



STATE OF ALABAMA

OFFICE OF INFORMATION TECHNOLOGY



Procedure 410P6: Completing a Project Charter

VERSION NUMBER	Procedure 410P6-01
VERSION DATE	October 1, 2017
PROCEDURE TITLE	Completing a Project Charter
GOVERNING POLICY	This procedure is governed by the current Policy 410: IT Project Initiation, regardless of revision.
TERMS AND DEFINITIONS	<p>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.</p> <p>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.</p> <p>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.</p>
OBJECTIVE	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.
PURPOSE	This procedure’s purpose is to provide instructions for completing the Project Charter.
SUPPORTING DOCUMENTS	<p>The following documents support this Procedure:</p> <ul style="list-style-type: none">• Policy 410: IT Project Initiation

- Procedure 410P1: IT Project Initiation Phase
- Procedure 410P2: Completing a Project Request Form
- Procedure 410P3: Completing a Business Case
- Procedure 410P4: IT Project Sizing
- Template 410T1: Project Initiation Tool
- Template 410T6: Project Charter Template

EFFECTIVE DATE	This Procedure shall be effective upon its approval by the Secretary of Information Technology, as evidenced by the signature of the Secretary being affixed hereto.
SUPERSEDES	This is the initial policy and does not supersede a previous version.
PROCEDURE	Completing a Project Charter

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

- Anticipated Project Milestones
 - Procurement Strategy
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 , 20 17 .



 Jim Purcell
 Acting Secretary of Information Technology

DOCUMENT CHANGE HISTORY

Version	Release Date	Comments
410P6-01	October 1, 2017	Initial version