor			
Chief Information Officer (CIO)	Ann Kovalchick		
Deputy Chief Information Officer (DCIO)	Nick Dugan		
Project Director, OIT	Kent Carpenter		
Communications Officer	Christy Snyder		
Finance Officer	Ronnie Vasquez		
Procurement	Meagan Torres		
Project Manager / Coordinator			