Project Charter

Template

Version 4.5 ● APRIL 1, 2021

Using this Template

To create a deliverable from this template:

1. Delete the template title page (previous page) and this page.
2. Replace [bracketed text] on the cover page (next page) with your project and the requesting office name.
3. Replace [bracketed text] in the tool header area at the top of page i (Contents page) with the same project and office name as on the cover page.
4. Do not remove or modify content in the footer area.
5. Each section contains abbreviated instructions, shown in *blue italics*, and a content area. The content area is marked with a placeholder symbol (Þ) or with a table.
6. Each section contains the following categorization:

* **Rule Chapter 60GG-1 Required** – The section/field must be completed in compliance with Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.).
* **Rule Chapter 60GG-1 Recommended** – The section/field is not required; however, under Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.), it adds value and therefore should be considered as part of the project documentation.
* **FDOT Required** – The section/field must be completed in support of Innotas, the Department’s Portfolio Management Tool used for reporting and tracking projects.
* **FDOT Recommended** – The section/field is not required; however, the information provided adds value and provides consistent project documentation throughout Department projects.

1. The various sections and fields found in the template and tool must not be removed or rearranged. Where relevant, use N/A to indicate that the section/field is not applicable to this project.

Note: The *italicized blue instructions* within the template may be removed.

1. Update the table of contents by right-clicking and selecting “Update Field,” then “Update page numbers only.”
2. If this template does not fit the needs of the project, specifically document in the Project Management Plan (PMP) that deviation from this template is necessary. Any altered, added or removed sections to the template must be approved by the signatories listed on the PMP template. Note: Any modifications to the approved template must still meet the minimum requirements of Rule Chapter 60GG-1, Florida Administrative Code (F.A.C.).
3. The signatories listed on the signature page of this document must be obtained to meet the minimum FDOT requirements for approval. As appropriate for the project, additional stakeholder signatures may be requested to establish ownership and accountability.

Template Revision History

| **Version** | **Date** | **Name** | **Description** |
| --- | --- | --- | --- |
| 3.0 | 04/28/2017 | Melissa Elrod | Original Creation |
| 4.0 | 01/01/2019 | Melissa Elrod | Formatting Revisions |
| 4.1 | 11/22/2019 | Dreunna Holland | Updated 74-1 to 60GG-1 |
| 4.2 | 08/19/2020 | Schelley Cassidy | Updated from .doc to .docx |
| 4.3 | 1/11/2021 | Courtney LK | Revised 2.3.1 from Recommended to Required |
| 4.4 | 03/04/2021 | Courtney LK | Updated FAC to FC & Functional Application Coordinator to Functional Coordinator |
| 4.5 | 4/1/2021 | Courtney Lewis-Kroodsma | Removed “(internal projects only)” from OIT Section Manager signature page |

Project Delivery Methodology (PDM)

PROJECT CHARTER

[Functional Office(s) Name]

[PROJECT NAME]

|  |  |
| --- | --- |
| VERSION: [VERSION NUMBER] | REVISION DATE: [DATE] |

Approval of this Project Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

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| **Project Sponsor** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

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| **<Business> Functional Coordinator (FC)** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

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| --- | --- | --- |
| **OIT Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **Project Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **Contract Manager (external projects only)** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

|  |  |  |
| --- | --- | --- |
| **OIT Section Manager** | | |
| [Name] | [Email] | [Telephone] |
| Signature | | Date |

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# Section 1 Project Definition

## 1.1 Project Scope Summary

*If the project’s R&C Category is a 1 or 2, fill out the questions below. If the project’s R&C Category is a 3 or 4, fill out the separate Business Case Supplement.*

## 1.1.1 Why is the project necessary?

**Rule Chapter 60GG-1 Required for R&C Categories 1-2**

*Identify in a concise statement any related federal, state, statute, or rule mandates.*

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## 1.1.2 What is the problem being solved?

**Rule Chapter 60GG-1 Required for R&C Categories 1-2**

*Briefly describe the business problem the project would solve. State the business problem in simple terms, without describing how the problem will be addressed.*

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## 1.2 Cost Benefit Analysis

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Include a brief discussion of any cost savings or cost avoidance expected, if applicable.*

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## 1.3 Project Description / High-Level Requirements

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe the approach the project will use to address the business problem as described in the Problem Statement. Provide a general definition of the information and/or high-level requirements associated with the proposed business process or solution. The description should summarize key information, including how the project will deliver the expected business outcomes and performance objectives.*

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## 1.4 Project Goals and Objectives

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe the* ***project*** *goals and objectives of the project. Goals state what the desired end result is, and objectives state how the desired result will be achieved. Refine the goals and objectives stated in the Business Case Study, if one was provided.*

Þ

## 1.5 Business Goals and Objectives

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe the* ***business*** *goals and objectives of the project. Goals state what the desired end result is, and objectives state how the desired result will be achieved. Refine the goals and objectives stated in the Business Case Study, if one was provided.*

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## 1.6 Initial Project Scope

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe the project scope. The scope defines the project limits and identifies the products and/or services delivered by the project. The scope establishes the boundaries of the project and should describe products and/or services that are outside of the project scope.*

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| **Project Includes** |
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| --- |
| **Project Excludes** |
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## 1.7 Project Assumptions

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe any project assumptions related to business, technology, resources, scope, expectations, or schedules.*

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## 1.8 Project Constraints

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Describe the limiting factors, or constraints, that restrict the project team’s options regarding scope, staffing, scheduling, and management of the project.*

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## 1.9 High-Level Project Risks

## Rule Chapter 60GG-1 Required for R&C Categories 1-4

*Identify high-level risks facing the project.*

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# Section 2 Project Authority and Milestones

## 2.1 Project Funding Authority

## 2.1.1 Project Budget

**Rule Chapter 60GG-1 Required for R&C Categories 1-4**

*Document the project initial estimates for budget.*

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**FDOT Recommended for R&C Categories 1-4**

*Identify the specific fiscal year cost totals over the life of the project. Include the overall total cost of the project. Modify the table below as needed.*

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| --- | --- | --- | --- |
| **FY < >** | **FY < >** | **FY < >** | **Project Total** |
|  |  |  |  |

## 2.1.2 Funding Source

**FDOT Recommended for R&C Categories 3-4**

*Identify the funding amount and source of authorization and method of finance (i.e., capital budget, rider authority, appropriated receipts) approved for the project.*

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## 2.1.3 Major Expense Categories

**FDOT Recommended for R&C Categories 3-4**

*Identify the breakdown of the project’s costs by major expense categories (Contract Services, Expense, Other Capital Outlay, etc.).*

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## 2.2 Project Oversight Authority

**FDOT Recommended for R&C Categories 1-4**

*Describe management control over the project. Describe external oversight bodies and relevant policies that affect the agency governance structure, project management office, and/or vendor management office.*

Þ

## 2.3 Initial Project Estimate

## 2.3.1 Duration

**Rule Chapter 60GG-1 Required for R&C Categories 1-4**

*Provide a high-level estimate for the duration of the requested IT project. The preliminary estimate is based on the Project Scope and subject to change as the IT project is refined in future phases. A chart has been provided below to assist with outlining major project milestones, but is not required.* ***If the chart is not used, the PM is still required to provide high-level estimates for the duration of the project****.*

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| --- | --- | --- |
| **Stage/Phase** | **Begin Date** | **End Date** |
| Project Planning |  |  |
| Application Development |  |  |
| Project Closure |  |  |

## 2.3.2 Work Effort

**Rule Chapter 60GG-1 Required for R&C Categories 1-4**

*Provide a high-level estimate for the work effort (hours) of the requested IT project. This preliminary estimate is based on the Project Scope and subject to change as the IT Project is refined in future phases.*

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# Section 3 Project Organization

## 3.1 Project Roles and Responsibilities

**Rule Chapter 60GG-1 Required for R&C Categories 1-4**

*Summarize the roles and responsibilities for the project team and stakeholders identified in the project structure above.*

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## 3.2 Centralized Project Repository

## 3.2.1 Centralized Project Repository Establishment

**Rule Chapter 60GG-1 Required for R&C Categories 1-4**

*Indicate whether the following statement is True or False.*

“A centralized repository exists to house and archive all project documentation.”

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## 3.2.2 Explanation for Centralized Project Repository

**FDOT Recommended for R&C Categories 1-4**

*If false, please explain. If true, provide a link to the project’s SharePoint site.*

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## 3.3 Project Manager

## 3.3.1 PMP® Certification

**Rule Chapter 60GG-1 Required for R&C Categories 3-4**

*Indicate whether the following statement is True or False.*

“The Project Manager is PMP® Certified.”

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## 3.3.2 PMP® Certification Number

**FDOT Recommended for R&C Categories 3-4**

*If true, include PMI Certification Number.*

Þ

# Section 4 Project Glossary

*Define all terms and acronyms required to interpret the Project Charter properly.*

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# Section 5 Document Revision History

*Identify document changes.*

| **Version** | **Date** | **Name** | **Description** |
| --- | --- | --- | --- |
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# Section 6 Appendices

*Include any relevant appendices.*

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