Planning, Analysis, & Change



*Project Management Office (PMO)*

Project Charter

|  |
| --- |
| Project Charter - Lite*This Project Charter includes all necessary information to document the expectations of a project and the requirements needed to meet those expectations. It serves as a foundational reference and guide throughout the Execution phase..* |

| **Project name:** | **<Project name>** |
| --- | --- |

|  |  |
| --- | --- |
| **Executive Sponsor** |  |
| **Project Sponsor** |  |
| **Project Manager** |  |
| **Business Analyst** |  |
| **Change Manager** |  |

**CU Denver Strategic Plan**

*Describe how the outcomes of this project will support the university strategic plans, such as referencing CU Denver University’s* [*Strategic Plan*](https://www.ucdenver.edu/2030/goals-for-2030)*. Please check all related CU Denver strategic plan objectives pertaining to this project.*

[ ]  CU Denver will be the equity-serving institution in the nation

[ ]  Become known as a university for life

[ ]  Be internationally known for its research and creative work

[ ]  Serve as the anchor institution for an open innovation district in downtown Denver

[ ]  Be known as a people-centered "Best Place to Work"

[ ]  Operationally Aligned

Table of Contents

[1. Project Overview 3](#_Toc179976361)

[1.1 Project Description 3](#_Toc179976362)

[1.2 Key Deliverables 3](#_Toc179976363)

[2. Project details 3](#_Toc179976364)

[2.1 Project Management Methodology 3](#_Toc179976365)

[2.2 Project Schedule 3](#_Toc179976366)

[2.3 Project Scope 4](#_Toc179976367)

[2.4 Out of Scope 4](#_Toc179976368)

[2.5 Project Size Estimate 4](#_Toc179976369)

[2.6 Project Team Resources 5](#_Toc179976370)

[3. Project Variables 5](#_Toc179976371)

[3.1 Risks of Implementing Project 5](#_Toc179976372)

[3.2 Assumptions 5](#_Toc179976373)

[4. Document History 6](#_Toc179976374)

[5. Approval and Authority to Proceed 6](#_Toc179976375)

[6. Appendix 6](#_Toc179976376)

[6.1 Glossary: Definition of Terms 6](#_Toc179976377)

# Project Charter

## Project Overview

* 1. Project Description

| *Provide a concise overview of the project’s main goal, the issues it addresses, and the key outcomes it aims to deliver.* |
| --- |
|  |

* 1. Key Deliverables

| *This section details the primary deliverables, including products, services, or results, that the project will generate.* |
| --- |
|  |
|  |
|  |

## Project details

* 1. Project Management Methodology

| *Planning will be conducted using standard project management processes [e.g., waterfall, agile, or hybrid] including OIT team planning meetings for work breakdown, task estimation, risk assessment, and scheduling. Planning estimates will be based on previous experience of OIT staff SMEs.* |
| --- |
| Methodology | Choose an item. |

* 1. Project Schedule

| *What are the timelines for this project?* |
| --- |
| Proposed start date: |  |
| Proposed end date: |  |
| Planning & design dates: |  |
| Execution phase dates: |  |
| Testing & completion |  |
| Known deadlines: |  |

* 1. Project Scope

| *The following is a description of the scope (work) that will be performed within the project.* |
| --- |
|  |
|  |
|  |
|  |

* 1. Out of Scope

|  |
| --- |
| *This section outlines the tasks and activities that are explicitly excluded from the project’s scope.* |
|  |
|  |
|  |
|  |

* 1. Project Size Estimate

| *Select all applicable characteristics and then determine the overall project size accordingly.* |
| --- |
| Size | Hours | Complexity | Duration | Cost |
| S | < 200 hours | Simple | < 1 month | Less than $25K |
| M | 200-400 hours | Moderate | 1-3 months | $25K to $250K |
| L | 400 - 1000 hours | Complex | 3-12 months | $250K to $500K |
| XL | > 1000 hours | Very Complex | 1+ years | $500K + |

| *Select all applicable characteristics and then determine the overall project size accordingly.* |
| --- |
| Project Size | Reason  |
| Choose an item. |  |

* 1. Project Team Resources

|  |
| --- |
| *Key team resources include sponsors, project managers, project team members, external stakeholders, and vendors.* |
| Role | Resource | Department  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Project Variables

* 1. Risks of Implementing Project

| *The following risks could potentially hinder the successful completion of the project.* |
| --- |
|  |
|  |
|  |

* 1. Assumptions

|  |
| --- |
| *The following assumptions pertain to business, technology, resources, scope, expectations, and schedules that contribute to or support this project.* |
| * + 1. Adequate personnel resources will be made available to ensure successful planning and implementation
 |
| * + 1. Adequate resources will be made available post implementation to ensure optimum system maintenance and optimum performance upon transition to operations
 |
| * + 1. Budget has been approved and is available, if needed
 |
| * + 1. Project team members have all the required skills
 |
| * + 1. Decisions will be made in a timely manner
 |
| * + 1. Executive leadership support
 |
| * + 1. Timely access to stakeholders
 |

## Document History

|  |
| --- |
| *Record the changes and updates made to the document, including dates, descriptions of changes, and the names of individuals who made the updates.* |
| **Version** | **Date** | **Author** | **Comments** |
|  |  |  |  |
|  |  |  |  |

## Approval and Authority to Proceed

|  |  |
| --- | --- |
| *We approve the proposal and authorize the team to proceed.* |  |
| ***Role*** | ***Name*** | ***Title*** | ***Date*** |
| Executive Sponsor |  |  |  |
| Project Sponsor |  |  |  |

## Appendix

* 1. Glossary: Definition of Terms

|  |  |
| --- | --- |
| **Term / Acronym** | **Definition** |
| **Approval and Authority to Proceed** | Authorization for the project team to proceed with the project. |
| **Assumptions** | Conditions assumed to be true for the purpose of planning the project. |
| **Baseline** | The approved version of a project plan that can be used to measure progress. |
| **Business Analyst** | The individual who analyzes and documents the business needs and requirements. |
| **Change Management** | The process of managing changes to the project scope, schedule, or resources. |
| **Change Manager** | The person responsible for managing changes to the project. |
| **Communication Plan** | A document outlining how project information will be communicated to stakeholders. |
| **Constraints** | Limitations or restrictions that affect the project’s execution. |
| **Critical Path** | The sequence of tasks that determines the minimum project duration. |
| **CU Denver Strategic Plan** | The strategic objectives of CU Denver that the project aims to support. |
| **Deliverables** | Specific outputs or products that the project is expected to produce. |
| **Dependencies** | External projects, resources, and business processes/cycles the project depends on. |
| **Document History** | Record of changes and updates made to the document. |
| **Executive Sponsor** | The senior executive responsible for the project. |
| **In Scope** | The tasks and activities included within the project’s scope. |
| **Key Deliverables** | The primary products, services, or results the project will generate. |
| **Milestones** | Significant points or events in the project timeline. |
| **Non-University Services** | External services impacted during or after project execution. |
| **Out of Scope** | Elements that are not included in the project’s scope. |
| **Project Background Information** | Context and history related to the project. |
| **Project Benefits** | The advantages the project will bring upon successful execution. |
| **Project Charter** | A document outlining the necessary information to document project expectations and requirements. |
| **Project Description** | A concise overview of the project’s main goal, issues addressed, and key outcomes. |
| **Project Details** | Comprehensive information about the project’s methodology, schedule, and scope. |
| **Project Management Methodology** | The processes and practices used to plan and execute the project (e.g., waterfall, agile). |
| **Project Manager** | The person responsible for planning, executing, and closing the project. |
| **Project Milestones** | Key phases and milestones within the project’s timeline. |
| **Project Name** | The title or name of the project. |
| **Project Schedule** | The timelines and key milestones for the project. |
| **Project Scope** | The boundaries of the project, including what is included and excluded. |
| **Project Size Estimate** | An estimate of the project’s size based on hours, complexity, duration, and cost. |
| **Project Sponsor** | The individual or group that provides resources and support for the project. |
| **Project Success Criteria** | Factors critical to the project’s success and how they will be measured. |
| **Project Team Resources** | Key team members and their roles within the project. |
| **Project Variables** | Factors that can affect the project’s outcome, such as risks and assumptions. |
| **Quality Assurance** | Processes to ensure that the project will meet the defined quality standards. |
| **Resource Allocation** | The process of assigning resources to project tasks. |
| **Risks of Implementing Project** | Potential risks that could hinder the successful completion of the project. |
| **Risks of Not Implementing Project** | Risks associated with not implementing the project. |
| **Stakeholders** | Individuals or groups with an interest in the project’s outcome. |
| **University Services** | Services impacted during or after project execution, including technical, academic, and administrative services. |
| **Work Breakdown Structure (WBS)** | A hierarchical decomposition of the total scope of work to accomplish the project objectives. |