

State of Vermont

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(Project Name)

Project Charter

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Prepared By: (Your Name)

Date of Publication: mm/dd/yyyy

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# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author(s)** | **Revision Notes** |
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# Project Overview

Provide a high level description of the project that includes the background and context for why it is being undertaken. Speak to the business value of the work being performed.

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# Project Objectives

List the Project Objectives in the table below. The Objectives are what you hope to achieve by undertaking this project. Next list Success Criteria for each Objective. The Success Criteria describes how you will know if the project was successful at meeting that Objective. Success Criteria must be SMART: Specific, Measurable, Attainable, Realistic, and Time-bound. Examples listed in table below.

|  |  |
| --- | --- |
| **Objective** | **Success Criteria** |
| *Implement a new XYZ solution to replace the outdated legacy system before the current contract expires.* | *The XYZ solution is implemented by/before 12/31/2015.* |
| *Reduce annual IT Operating cost* | *Annual operating costs associated with XYZ are reduced by 10%.* |
| *Improve customer service by improving the turnaround time for processing XYZ requests.* | *XYZ requests are completed within 48 hours.* |
| *Reduce the amount of manual labor required to perform XYZ business function.* | *State labor hours to perform XYZ business function are reduced by 10% annually.* |
|  |  |
|  |  |
|  |  |

# Project Scope

Scope statements are used to define what is within the boundaries of the project and what is outside those boundaries. Examples of areas that could be examined are data, processes, applications, or business areas. The following types of information can be helpful:

1. The types of deliverables that are in scope and out of scope (business requirements, current state assessment)
2. The major life-cycle processes that are in scope and out of scope (analysis, design, testing)
3. The types of data that are in scope and out of scope (financial, sales, employee)
4. The data sources (or databases) that are in scope and out of scope (billing, general ledger, payroll)
5. The organizations that are in scope and out of scope (human resources, vendors)
6. The major functionality that is in scope and out of scope (decision support, data entry, management reporting)

## In-Scope:

## Out of Scope:

*

## Project Milestones, Major Deliverables, & Estimated Duration:

List the project’s major milestones, deliverables, and the target dates for their delivery. This list should reflect overall project deliverables/outcomes, as well as the delivery of key project management or other project-related work products.

| **Milestone/Deliverable** | **Target**  **Date**  |
| --- | --- |
| **Project Start Date** |  |
| **Exploration** |  |
| **Initial Product Backlog** |  |
| **RFI** |  |
| **IT ABC Form** |  |
| **Finance Codes** |  |
| **Initiation Phase** |  |
| **Stakeholder List** |  |
| **Project Charter** |  |
| **Prioritized Backlog** |  |
| **Release Plan Roadmap** |  |
| **Planning** |  |
| **Request For Proposal** |  |
| **Independent Review (Over $1M in lifecycle)** |  |
| **Contract** |  |
| **Updated IT ABC Form** |  |
| **Execution** |  |
| **Release Schedule** |  |
| **Product Backlog** |  |
| **Sprint Backlog** |  |
| **Product Release** |  |
| **Closing** |  |
| **Final Deliverable/Product Acceptance** |  |
| **Lessons Learned** |  |
| **Closeout Report** |  |
| **Final IT ABC Form** |  |
| **Project End Date** |  |

## Organizations Affected or Impacted:

List the key internal (e.g. departments, functional areas, etc.) and external entities, including external end users who will be impacted by this project. Provide a brief description of the impact for each.

The impact of this project on other organizations needs to be determined to ensure that the right people and functional areas are involved, and communication is directed appropriately.

| **Organization** | **How Are They Affected, or How Are They Participating?** |
| --- | --- |
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|  |  |
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# Estimated Project Cost

List the estimated project costs below. Add lines as needed for other types of costs that aren’t listed in the table. Use the project’s approved ABC form for reference, but be sure the table below includes any new or updated cost information obtained since the project’s ABC form was approved.

|  |  |
| --- | --- |
| **Lifecycle of Solution (Max is 5 years, including implementation unless a waiver has been approved for a longer term)** |  |
| **Description of Costs** | **Implementation Costs** | **Annual Operating Costs** |
| **Vendor Implementation/Installation/ Configuration** |  |  |
| **Contracted Services for Project Management** |  |  |
| **Other Contracted Professional Services for Implementation** |  |  |
| **ADS EMPO Project Oversight & Reporting** |  |  |
| **ADS EPMO Project Manager for Implementation** |  |  |
| **ADS EPMO Business Analyst for Implementation** |  |  |
| **ADS Enterprise Architect for Implementation** |  |  |
| **ADS Security Staff for Implementation** |  |  |
| **Other ADS IT Labor for Implementation** |  |  |
| **Software/Licenses** |  |  |
| **Hosting** |  |  |
| **Equipment or Supplies** |  |  |
| **Vendor Annual Maintenance/Service Costs** |  |  |
| **Other State IT Labor to Operate & Maintain the Solution**  |  |  |
| **Other Costs (please describe below)\*** |  |  |
| **Sub-Total Costs** |  |  |
| **Total Lifecycle Operating Costs (*sub-total annual operating costs X year of lifecycle*)** |  |  |
| **Sub-Total IT Activity Costs (*Sub-total implementation costs + Total lifecycle Operating Costs*)** |  |  |
| **Estimated Independent Review Costs (*$25,000 for Projects with subtotal IT Activity costs over $1M*)** |  |  |
| **Total Implementation (*Sub-total implementation costs + Independent review costs*)** |  |  |
| **Total Project Costs (*Total Implementation + Total Lifecycle Operating costs*)** |  |  |

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# Project Assumptions

Certain assumptions and premises need to be made to identify and estimate the required tasks and timing for the project. Based on the current knowledge today, the project assumptions are listed below. If an assumption is invalidated at a later date, then the activities and estimates in the project plan should be adjusted accordingly.

 Assumption 1:

 Assumption 2:

 Assumption 3:

#

# Project Risks

Project risks are characteristics, circumstances, or features of the project environment that may have an adverse effect on the project or the quality of its deliverables. Known risks identified with this project have been included below. A plan will be put into place to minimize or eliminate the impact of each risk to the project.

|  |  |  |
| --- | --- | --- |
| **Risk Area** | **Level (H/M/L)** | **Risk Plan** |
| 1.  |  |  |
| 2.  |  |   |
| 3.  |  |  |

# Project Organization

An appropriate project organization structure is essential to achieve success. The following list depicts the proposed organization:

**Project Executive Sponsor:**

A senior member of the project team obtains budget for the project and signs off on project documents

**Project Sponsor:**

Champions the project, accepts responsibility for problem resolution as a result of issues escalated from the project manager, and signs off on project documents

**Business Lead:**

The person who is most interested in the product or service being provided under this scope of work. They are typically the main point of contact from the business and are accountable for making sure that all project tasks that belong to the business team get done and support the project manager.

**Subject Matter Expert:**

**Steering Committee Members:**

**Project Manager:**

**Project Team Members:**

# EPMO Role

The Agency of Digital Services, Enterprise Project Management Office (EPMO), is required by state statute 3 VSA 3301 to provide Project Management resources and services delivering oversight, monitoring, and control to IT Activities in the State.

The EPMO resources are responsible for providing standards for the management, organization, and tracking of information technology activities within the State government. The EPMO is also responsible for IT Activity record-keeping throughout the life of the project for the following records:

* A business case, including life-cycle costs and sources of funds for design, development, and implementation, as well as maintenance and operations. The business case shall include expected benefits, including cost savings and service delivery improvements.
* Detailed project plans and status reports, including risk identification and risk mitigation plans
* Annual Report and Budget – The following are two requirements for the Enterprise Project Management Office to submit in the Agency Annual Report:
	+ an outline summary of information, including scope, schedule, budget, and status for information technology projects
	+ a summary of the independent review

(*the following text can be removed if an Independent Review is not needed for the specific project*)

The Agency of Digital Services is responsible for obtaining independent reviews for IT activities with estimated life-cycle costs (implementation and operation costs) over $1,000,000.00 as per state statute 3 VSA 3303. The EPMO IT Portfolio Manager facilitates Independent Reviews. The independent review must include the following components:

* an acquisition cost assessment.
* a technology architecture and standards review.
* an implementation plan assessment.
* a cost analysis and a model for benefit analysis.
* an analysis of alternatives.
* an impact analysis on net operating costs for the agency carrying out the activity; and
* a security assessment.

## Project Approach

The project management approach will follow the State of Vermont’s Enterprise Project Management Office standards, which is a hybrid model incorporating industry best practices following the discipline of the PMI model and Agile methodology using the Scrum framework for project execution. Each project, under this approach, is managed from the initiation of the project to closure. Outside resources, such as vendors and subcontractors, are managed as additional resources to the project plan.

The assigned ADS Project Manager will manage each project using the established EPMO standards. When applicable, the ADS Project Manager will work with a vendor project manager to manage projects according to these standards. Any deviations from the standards required for project specific reasons will be noted in this project charter.

*\*Full details on EPMO Project Management standards can be found on the EPMO website.*

### Deviation from EPMO Project Management Standards: (explain or write N/A if not applicable and remove this statement)

# Organization Chart:

*(For project team, including business staff, ADS staff, etc., remove this statement before finalizing)*

# Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name and Title** | **Signature** | **Date** |
| Executive Sponsor |  |  |  |
| Project Sponsor |  |  |  |
| Business Lead |  |  |  |
| ADS IT Director |  |  |  |
| ADS IT Portfolio Manager |  |  |  |
| ADS IT Program Manager |  |  |  |
| ADS IT Project Manager |  |  |  |