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|  | | |
| **Project Charter Template** | | |
|
|  | | |
| **Project Name here** | | |

**Date (Month, Year)**

# 

Project Title here

1. [High Level Business Objectives](#_sphc5ektq17c)
2. [Project Owners and Sponsors](#_qtspku6l6vl)

##### Stony Brook University Departments Benefiting from the Project

1. [Project Milestones & Schedule](#_bph84c5bmi2a)
2. [Project Cost Estimate/ Budget](#_y8qxcljcyaht)
3. [Assumptions](#_6tr0fl6h5ylc)
4. [Project Risks](#_pv82df7s74j)
5. [Project Communication Plan](#_723emsurgc2l)
6. [Change Control](#_g25co98smu9a)
7. [Leadership Authorization](#_bq3025pxguwb)

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| --- |
| Project title here |

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| **Prepared By:** |  |
| **Date:** |  |

|  |  |
| --- | --- |
| **Project Manager:** |  |

**Executive Summary**

*[An executive summary, or management summary, is a short section of this document, produced for business purposes, that summarizes the longer proposal in such a way that readers can rapidly become acquainted with a large body of material without having to read it all.]*

Provide Executive summary here

Benefits of the Project include:

* List the benefits here

##### High Level Business Objectives

*[A business objective is a result that the Organization aims to achieve. It includes the strategies that will be used to get there. A business objective usually includes a time frame and lists the resources available. Having a comprehensive list of business objectives creates the guidelines that become the foundation for your business planning. Some examples include; Getting and Staying Profitable, Productivity of People and Resources, Excellent Customer Service, Student Attraction and Retention, Employee Attraction and Retention, Mission-driven Core Values, Sustainable Growth. Outline any tasks, requests and other projects that will not be in the scope of this project.]*

Provide High Level Business Objectives here

##### 

##### 

##### Project Owners and Sponsors

|  |  |
| --- | --- |
| **Project Owner(s):** | *[Include full name and role of individual(s)]* |
| **Project Sponsor(s):** | *[Include full name and role of individual(s)]* |

##### Stony Brook University Departments Benefiting from the Project (Indicate if the Department will also be on the Project Steering Committee)

|  |  |  |
| --- | --- | --- |
| **Department** | **Contact name** | **PSC Member** |
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##### Project Milestones & Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Milestone** | **Milestone Description** | **Estimated Completion Date** |
| 1 | Initiation | Project Charter, Kickoff Meeting |  |
| 2 | Procurement | Product Evaluation Team Selection, Business Requirements, Business Requirements Gathering, RFP Development, Initial Project Planning, RFP Evaluation, Demo Vendor Solutions, Evaluate & Select Solution Finalist, Vendor Contract Negotiations |  |
| 3 | Planning | Communication Plan, Functional Requirements,Scope finalized and Approved, Project Plan |  |
| 4 | Execution | Acquire & Setup Software, Servers, Infrastructure.  System & Application Testing, Technical & User System Training, Integration Creation |  |
| 5 | Implementation/ Migration | Department by Department  Migration & User Acceptance Testing |  |
| 6 | Closure | Conduct Lessons Learned,  Update Documentation, Close Project |  |

##### 

##### Project Cost Estimate/ Budget

**Annual Maintenance Costs of Existing Software (if applicable) and new Solution**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Qty** | **Current Costs** |  | **New Qty** | **New Costs\*** |
| **Annual Infrastructure H/W, S/W** |  |  |  |  |  |
| **FTE (Application Support)** |  |  |  |  |  |
| **FTE (Staff - Systems)** |  |  |  |  |  |
| **Professional Development** |  |  |  |  |  |
| **Maintenance** |  |  |  |  |  |
| **Total Annual Maintenance** |  |  |  |  |  |

*\*Estimates only, as a Vendor is not selected. Subject to change.*

**Initial Startup Costs of Solution**

|  |  |  |
| --- | --- | --- |
|  | **New ECM Rate\*** | ***New ECM Startup Costs*** |
| **Initial Software License, Maintenance & Acquisition Cost** |  |  |
| **Integration / Consulting/ Professional Services** |  |  |
| **Vendor Training** |  |  |
| **Hardware (if required)** |  |  |
| **Total Startup $** |  |  |

*\*Estimates only, as a Vendor is not selected. Subject to change.*

##### Assumptions

*[Project Assumptions are events or circumstances that are expected to occur during the project life-cycle.]*

Major assumptions include:

* Add Project Assumptions here

##### Project Risks

Project risk mitigation planning will seek to minimize and avoid potential risks as necessary. Project Risks associated with the Project are identified as follows:

* *[List out all identified Risks. The following are the types of risks commonly encountered by projects; Scope Creep, Budget Risk, Resistance To Change, Integration Risk, Resource Risk, Contract Risk, Disputes, Sponsor Support.]*

##### Project Communication Plan

The Project Manager in conjunction with the Project team will work to produce the following communications, reports and document library:

* The creation of a detailed Project Plan, including a Work Breakdown Structure (WBS), which shall be submitted to the Project Steering Committee for approval. The WBS shall include tasks broken down to their smallest logical and measurable degree, each with a start date, duration, assigned team member(s) and any predecessor tasks.
* A monthly status report which includes:
  + Change requests (discussed below)
  + Detailed update of activities performed
  + Detailed update of tasks, milestones, schedule and percentage complete compared to those baselined in the Project Plan, discussed above
  + Discussion of anticipated risks and mitigation plans for those risks
  + Accounting of project costs expended

* A monthly status update report from the Vendor to the PMO, due on the last business day of each month. The status update should feature a summary of the above points.
* A project document library is to be established in Google Drive, with access provided to team members (as appropriate), PMO members and Sponsors. All project related documents, including the above referenced reports and presentations, shall be shared.

##### Change Control

All proposed project changes for any changes that could affect project scope, deliverables, accepted schedule baseline, costs, resources or quality will be made through a formal change control process.

All change requests will be logged, evaluated, reviewed, approved, modified or rejected by a Change Control Board, comprised of the project sponsors, and the program manager. The sponsors will set a minimum dollar amount that will trigger a change request.

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| --- | --- | --- | --- |
| Revisions | | | |
| *Date* | *Version* | *Approved By* | *Comments* |
|  |  |  |  |
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##### Leadership Authorization

**Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Project Role** | **Signature** |
|  |  | **Project Sponsor** |  |
|  |  | **Project Sponsor** |  |
|  |  | **Project Stakeholder** |  |
|  |  | **Project Stakeholder** |  |
|  |  | **Project Stakeholder** |  |
|  |  | **Program Manager** |  |
|  |  | **Project Manager** |  |