

PMO Project Charter

Table 1. Document version

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Approver	George J. Raymond – Project Sponsor

Table 2. Document revision history

Version	Date	Revision Description
1.0	dd/mm/yyyy	Initial Draft Release

Introduction: How to Use This Template

To use this template, simply remove unneeded text and customize to align with the new project. When complete, delete all introductory or example text and convert all remaining text to black prior to distribution.

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1 Introduction

1.1 About this document

This Project Charter specifies the parameters of a Project undertaken by Nextgenray. It serves as an **agreement between the project owner/sponsor, the project manager**, and other personnel involved with the project.

The charter is a document that **officially starts a project**, and **outlines high-level planning information** such as scope, deliverables, and assumptions. The Project Charter documents the scope of the project and the commitment in time and cost, based on assumptions made. The project team is identified, and parameters of project status update and project changes are specified. At the end, **all parties involved are to sign off** on the finished document.

1.2 Terms and Definitions

Terms	Definitions
PMO	Project management office
SME	Subject matter expert
SOP	Standard operating procedure
Goal	Objective to be achieved by the project
Business Benefit	Project outcomes that can be <i>measured</i> and directly correspond with an identified business value . Business Benefits can start to be tracked throughout the project; however, the project sponsor with collaboration with the Project Manager will be accountable for reporting on the progress of the benefits attainment post project.
Project Scope	The intended work of a project or defined features and/or functions of a product to be completed.
Functional Requirement	Necessary features for the product/service to function as intended. i.e., capabilities, usability, and operations required for the product/service.
Project Deliverable	A defined output of the project.
Project Constraint	Factors that can negatively impact the scope, budget, and timeline of the proposed project . Constraints have the potential to alter the success of a project.
Project Assumption	Factors that are understood to be true for the purposes of planning the project.

2 Project Purpose

2.1 [Project Name] Brief Introduction

Provide a brief introduction to the project that communicates the current state, future state, and business justification for project initiation.

2.2 Goals

Provide a high-level list of the goals the project is expected to achieve. Prioritize goals as high, medium or low.

ID	Goal Description	Priority (high/normal/low)
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1	Establish PMO Office	High
2	Hire PMO Director	High
3	Staff PMO	High
4	Create PMO Roadmap	Normal
5	Foster knowledge base development	Low
6	Improve shared document management	Low

2.3 Business Benefits

What benefits will this project provide for the users, customers, and the organization?

Note that benefits that link directly to the business case are of the highest priority. If changes to scope are requested that will impact these key benefits, the threshold for change approval must be high and the change assessment rigorous. Include all the quantitative and qualitative benefits defined in the business case, as well as any new benefits that have been defined since.

Use the chart below to list all project benefits.

[Insert Link to Project Justification Document when needed]

ID	Benefit Category	Benefit Description	Key Performance Indicator (KPI)	Impacted Stakeholders
1	Efficiency	Increased productivity	Average Satisfaction Score Improvement from 6/10 to 8/10	Entire organization
2	Better Project Delivery	Better Project Delivery	Number of projects in scope, on time and on budget	Entire Organization
3	Decision Making	Improve Quality of Decisions	Improved outcomes – subjective scale (survey)	Entire organization
4	Product Quality	Improve product quality	Errors fixed, subjective scale (survey)	Entire organization

Project Scope

Project scope clearly indicates what issues and topics will and will not be addressed during the project. Scope should be broken down granularly according to the area of the organization and infrastructure affected. Examples are provided below.

2.4 Scope Inclusions

These tasks are all within the scope of the project and will be resolved.

ID	Scope Item	Details
1	Projects and programs	List projects and programs either proposed or in progress in one centralized place
2	Create portfolio view	Create a portfolio view of projects and programs across
3	Go/no-go decision points	Articulate/understand and establish project go/no-go decision points across the portfolio
4	Project dependencies + interdependencies	Determine dependencies + interdependencies of top 10 enterprise projects
5	Submission of new projects	Create process to submit new projects and programs to Transformation Office for portfolio view
6	Portfolio planning process	Create and implement formal process for next year's project planning to portfolio view

7	Project reporting / governance templates	Establish simplified project reporting templates for project progress tracking and portfolio views
8	Project initiation process	Establish a structured approach to initiating new projects (project inputs, outputs, decision, assignment of resources etc.)

2.5 Project Deliverables

The following are high-level deliverables. There may be more specific deliverables defined as the detailed project planning progresses. Note: It may be determined during the engagement that some of these deliverables are no longer applicable or appropriate for the scope of work described herein. Any additional deliverables must be identified and approved through the defined project change management process.

ID	Deliverable	Description	Presentation Format
1	Hire PMO/PMO Lead	Hire Program Manager/PMO Lead	Word job description
2	Project Charter	Create project charter document	Word
3	Kick-Off Deck incl. RACI	Create kick-off deck	PowerPoint
4	Process + templates for project input into portfolio view	Create process and associated templates	Visio format for the process-related artefacts. Excel and Word for the templates
5	Process + templates for year planning with portfolio view	Create process and associated templates	Visio format for the process-related artefacts. Excel and Word for the templates
6	Process + templates for project initiation	Create process and associated templates	Visio format for the process-related artefacts. Excel and Word for the templates
7	Process + templates + reports for portfolio views	Create process and associated templates	Visio format for the process-related artefacts. Excel and Word for the templates
8	Communications Plan	Plan document	Word or Excel
9	Change Plan	Plan document	Word or Excel

2.6 Project constraints and assumptions

List all constraints and assumptions that might impact scope, budget, or timeline. A few examples are listed below. Customize the examples as needed and add additional constraints and assumptions.

ID	Constraint	Assumptions
1	Competing priorities	Sufficient human and financial resources to complete the project
2	Executive buy-in	Support from leadership
3	Engaged project sponsor	Project Sponsor will attend status report meetings
4	Change Management	Change managers report to marketing department
5		

2.7 Project exclusions and other notes

List any scope items that are not included in the scope of the project. All miscellaneous but notable items regarding the scope of the project should also be listed here.

ID	Scope Item	Details
1	Training of Project Managers	Not expected to train business Project Managers
2	Establishing and/or rolling out Project Management delivery frameworks or methodology	Not expected to rollout PM delivery framework or methodology to PM's
3	Centralizing project management	PMO will not supply Business project managers

5	Monitor project financial performance	PMO will not monitor the ongoing financial performance of projects
	Provide Change Management	PMO will not supply change resources, due to current organizational structure constraints

3 Key Stakeholders

A stakeholder is any person, group, or organization who is:

- Affected by the project or perceives that they might be affected by the project (this includes user groups)
- Can influence the project and its outcomes

It is essential that you identify project stakeholders so that you can effectively manage their expectations. You will need to identify those key stakeholders who can impact project outcomes and those who might resist the project. Identifying stakeholders is the first step to communication management and organizational change management (preparing users to accept the change and managing the implementation of change).

More details will be provided on the stakeholder register, but all stakeholders should be identified in your charter using the table below:

ID	Name of stakeholder/ impacted user group	Role	Degree to which stakeholder is impacted by this project (1-10)	Degree to which stakeholder can influence project outcomes (1-10)
1				
2				
3				
4				
5				

3.1 Roles and responsibilities

This section describes who is doing what for the project. It includes a listing of each person involved and the role they will play. These roles include the following:

- **Project sponsor:** This person (or persons) initiates the project and is ultimately responsible for it. Usually, functional managers sponsor a project to achieve something in their departments.
- **Project manager:** This person is responsible for implementing the project plan.
- **Business unit representatives:** These people represent their departments or business functions within the project team and have authority from their departments to make decisions on their behalf.

ID	Role	Name	Position	External/Internal
1	Project Sponsor			
2	Project Manager			
3	Business Unit Representative			
4	Business Analyst			
5	Project Coordinator			
6				

4 Projected Timeline

4.1 High-level timeline by quarters

This table should provide a high-level view of the lifecycle of the implementation, in order to keep the project on track. It should be modified as new issues arise, processes are streamlined, or organizational makeup changes. More granularities can be documented in the Milestones section below.

Year	Q1	Q2	Q3	Q4
2024				

4.2 Milestones/interim deliverables

Important milestones and their target dates should be recorded here to help keep the project on track.

ID	Milestone	Planned Start	Planned Completion
1	Project resource hired (Prog. Mgr. / PMO Lead)		
2	Project kicked-off		
3	Pacific Portfolio 2024 view initial draft		
4	Final Comms Plan		
5	Final Change Plan		
6	Project Initiation Process defined		
7	Portfolio Planning Process defined		
8	Project Submission to Portfolio process defined		
9	Project Initiation templates defined + rolled out		
10	Portfolio view templates + reports defined + rolled out		
11	Portfolio reporting tool selected & rolled out		

5 Projected Budget

This is the estimated amount of money and other resources (e.g. user time) required for the project.

[Department] funding amount available for this project is:
\$ XXX

[Department] allocated time for this project is:
X days

- The project budgeted allocation does cover:**
- The purchase of a PPM software suite
 - IT time allocated towards communication and training efforts

- The project budgeted allocation does not cover:**
- IT overtime

6 High-Level Risk Assessment

This area highlights some of the potential risks and some basic measures that can be taken to mitigate them. Indicate who is responsible for monitoring and resolving these risks.

ID	Risk	Mitigation Measure	Risk Owner
1	Poor adoption of the PMO processes and procedures	<ul style="list-style-type: none">• Limit scope of what is trying to be achieved with realistic outcomes• Implement appropriate change + comms plan to prepare the business	
2	Insufficient resource / bandwidth to carry out PMO activities	<ul style="list-style-type: none">• Create/raise business case to consider additional resourcing as appropriate	
3	PMO project resource not hired / not found	<ul style="list-style-type: none">• Limit scope of what is trying to be achieved with realistic outcomes	