OE PROJECT CHARTER

PROJECT NAME:	Institutional Data Council Project Manager
PREPARED BY:	Josh Blatt
DATE (MM/DD/YYYY):	1/9/2012

PROJECT CHARTER VERSION HISTORY		
VERSION	DATE (MM/DD/YYYY)	COMMENTS (DRAFT, SIGNED, REVISED – CURRENT STATUS)
1	1/9/2012	Draft
2	2/19/2012	Revised by Pamela Brown

DOCUMENT PURPOSE

The Project Charter documents the formal conversation between the Project Sponsor and the Project Manager/Team, including the definition of success for the project.

Once approved, the Project Charter communicates the current agreement between the Project Sponsor and the Project Team throughout the lifecycle of a project. The Charter provides a high-level overview of the project including the definition of project success, and project resource (people and funds) requirements.

Requests and additions to the project scope are considered "out-of-scope" for the current project. When a scope change is required, document a change request that includes an impact analysis of project cost, resources, schedule, and risk. The Project Sponsor then formally approves the scope change request.

The project manager will retain additional documents that provide detail on the management of the project, including a communications plan, an issues log, a risk log, a change management plan, a budget, and a work schedule.

REVIEW & APPROVAL

(The Project Sponsor signature indicates approval of the Project Charter, and authorizes the Project Manager/Team to use identified resources to proceed with the detailed planning and execution of the project; using this charter as guide.)

PROJECT SPONSOR(S) NAME	SIGNATURE	DATE
Erin Gore		

CASE FOR CHANGE

(What is the Current Situation?)

As we attempt to move the campus to more effective and efficient practices, a foundational need is the capability to understand our current operations, set goals, measure success and continuously improve. While our campus collects a great deal of institutional data that could help answer those needs, it is too often trapped in disparate transactional systems that are inaccessible to analysts and decision makers. In an attempt to work around these deficiencies, enterprising individuals spend too much time developing shadow systems that are often incomplete, unreliable or insecure. We need reliable, integrated and accessible data, tools and training to move towards data driven decisions and effective management.

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PURPOSE
(What problem will be solved by the project? What value does this project add to the organization? How does this project align with the strategic priorities of the organization? What benefits are expected once the project is completed?)

The purpose of the Institutional Data Council Project Manager will be to help realize the vision mapped out by the Institutional Data Management and Governance (IDMG) initiative to "make institutional data easily accessible, reliable, consistent, and secure to support informed planning, decision making and communication by campus leaders." The Manager will funnel issues and initiatives to the IDC for their consideration. S/he will establish projects for the Enterprise Data Warehouse (EDW), oversee and coordinate project execution, and help build a sustainable environment for their widespread adoption. The manager will establish effective project intake, prioritization and approval mechanisms for ongoing EDW improvements.

RESULTS
(What does success look like? How do we know that the problem described above is resolved? This typically involves clarifying metrics for operations once the project is completed.)

#	SUCCESS MEASURE
1	*The EDW will deliver timely projects that build trust, adoption and satisfaction from the campus community*
2	*A organized and transparent process for approval of high priority new projects is used for all EDW projects*
3	*EDW projects will be aligned with IDMG goals, adopt project management practices that lead to success, and work in a coordinated manner*
4	*The IDC will have timely information on campus efforts towards reliable decision support*
5	*Issues requiring data governance from IDC will be escalated*
6	*EDW and IDMG will have more visibility, understanding, and buy-in on campus*

SCOPE
(The scope defines the boundaries in terms of where the project begins and ends. The scope describes what will be delivered - where, when, and how. It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery.)

The project begins with the recruitment and onboarding of the manager and ends two years after the start date of the program manager. Specific deliverables are outlined in the results section above and the milestones & deliverables sections below.

PROJECT CONSTRAINTS & ASSUMPTIONS
(List the known and anticipated constraints, and the initial assumptions for the project.)

#	NAME
1	Establishing new governance protocols and project management standards may invoke resistance, and will need to be compatible with other campus standards
2	Institutional data is managed by many different groups on campus, in a very heterogeneous environment, with tight resource constraints. Data governance is highly needed, but resources to implement it will be limited.
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PROJECT MILESTONES & DELIVERABLES
(List the major milestones and deliverables of the project.)

MILESTONE	DELIVERABLES	DATE
Assessment of current practices (governance & PM)	Assessment	3 months
Design and implement new practices	Design document and approval artifacts (proposal form, scorecard)	6 months
Delivery on OE EDW projects	See specific project plans	See specific plans

IMPACT STATEMENT
(List the impact this project may have on existing systems and populations.)

POTENTIAL IMPACT	WHAT AND WHO IS IMPACTED	RATING (1-5) 1:Low |3: Med | 5: High
Program management for EDW projects and IDMG initiatives	EDW project teams will be more empowered to succeed as they have additional assistance and coordination. Input from a new source will require adjustments from existing staff. End users will receive data, reports, training and support that is more timely and aligned with campus needs. Campus staff will be more aware of IDMG goals and initiatives. They will have more opportunities for training and symposiums as well as online sources to learn skills around data usage and presentation.	4
New governance process put in place	EDW team will have a different role in developing and evaluating proposals, communications during projects, and post project evaluations. Project Coordinating Committee will need to devote time and adapt to new role, including thinking more broadly about enterprise needs; IDC will have greater visibility and ability to influence EDW priorities. Potential EDW system clients will need to adapt to a proposal process, including the potential for their project to be rejected or postponed. EDW users should see more of the information assets they most need appear in the EDW and have a better sense that	3

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	their needs are being addressed	

FINANCE DESCRIPTION
(Provide a high level narrative overview on the estimated investment requirements, the savings targets, and the ongoing funding model.)

Savings from this position will result from faster, more efficient and accurate implementations of EDW projects; from consequent reduction in shadow systems, and better decision making. Specific savings will be listed and tracked by the EDW projects.

RISKS
(Identify the high-level project risks and the strategies to mitigate them.)

RISK	MITIGATION STRATEGY
The volume of proposed EDW Projects will require a large ramp-up from existing levels for execution and support	Explore outsourcing strategies; Use governance structure to focus on most important projects

COMMUNICATION
(Highlight the communication requirements between the Sponsor, the Key Stakeholders and the Project Team, including the frequency of check-ins, project reviews, and status reports (in person and written).)

Regular meetings with the Director of Office of Planning and Analysis, Director of EDW team, and with the chair of the IDC will be established. Written status updates will be provided monthly. IDMG initiatives and their progress will also be posted on the web.

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APPENDIX A - PROJECT ROLES & RESPONSIBILITIES

Name the members of the project team.

PROJECT SPONSOR: Provides overall direction, guidance, and funding for the project. **RESPONSIBILITIES** include setting the vision and strategic direction, approving the project charter and plan; securing resources for the project; confirming the project's goals and objectives; keeping abreast of major project activities; making decisions on escalated issues; and assisting in the resolution of roadblocks.	
NAME	**Erin Gore**
NAME	

FUNCTIONAL OWNER: Manages the impact of the project in their functional area. **RESPONSIBILITIES** include ensuring agreed-upon project tasks and deliverables are completed, incorporating the views of their customers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met.	
NAME	**Pamela Brown**
NAME	**Karen Kato**
NAME	

PROJECT MANAGER: Leads the team in planning and implementing the project from initiation to closure. **RESPONSIBILITIES** include scope and change management, keeping the project plan current (deliverables, schedule, and resources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams.	
NAME	**Josh Blatt**
NAME	

The **PROJECT STEERING COMMITTEE** includes key stakeholders and subject matter experts. **RESPONSIBILITIES** include providing guidance on key issues.	
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A **SUBJECT MATTER EXPERT (SME)** provides expertise on project elements including business process and current or new technical solutions. **RESPONSIBILITIES** include maintaining up-to-date experience and knowledge on the subject matter, validating recommendations, and providing advice on what is critical to the performance of a project task.	
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Describe the roles and responsibilities of the project participants.

PROJECT TEAM MEMBERS **RESPONSIBILITIES** include • understanding the work to be completed, completing the research, data gathering, analysis, and documentation, • informing the project manager and team members of issues, scope changes, risks, and quality concerns, and • proactively communicate status and manage expectations.		
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APPENDIX B - KEY TERMS & DEFINITIONS FOR THIS PROJECT CHARTER

Define key terms unique to this Project Charter.