



## Project Charter – Activity Definition

### Purpose:

The Project Charter is a concise document that establishes the purpose of the project, establishes its scope, and explains what business value it hopes to provide to the organization. The objective of this activity is to secure management approval and to provide the Project Manager with the authority to apply organizational resources to project activities. The charter becomes a source of reference for the project team.

When determining initial project scope, directors should consider breaking large, multi-year projects into smaller projects. The PPMO can provide advice on how to do this. No work can start on a project until the charter is approved and filed with the PPMO. Approved charters will be e-mailed to the PPMO and will be available on the CIO ELAN at <\\cio-fs1\Groups\CIO PPMO\Charters>. Once a project is approved and scheduled, the project manager must file a status/progress report with the PPMO monthly.

### Participants:

- The **charter author (director or project manager)** will use the charter template supplied by the PPMO. They should work with the business unit and other stakeholders to gather the information needed to complete the charter before submitting it for PPMO review.
- The **PPMO** will provide feedback to the project manager via the project charter review checklist. The project manager will revise the document and resubmit it for PPMO review.
- The **Sr. Leadership Team** reviews charters. Charters ***must be reviewed internally*** before being sent to **sponsors/business units** for review/approval.

### Inputs:

CIO Tracking Log entry  
Business Case/Proposal

### Outputs:

Project Charter

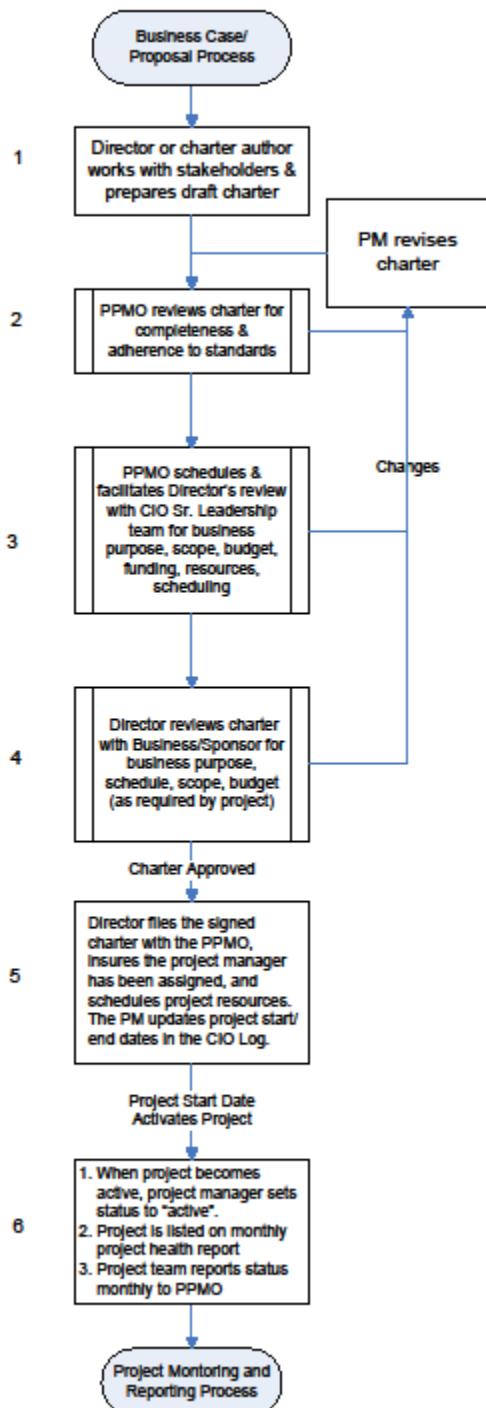
### Process:

All projects will follow the process on the following page.

### Note that:

- Projects must be recorded in CIO Project Tracking Log prior to this process. Directors are responsible for projects entered into the log from their areas.
- Attach documentation, if necessary, to support any of the sections in the charter.
- This document needs to be approved by the relevant stakeholders.
- Maintain versions and details of what changes are made in what version.

### Project Chartering Process



#### Overview and General Instructions

During the strategic planning process we identified several problems we have with projects today:

- ✓ Many projects
- ✓ Not sure which projects are active
- ✓ Not enough resources to complete projects on time
- ✓ Resource contention among projects
- ✓ Project scope often not clear

This process is part of a solution to these problems that will allow us to have more control over the number and types of projects we are doing, ensure we schedule projects to match our capacity, and to improve project performance through better project definition and control.

When determining initial project scope, directors should consider breaking large, multi-year projects into smaller projects. The PPMO can provide advice on how to do this.

- All new projects will follow this process.
- Projects must be recorded in CIO Project Tracking Log prior to this process. Directors are responsible for projects entered into the log from their areas.
- In step 1, the charter author (director or project manager) will use the charter template supplied by the PPMO. **They should work with the business unit and other stakeholders to gather the information needed for the charter . Be sure to confirm the goals and objectives of the project with the sponsors and stakeholders before completing the charter and submitting it for PPMO review (cio-ppmo@osu.edu) in step 2**
- Step 2, the PPMO will provide feedback to the project manager/author via the project charter review checklist and consultation. The project manager/author will revise the document and resubmit it for PPMO review.
- Step 3, charters **must be reviewed internally** before being sent to sponsors/business units for approval.
- Step 4, review the charter with the business sponsor as described. If accepted, have them sign it.
- If one of the reviews sends the charter back to the PM for changes, the PPMO will work with the Director/PM to determine if another review by the Sr. Leadership or the Sponsor are required.
- No work can start on a project until the charter is approved and filed with the PPMO. Approved charters will be emailed to the PPMO and will be available to all on \\cio-fs1\Groups\CIO PPMO\Charters.
- Once a project is approved and scheduled, the project manager must file a status/progress report with the PPMO monthly.



### **Project Charter Guidelines**

1. Complete the template sections as indicated on the template document. View a sample project charter at [http://cio.osu.edu/projects/framework/framework\\_matrix.html](http://cio.osu.edu/projects/framework/framework_matrix.html).
2. Submit charter via e-mail to PPMO for review.
3. The PPMO will provide feedback to the project manager via the project charter review checklist and consultation. If changes are indicated, make changes to project charter and resubmit to PPMO office.
4. Once charter is approved with appropriate signatures, scan and e-mail to PPMO.
5. Approved charters will be e-mailed to the PPMO (cio-ppmo@osu.edu) and will be available on the CIO ELAN at <\\cio-fs1\Groups\CIO PPMO\Charters>.
6. Once a project is approved and scheduled, the project manager must file a status/progress report with the PPMO monthly. Follow the Project Monitoring and Reporting Process for details.