Task Instructions

Task ID: 500
Task Name: *Create Agency Specific Project Charter*
Task Start Date: *October 2, 2023*
Task Due Date: *December 15, 2023*

Task Description

Create or update an agency-specific Florida PALM Project Charter identifying your agency's objectives, scope, stakeholders, and responsibilities.

Task Overview

Florida PALM is a statewide business transformation that requires each state agency to plan and execute activities necessary to ready their people, processes, technology, and data for implementation. For a transformation of this magnitude to be successful, agencies must adopt project management techniques, strategies, and methodologies that make sense for their organization. Managing activities necessary to implement Florida PALM as a project within your agency will help you be successful.

This task initiates a series of project management tasks that allow your agency to address the critical components of project planning.

- ➢ **500 – Create Agency Specific Project Charter**
- ➢ 501 – Create Agency Specific Implementation Schedule (Releasing 10/09/2023)
- ➢ 502 – Create Agency Specific Risks and Issues Management Plan (Releasing 10/09/2023)
- ➢ 503 – Create Workforce Readiness Plan (Releasing 10/16/2023)

A project charter is typically one of the first steps in project planning. It is a formal document that outlines the fundamental aspects of a project. It serves as a foundational reference point that defines the project's scope, objectives, stakeholders, resources, risks, and high-level timeline.

Elements of a Project Charter

The project charter is essential for providing a clear and common understanding of the initiative's purpose and direction among all stakeholders, including team members and management. A project charter provides a clear understanding of the project's purpose and serves as a reference throughout the project's lifecycle. Among others, it ensures that all stakeholders are on the same page, establishes project authority, and provides a clear framework for planning and managing the project from start to finish.

Your agency may have a standard project charter format or template that may be used for this task. Florida Digital Service provides a variety of project management resources including a long and short Project Charter template (linked below in the Supporting Materials). Independent of the template or format used, a project charter should include such elements as:

- ➢ Project Title and Description
  - Provide a clear and concise project title that reflects the project's purpose.
  - Include a brief overview of the project, explaining why the project is necessary, its goals and intended outcomes.
- ➢ Project Objectives
  - Clearly define the project's main objectives.
  - Provide clear and concise objective statements that will guide the results of the project.
  - Objectives should be specific, measurable, achievable within your project scope, realistic within the project resources and time-bound to the project timeline.
- ➢ Scope
  - Provide a detailed explanation of what is included and excluded from the project's boundaries.
  - Define any internal deliverables, major tasks, and activities that need to be completed to achieve the project objectives.
- ➢ Project Team and Key Stakeholders
  - Identify any major project stakeholders. This may include agency leadership and decision makers, subject matter experts, agency influencers, end users, external resources and any other relevant parties that may have interest and can influence the success of the project.
  - List the Change Champion Network (CCN) members of the project team, along with their roles and responsibilities.
  - Include project governance to identify project related oversight and decision-making authority.
- ➢ High-Level Project Timeline
  - Provide a projected timeline for the project, as well as any major milestones and deadlines.
  - Reference the [Readiness Workplan](#), [Agency Implementation Roadmap](#) and the [Agency Implementation Timeline and Agency Activities](#) when developing your agency-specific timeline.
    - o *Note: Agencies will develop a more detailed agency-specific implementation schedule in future RW task 501.*
- ➢ Approval and Sign-off
  - Include a section where the project charter can be officially approved and signed by key stakeholders and sponsors.
  - Provide space for their signatures and the date of approval.
- ➢ Review and Updates
  - State how the project charter will be reviewed and updated, if necessary, throughout the project lifecycle.
- ➢ Appendices
  - Attach any relevant supporting documents, such as project schedules, resource allocation plans or organizational charts.

How will Florida PALM use the Project Charter?

Florida PALM Use: Informational

This and your agency's other project management tools (e.g., implementation schedule, risk and issue management plan) are critical resources for your agency's readiness for Florida PALM. Uploading your completed documents to your Readiness Workplan Task Tracker will allow the Florida PALM Project team access to the information to gain insights into your agency's unique planning or project management efforts, and to identify trends across agencies. Collectively the readiness tasks provide the Florida PALM Project team insights that allows us to better assist each agency.

How will agencies use their Project Charter?

Creating the project charter is an essential step in project initiation, as it helps the agency to align stakeholders' expectations, clarify project goals, and provide a reference document for decision-making throughout the project lifecycle.

Agencies will use their project charter as a guiding document for other project planning activities including the development of the agency-specific implementation timeline (RW task 501), risk and issues management plan (RW task 502) and workforce readiness plan (RW task 503). Additionally, agencies are encouraged to use the project charter to build awareness within their agency and among key stakeholders. Project charters should be posted to internal agency websites used to share project information.

Task Instructions

Draft or update your agency-specific project charter through collaboration with key stakeholders and your agency CCN using the elements described above and supporting resources provided below. Track progress in your Readiness Workplan Task Tracker. Upon completion, have the project charter officially approved and signed by your Agency Sponsor and key stakeholders. In the Readiness Workplan Task Tracker, submit your project charter by attaching the document(s) using the paperclip in the corresponding row, RW500 Create Agency Specific Project Charter. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%.

Instructions
1) *Collaborate with your Change Champion Network, Agency Sponsor, and key stakeholders to draft or update a project charter.*
2) *Track and record task progress in the Readiness Workplan Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.*
3) *Have the completed project charter officially approved and signed by key stakeholders and Agency Sponsors.*
4) *Submit project charter by attaching to the row of the task in the Readiness Workplan Task Tracker.*
5) *Update the Readiness Workplan Task Tracker, Agency Reported Task Progress column, to 100% and save.*
6) *If you have questions, review the Task Talk recording or contact your Readiness Coordinator.*

Supporting Materials and Resources:

- *Readiness Workplan*
- *Agency Implementation Roadmap*
- *Florida PALM Agency Exchange Library page*
- *Florida PALM Project Management page*
- *Florida Digital Services - Project Charter Resources*