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| Stanford University  <Org Name>  Funding Project Charter  <Project Name> |

<The purpose of this template is to provide detailed information about the project for funding purposes.>

**DOCUMENT VERSION X**

**<Date>**

**Project Area:** Choose an item.

Authors

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DOCUMENT HISTORY

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| --- | --- | --- | --- |
| Date | Document Version | Document Revision Description | Document Author |
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APPROVALS

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| --- | --- | --- | --- |
| Approval Date | Approved Version | Approver Role | Approver |
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TABLE OF CONTENTS

[1. Background 1](#_Toc487705375)

[1.1. Current Situation 1](#_Toc487705376)

[1.2. Problem Statement 1](#_Toc487705377)

[1.3. Impact to Business and/or Stanford Community 1](#_Toc487705378)

[1.4. Key Performance Indicators 1](#_Toc487705379)

[1.5. Effects of Not Doing Project 1](#_Toc487705380)

[2. Approach 1](#_Toc487705381)

[2.1. Solution Overview 1](#_Toc487705382)

[2.2. In-Scope 2](#_Toc487705383)

[2.3. Impacts on / Touch Points with Other Systems 2](#_Toc487705384)

[2.4. Out-of-Scope 2](#_Toc487705385)

[2.5. Deliverables 2](#_Toc487705386)

[2.6. Timeline 2](#_Toc487705387)

[2.7. Project Team Organization 3](#_Toc487705388)

[2.8. Roles & Responsibilities 3](#_Toc487705389)

[2.9. Project Risks 3](#_Toc487705390)

[3. Financials 4](#_Toc487705391)

[3.1. Estimated Project Costs 4](#_Toc487705392)

[3.2. Estimated Ongoing Support Costs 4](#_Toc487705393)

[3.3. Estimated Funding Source 5](#_Toc487705394)

[3.4. Contingencies 5](#_Toc487705395)

[4. Appendix 5](#_Toc487705396)

[4.1. 1st Section of Appendix <if needed> 5](#_Toc487705397)

1. Background
   1. Current Situation

< This section defines the current state of a business process, system or both. It provides background and context in support of the next section, the Problem Statement. What are the pain points and drivers for action? Identify compliance, security or other risks that must be mitigated.>

* 1. Problem Statement

<This section defines the problem that the project charter attempts to solve. Include any of the following as appropriate.

* purpose of project
* who benefits from the investment
* why this is a priority for consideration, include connections to strategic or technology directions and/or roadmap
* which service (or services) this project would support
* how the project contributes to increase strategic value and/or increase market penetration>
  1. Impact to Business and/or Stanford Community

<This section should address the improved operations, efficiencies, cost savings and/or changes that will result from the proposed project. This section will help to alert Central Businesses and Distributed Users as to the extent and kinds of changes that will take place and should foster an understanding of upcoming change management necessary. Please be as specific as possible with respect to identification of the impacted user groups and the timing and nature of the change to their processes.>

* 1. Key Performance Indicators

<List one or more KPI’s that allow the University to measure the operational efficiency, improved accuracy and/or effectiveness because of this project. An example is, “Decrease Average Turnaround Time per Invoice from 30 days to two weeks by EOY 2010.” The KPI is ‘Decrease Turnaround Time Per Invoice.'

If KPI’s cannot be defined then a list of success factors and/or benefits should be described in this section.>

* 1. Effects of Not Doing Project

<This section should call out the impact of not completing the project

* Use clear, business centric language to articulate the effect
* Next effect>

1. Approach
   1. Solution Overview

<This section should communicate the high-level solution as proposed by this project charter. Further sections of this project will provide more detail.>

* 1. In-Scope

<This section should clearly define the scope of the solution. A bulleted list with a brief description would be helpful.>

* 1. Impacts on / Touch Points with Other Systems

<This section should identify the integrations with other systems inside and outside of AS / ITS. Be sure to address impacts on upstream and/or downstream systems, identify whether an integration needs to be built or whether the impacted system is indirectly impacted. This section is import to complete as it may also affect other staff resources who may not be called out explicitly on the project.>

* 1. Out-of-Scope

<This section should clearly define what is outside the scope of the solution. A bulleted list with a brief description would be helpful. Description should answer why an item is not considered in-scope.>

* 1. Deliverables

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Project Phase** | **Deliverable** | **Completion Date** | **Contingency Date** | **Approver** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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* 1. Timeline

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Jan** | | **Feb** | | **Mar** | | **Apr** | | **May** | | **Jun** | | **Jul** | | **Aug** | | **Sep** | | **Oct** | | **Nov** | | **Dec** | |
| Planning |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Requirements |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Design |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Development |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| QA Test |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| UAT Test |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Rollout |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

<This section should provide a rationale or reason for the timeline such as meeting compliance deadlines, award deadlines, staff availability, budget constraints, etc. This section should also include dates (and events) when delivery cannot be completed, such as year-end, commencement, etc.>

* 1. Project Team Organization

< Use the Word Org Chart wizard (On the Insert tab, in the Illustrations group, click SmartArt. In the Choose a SmartArt Graphic gallery, click Hierarchy, click an organization chart layout such as Organization Chart) or create an org chart in Visio and embed here (from Insert > Object menu)>

Daisy Smith

Project Sponsor

John Smith

Project Manager

Jane Smith Business Lead

Mary Smith Technical Lead

Doug Smith

QA Lead

Al Smith

Business Analyst 1

Sally Smith

Business Analyst 2

Hank Smith

Developer 1

Mike Smith

Developer 2

Lisa Smith

QA Specialist 1

Amy Smith

QA Specialist 1

* 1. Roles & Responsibilities

<A sample set of roles and general responsibilities is available from the following Confluence page: <https://asconfluence.stanford.edu/confluence/display/ASPMO/Sample+RACI+Diagram>>

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | General Responsibilities | Estimated Time Commitment |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

* 1. Project Risks

<Identify the assumptions that have a bearing on the project charter and that influenced your decisions in this document. Also include project risks and identify mitigation factors.>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Risk | Likelihood | Severity | Mitigation Plan |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. Financials
   1. Estimated Project Costs

|  |  |  |  |
| --- | --- | --- | --- |
| Cost | Funded Amount | Operating Budget / Internal Impact | Rationale for Estimate |
| **Contract** Staffing: |  |  |  |
| Administrative Systems |  |  |  |
| Business Office |  |  |  |
| Vendor |  |  |  |
| Other Consulting Firms |  |  |  |
| **Internal** Staffing (estimated) |  |  |  |
| Onshore |  |  |  |
| Offshore including onshore support |  |  |  |
| Business Office |  |  |  |
| Vendor |  |  |  |
| Hardware |  |  |  |
| Software |  |  |  |
| ITS Charges |  |  |  |
| Budget Contingency (XX%)  (see section 3.4 for details) |  |  | < Normal (10%) >  < Medium –  High Risk (15%) > |
| **Totals** |  |  |  |

* 1. Estimated Ongoing Support Costs

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Cost | FYxx | FYxx | FYxx | Totals |
| Staffing: |  |  |  |  |
| Administrative Systems |  |  |  |  |
| Business Office |  |  |  |  |
| Vendor |  |  |  |  |
| Other Consulting Firms |  |  |  |  |
| Hardware |  |  |  |  |
| Software |  |  |  |  |
| ITS Charges |  |  |  |  |
| **Totals** |  |  |  |  |

<If you indicate an increase in cost, specify whether the costs can be absorbed or whether a budget variance request will be needed.>

|  |  |  |
| --- | --- | --- |
| This project will … | Operating Budget Costs | Service Center Costs |
| Increase ongoing costs |  |  |
| Decrease ongoing costs |  |  |
| Neutral to ongoing costs |  |  |

* 1. Estimated Funding Source

Funding Source (if known): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. Contingencies

|  |  |  |  |
| --- | --- | --- | --- |
| **Flexibility Matrix** | **Scope** | **Schedule** | **Resources** |
| Least Flexible |  | **X** |  |
| Moderately Flexible |  |  | **X** |
| Most Flexible | **X** |  |  |

|  |  |
| --- | --- |
| Item | Description |
| Scope Contingencies | * <Workarounds> * <Prioritization of features> |
| Schedule Contingencies | * <Alternate release dates (if possible) and why these would be acceptable> * <Overlapping project phases and why this is acceptable> |
| Budget Contingencies | * <10% - 15% budget contingency – see section 3.1, “Estimated Project Costs”> * <10% extra of in-house resources resulting in over-time, borrowed resources from other projects, managers backfilling, etc.> |

1. Appendix
   1. 1st Section of Appendix <if needed>