

Centers for Medicare & Medicaid Services

<Business Owner’s Office/Center>

<Business Owner’s Group>

7500 Security Blvd

Baltimore, MD 21244-1850

Project Charter

Version:<1.0>

**Last Modified**: <Month Day, Year>

*[Project Charter Template Version 2.2 – February 11, 2010]*

*Approved for use by the Investment Life Cycle Steering Committee*

**Document Number:** <document’s configuration item control number>

**TEMPLATE REVISION HISTORY**

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Organization/Point of Contact** | **Description of Changes** |
| 2.2 | 1/2009 | K. Maenner – OIS/EASG/DITPPA | Removed “IT Governance Review Board Approving Authority” as an approver on Approvals page. |
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***Note to the Author***

[This document is a template for creating a Project Charter for a given project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the particular project.

* Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.

When using this template, follow these steps:

1. Replace all text enclosed in angle brackets (e.g., <Project Name (Acronym)>) with the appropriate information for the specific project. These angle brackets appear in both the body of the document and in headers and footers.
2. Modify any boilerplate text as appropriate to the specific project.
3. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the section headings are Heading 1 (Times New Roman 16 pt and Section Sub-Headings are Heading 2 (Times New Roman 14 pt). The style used for boilerplate and body text is Body Text (Times New Roman 12 pt).
4. To update the Table of Contents, right-click and select “Update field” and choose the option “Update entire table”. Ensure that sub-headings at each level in the Table of Contents are appropriately indented for improved readability.
5. Delete this “Notes to the Author” page and all instructions to the author (i.e., all blue italicized text enclosed in square brackets) before finalizing the initial draft of the Project Charter.]

**APPROVALS**

[Obtain signature approval of the final document from the Business Owner and the IT Governance Review Board (e.g. ITIRB, TRB, etc.). Additional signature lines may be added as needed (e.g., Project Manager).]

**Business Owner Approving Authority:**

Signature Printed Name Date Phone Number

<Position Title> *[e.g., <CMS Business Component> Director]*

**REVISION HISTORY**

[Use the table below to record information regarding changes made to the document over time.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Organization/Point of Contact** | **Description of Changes** |
| 1.0 | <mm/dd/yy> | <Organization Identifier / Point-of-Contact Name> | Baseline Version |
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**LIST OF FIGURES**

*[Insert a List of Figures appearing within the Project Charter along with a page reference for each identified figure as appropriate. Labels of Figure titles and descriptions are to be placed centered, above the figure within the main body of the document. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.]*

<Figure #: Figure Title or Description……………………………………………Page Number>

**LIST OF TABLES**

*[Insert a List of Tables appearing within the Project Charter along with a page reference for each identified table as appropriate. Labels of Table titles and descriptions are to be placed centered, above the table within the main body of the document.]*

<Table #: Table Title or Description……………………………………………Page Number>

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# Introduction

*[Summarize the purpose of the document, the scope of activities that resulted in its development, the intended audience for the document, and expected evolution of the document. Also describe any security or privacy considerations associated with use of this document.]*

This Project Charter formally authorizes the existence of the <Project Name (Acronym)> and provides the authority to proceed and apply organizational resources to the project. The Project Charter reflects the goals and objectives of the project at a specific point in time. This document needs to be kept under configuration control and updated as necessary to reflect changes to project scope, schedule, and/or cost. The project stakeholders are the intended audience for the document.

# REFERENCED DOCUMENTS

*[Summarize the relationship of this document to other relevant documents (e.g., Candidate Project Fact Sheet, Business Process Models, Business Case, Requirements Document, Project Process Agreement (PPA), etc., if they exist).*

*Provide identifying information for all documents used to arrive at and/or referenced within the Project Charter (e.g., related and/or companion documents, prerequisite documents, relevant technical documentation, etc.).]*

**Table 1: Referenced Documents**

| Document Name | Document Number | Issuance Date |
| --- | --- | --- |
| <document name> | <document’s configuration item control number> | <Month Day, Year> |
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# overview

*[Provide an overview of the project background, the purpose of the project, and a high-level description of what the project entails. For example:*

*ABC Corporation has been experiencing substantial backlogs in their new claim requests based upon their antiquated processing system. They have contracted with <Contractor’s Name> to create a robust processing system. The purpose of this project is to create a system to more effectively handle ABC’s claims and decrease the turn-around time for each claim. The project entails the analysis, development, testing, implementation, and maintenance of the new claims processing system, as well as subsequent training of the ABC staff.]*

# GOals & OBJECTIVES

*[Summarize and correlate the strategic goals and business objectives of the project based on the CMS and business component’s strategic plans. Identify the project’s goals and objectives. Refer the reader to the Business Case, if one exists, for specific details. A project goal is a clear expression of the project’s target or direction (e.g., The project must be completed by* <Month Day, Year>*.). A project objective is a measurable statement of a particular desired outcome of the project (e.g., The processing for each claim must be reduced by 50%.).]*

# SCOPE

*[Define the scope of the project (i.e., project limits/boundaries, the products and/or services delivered by the project). Identify what the project includes, as well as specifically address what is out of scope (excluded). Refer the reader to the Requirements Document, if appropriate.]*

# FUNDING

*[Identify the funding amount, source of authorization, and method of finance approved for the project.]*

As of <Month Day, Year>, <source of authorization (e.g., the CMS Information Technology Investment Review Board (ITIRB)> approved the use of <$funding amount> from <funding source> for this project.

# TIMELINE

*[Identify the project’s duration and general timeline for the high-level milestones from the initial work breakdown structure (WBS). Complete and expand upon the content of the table below as appropriate.]*

**Table 2: Key Project Milestones**

| Milestone/Deliverable | Target Completion Date |
| --- | --- |
| Project Schedule |  |
| Project Management Plan (PMP) |  |
| Project Process Agreement (PPA) |  |
| Project Baseline Review (PBR) |  |
| <Milestone/Deliverable Item> |  |
| <Milestone/Deliverable Item> |  |
| <Milestone/Deliverable Item> |  |
| <Milestone/Deliverable Item> |  |
| Post-Implementation Review (PIR) |  |

# ASSUMPTIONS/CONSTRAINTS/RISKS

*[List the major known assumptions and constraints that will impact meeting the objectives of the project (e.g., budget or procurement obstacles). Describe the factors or characteristics that are deemed critical to the success of the project, such that in their absence the project will fail. Identify any dependencies that are outside the direct control of the project team or outside the scope of the project that will affect project success (e.g., dependent infrastructure projects). ]*

# Key Resources Assigned and Authority

*[List the CMS business owner, project management specialist (i.e., Program Manager, Project Manager or Project Coordinator), senior leadership authorities and/or executive sponsors (e.g., Center, Office, or Group Director or Deputy Directors who serve as decision-makers and authorities to commit organizational resources), technical advisor(s), and other dedicated team members (e.g., Contracting Officer, Project Officer(s), Government Task Leader(s), critical partners, business representatives, technical representatives, etc.) who will be bound to the project. Include the system developer or system maintainer resources, if known. Do not list team members whose participation is unknown or could change over time.]*

The Business Owner is <Business Owner’s Name (Organization)>. The Business Owner has the authority and fiscal responsibility for the project, which includes but is not limited to the following:

* Developing and managing the project budget throughout the life cycle;
* Analyzing the business process to identify business risks and ensuring that those risks are appropriately mitigated;
* Defining, validating, and endorsing the business needs, business process models, and requirements documentation;
* Ensuring the project complies with prescribed enterprise architecture standards and receives approval for architectural compliance by the CMS Chief Enterprise Architect;
* Ensuring that the project meets performance, cost, and schedule goals;
* Ensuring that appropriate security controls and privacy measures are maintained;
* Providing oversight and guidance; and
* Participating collaboratively with the Office of Information Services (OIS).

Program Manager is <Name of individual managing the program that this project supports (Organization)>.

The <Project Manager or Project Coordinator> is < Project Manager/Coordinator’s Name (Organization)>. In collaboration with the Business Owner and senior leadership/executive sponsors, the <Project Manager or Project Coordinator> has authority to:

* Select project team members,
* Manage the project schedule and activities, and
* Perform all project management activities as they relate to the project.

Senior leadership authority and/or executive sponsorship for the project is as follows:

* <Business Component Director’s Name (Business Component Name)>
* <OIS Group Director’s Name (Office of Information Services/ <Group Name>)>

Technical Advisor for the project is <Technical Advisor’s Name (Organization)>.

Other dedicated resources for the project include the following:

**Table 3: Other Dedicated Resources**

| **Name** | **Organization** | **Role** | **Estimated % of Effort** |
| --- | --- | --- | --- |
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# GLOSSARY

*[Provide clear and concise definitions for terms used in the Project Charter that may be unfamiliar to readers of the document. Terms are to be listed in alphabetical order.]*

**<Term Name>**

<Term definition>

**<Term Name>**

<Term definition>

# ACRONYMS

*[Provide a list of acronyms and associated literal translations used within the document. List the acronyms in alphabetical order utilizing a tabular format as depicted below.]*

|  |  |
| --- | --- |
| **<ACRONYM>** | <Literal Translation> |
| **CMS** | Centers for Medicare & Medicaid Services |
| **PMP** | Project Management Plan |
| **PPA** | Project Process Agreement |
| **WBS** | Work Breakdown Structure |