

RFP to Contract Project Charter

Instructions

Use the RFP to Contract Project Charter to establish a clear project plan, decision rights, project scope and executive sponsorship for the procurement project.

Customize this template accordingly. Delete the informational guide text provided and fill in the blanks with information that is directly related to the RFP or contract.

Effective Date:	
Document Owner:	
Version:	
Version Date Revision / Description / Author:	
Approval:	
Approver Title:	
Approval Date:	

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1: Project Overview

Project Title	
Project Sponsor	Identify the main Division/Bureau/Client for which the project will be undertaken
Project Timeline	Enter the estimated time from start of project to completion of contract requirements. Describe specific timelines for more specific tasks in Section <u>3</u> , Project Tasks and Schedule
Project Manager	Identify the Procurement manager who will be responsible for managing the various tasks and phases through to contract execution. Identify also the Project Manager who will be responsible for completing the project after contract, if different from the Procurement Manager.
Project Team	Identify core team members who will be responsible for specific categories of responsibilities and reporting (e.g., IT, User agency, etc.)
Project Stakeholders	Identify (high-level) divisions/bureaus/committees who will be participating in the project. Describe specific roles, responsibilities and decision matrix in Section <u>5</u> , Project Team and Organization. What persons, departments, committees need to be involved in or support this project? Who are those outside of the project who have an interest in the project? Who will be affected by the project? Who will be affected if the project is not undertaken? Project Transition. Identify the PMs who will be responsible after the contract is awarded. Who will be responsible for day to day management, approval, sign-off of contractor activities? Who will be responsible for (software) implementation?

2: Project Description

Situation/Problem/ Opportunity	Briefly describe the problem or opportunity. This statement provides the basis for the rest of the document. Write this in terms of the organizational problem discovered, not in terms of the solution needed.
Benefits	What are the strategic returns from this investment – cost reduction, productivity, efficiencies, organizational goals met, etc.? What is the impact if the project is not undertaken?
Background	Provide context for the project that will allow participants to understand the project goal from the same reference points.
Purpose (Goal) Statement	State one goal that gives purpose and direction to the project. This is the broader direction that will be used as a continual point of reference for any questions that arise regarding scope or purpose. This is what you intend to do to address the problem or opportunity identified above. This is the solution you propose. Summarize what will be implemented, corrected, installed, replaced or otherwise addressed to solve the problem. This section should be written in language that is easy for everyone to understand.

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Objectives	Objectives are a more detailed version of the purpose (goal) statement. They outline what will be accomplished in this project.
Deliverables	Deliverables are tangible and/or measurable things that the project will produce to enable the objectives to be achieved. These may also be called "outputs" or "products". When all deliverables are complete, the goal is met. Objective statements will clarify the boundaries of the purpose statement and scope of the project. These should be written in clear, specific, tangible and measurable terms.
Project Scope - Out of scope	<p>List items that may be related but will not be part of the project. This is a critical section for any project, as it will allow you defend your scope throughout the course of the work and decline requests to work on items that are clearly defined as "out of scope".</p> <p>Consider listing items such as:</p> <ul style="list-style-type: none"> • Not within the control of the project team or project sponsor – "There is nothing we can do about it." • Better off as separate, "follow-up" projects – "We will know more about how to define and scope that work after this project is complete." • Going to be handled by a separate group or team – "We have dependencies or intersections, but another team will take this on."
Key Success Criteria	<p>This is the <u>measurable</u> business value resulting from doing this project</p> <p>What state must exist for the client to say that the project was as a success?</p> <p>Address quantitative and tangible business benefits in terms of what will be improved, what problems will be reduced or what benefit will this be to the organization.</p>

3: Project Tasks and Schedule

Task	Start	Finish	Comment
Develop RFP			
Develop Specifications, Scope of Work, Technical Requirements, Functional Requirements, Security Requirements			
Develop Evaluation Criteria, Weights, Benchmarks, Process			
Develop Contract Requirements			
Legal Review			
Publish RFP			
Evaluation Period			
Demonstrations/Interviews, if required			
Negotiations, BAFO			
Notice of Intent to Award			
Finalize Contract			
Contract begins			

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4: Risk Management Plan

Risks and Dependencies:

- Identify any factors that can affect the outcome of the project including major dependencies on other events or actions.
- These factors can affect deliverables, success, and completion of the project.
- Record anything that can go wrong during this project and the probability of such occurrence.
- Define how risks will be identified and the process of escalation. Identify the expected risks to which the project will be exposed. Assess the likelihood of each risk occurring (probability) and its impact on the project. Outline a plan for managing the risks. Include risk-minimization measures and contingency plans for recovery and damage limitation. Rate each risk probability and impact as **H**(igh), **M**(edium), **L**(ow).

Risk Factor	Probability High/Medium/Low	Impact High/Medium/Low	Mitigation Strategy

5: Project Team and Organization

List names, roles, responsibilities and anticipated time commitment/level or start/end dates of participation People.

- Identify any and all appropriate project staff, project lead, technical lead, functional lead, subject matter experts. Teams: Establish the core team, the executive sponsor team, stakeholders, participants and those impacted. Other Expertise: Identify software, hardware, internal/external dependencies, and resources
- Responsibilities. Describe specific roles and responsibilities and interaction with other teams/individuals
- Time: Establish the project timeline and time commitment or start/end dates of participation for all involved.

Include as appropriate, the project governance.

- To whom does the PM report?
- What group or individuals make recommendations?
- Who makes the final decisions for the project?
- Define a decision escalation process.

Name	Role	Responsibilities	Time
	Executive Sponsor	<ul style="list-style-type: none"> • Serve as ultimate authority, decision maker and advisor for the project • Approve changes to Scope • Identify and secure funding 	

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	Project Sponsor	<ul style="list-style-type: none"> • Make business/approach decisions for the project • Participate in key activities • Make resources available • Approve work products, address issues and approve change requests 	
	Project Manager	<ul style="list-style-type: none"> • Report to and receive direction to sponsors • Manage, review and prioritize work plans • Provide status reports • Manage project team • Recommend changes, escalate issues and mitigate risks 	
	Development Team	<ul style="list-style-type: none"> • Develop RFP/Contract Requirements • Determine Evaluation Criteria • Develop Scope of Work (SOW) • Develop Functional/Technical Requirements 	
	Subject Matter Experts (SME)	<ul style="list-style-type: none"> • Provide technical consulting • Help develop requirements • May help in evaluation of proposals 	
	Consultations/ Resources	<ul style="list-style-type: none"> • Identify others who could provide valuable insight into the process, i.e., other entities that have purchased the product 	
	Evaluation Team	<ul style="list-style-type: none"> • Identify those who would participate in the evaluation of proposals 	
	Transition Team	<ul style="list-style-type: none"> • Identify who would be responsible for implementing and managing the resulting contract 	