## Procedure 410P6: Completing a Project Charter

<table>
<thead>
<tr>
<th>VERSION NUMBER</th>
<th>Procedure 410P6-01</th>
</tr>
</thead>
<tbody>
<tr>
<td>VERSION DATE</td>
<td>October 1, 2017</td>
</tr>
<tr>
<td>PROCEDURE TITLE</td>
<td>Competing a Project Charter</td>
</tr>
<tr>
<td>GOVERNING POLICY</td>
<td>This procedure is governed by the current Policy 410: IT Project Initiation, regardless of revision.</td>
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<td>TERMS AND DEFINITIONS</td>
<td>Office of Information Technology (OIT) – formed through the passage of Senate Bill 117, to focus on three statutory mandates: IT Strategic Planning, IT Governance, and IT Resource Utilization. Project Charter – formally authorizes the existence of a project and provides the Project Manager with the authority to apply organizational resources to project activities. It established a partnership between the performing and sponsoring organizations as well as internal agreement among stakeholders. Project Initiation Packet – This packet consists of three documents: the Project Request Form, the Project Business Case Document, and the Project Charter. This packet is to be submitted to OIT for project governance.</td>
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<td>OBJECTIVE</td>
<td>The objective of this procedure is to provide guidance on how to complete and submit the Project Charter to OIT. The Project Charter is part of the Project Initiation Packet.</td>
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<tr>
<td>PURPOSE</td>
<td>This procedure’s purpose is to provide instructions for completing the Project Charter.</td>
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| SUPPORTING DOCUMENTS | The following documents support this Procedure:  
  • Policy 410: IT Project Initiation |
1 Introduction

1.1 Inputs
   • The Project Charter is part of the Project Initiation Packet.
   • The Project Request Form and Business Case must be submitted along with the Project Charter to OIT.
   • The Project Initiation Tool can be used to complete the Project Charter, using Template 410T1 – Project Initiation Tool, which can be downloaded from OIT’s website.
   • The Project Charter Template can be downloaded from OIT’s website using Template 410T6 – Completing a Project Charter.

1.2 Entry Criteria
   The Project Charter must be approved by its stated approving authorities prior to being submitted to the OIT.

1.3 Procedural Steps
   If using the Template 410T1: Project Initiation Tool to produce a Project Charter, follow the steps below:
   
   1. Open the Project Initiation Tool using Template 410T1.
   2. Select the ‘Project Information’ link that is located under the Navigation menu.
   3. Complete all the fields on the Project Information screen.
   4. Return to the Dashboard and select the ‘Business Case’ link that is located under the Navigation menu.
5. The following subsections of the Business Case are required for the Project Charter:
   - Executive Summary Narrative
   - Anticipated Outcome
   - Major Project Milestones
   - Procurement Strategy
   - Project Approvals

6. Once all fields have been completed on the Project Information and Business Case screens, return to the Dashboard in order to save the information to the template.

7. To view the Project Charter, select the ‘Project Charter’ link that is located under the Reports Menu.

If using OIT Template 410T6: Project Charter Template, follow the steps below:

1. Open the Project Charter Template using Template 410T6 which can be downloaded from the OIT website.
2. The cover page should be completed by adding:
   - Project Name – the name of the project
   - Name of Sponsoring Agency – the sponsoring agency of the project
   - Project Number – the project number is determined using the agency acronym and the date of the project request. The format is “Agency Acronym-Year-Day-Month” (Ex: OIT-2017-1-1).
3. Complete the Project Information section:
   - Project Number – the project number is determined using the agency acronym and the date of the project request. The format is “Agency Acronym-Year-Day-Month” (Ex: OIT-2017-1-1).
   - Project name – the name of the project
   - Project Start Date – the day that you anticipate starting work
   - Estimated Completion Date – the date all project work is expected to be complete
   - Implementation Date – the date the system or solution is placed into production
   - Estimated Project Budget – a dollar figure estimation of the project budget
   - Estimated Benefit Value – a dollar figure estimated of the benefit value of the project
4. Complete the Key Project Stakeholders section:
   - Project Sponsor name, agency, email, and phone number
   - Project Owner name, agency, email, and phone number
   - Product Owner name, agency, email, and phone number
   - Project Manager name, agency, email, and phone number
5. Complete the following sections by replacing the blue italic text with your input (the items in blue italic text are remarks designed to give guidance on what should be entered in that section.):
   - Executive Summary
   - Project Scope
   - Anticipated Outcome
6. Complete the Approval section by securing signatures of the designated approving authorities.

2 Verification/Supporting Data

2.1 Outputs
The completed Project Charter should be submitted to OIT as part of the Project Initiation Packet.

2.2 Responsibility/Authority
OIT has approved this procedure and has the authority to ensure compliance with this procedure.

2.3 Deviation/Tailoring
There should not be any deviations or tailoring permitted to this procedure. If deviations or tailoring are required, a request must be submitted to OIT.

The undersigned, as Acting Secretary of Information Technology of the State of Alabama, exercising the power vested in that Office by the laws of this State, declares this Procedure to be available for adoption as of the ___1st day of _____ October ______, 2017__.

Jim Purcell
Acting Secretary of Information Technology

DOCUMENT CHANGE HISTORY

<table>
<thead>
<tr>
<th>Version</th>
<th>Release Date</th>
<th>Comments</th>
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<tbody>
<tr>
<td>410P6-01</td>
<td>October 1, 2017</td>
<td>Initial version</td>
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