**Principles of Execution Portfolio Management Templates**

**Portfolio Charter**

**[PROJECT NAME]**

This document is used to define the parameters of the portfolio charter and to facilitate the implementation of the Portfolio Management Office.

Table of Contents

[Table of Contents 1](#_Toc386115666)

[1 General 2](#_Toc386115667)

[1.1 Submission Date 2](#_Toc386115668)

[1.2 Project Name 2](#_Toc386115669)

[1.3 Firm Department 2](#_Toc386115670)

[1.4 Business Priority [H,M,L] 2](#_Toc386115671)

[1.5 Budget UDF Code (if applicable) 2](#_Toc386115672)

[2 Project Roles 2](#_Toc386115673)

[2.1 Business Owner 2](#_Toc386115674)

[2.2 Executive Sponsor 2](#_Toc386115675)

[2.3 Project Presenter 2](#_Toc386115676)

[2.4 IS Project Manager 2](#_Toc386115677)

[3 Project Definition 2](#_Toc386115678)

[3.1 Description how the Portfolio will deliver value 2](#_Toc386115679)

[3.2 Portfolio Objectives 2](#_Toc386115680)

[3.3 Justification 2](#_Toc386115681)

[3.4 Key Stakeholders and Stakeholder Expectation 2](#_Toc386115682)

[3.5 Roles and Responsibilities 2](#_Toc386115683)

[4 Planning 2](#_Toc386115684)

[4.1 High Level Timeline and Milestones 2](#_Toc386115685)

[4.2 Portfolio Benefits 2](#_Toc386115686)

[4.3 Critical Success Criteria 3](#_Toc386115687)

[4.4 Assumptions, Constraints, Dependency and Risks 3](#_Toc386115688)

[5 Portfolio Implementation Cost and Project Resources 3](#_Toc386115689)

[6 Approvals 3](#_Toc386115690)

[6.1 Chief Information Officer 3](#_Toc386115691)

[6.2 Manager - Director 3](#_Toc386115692)

[6.3 Business Owner 3](#_Toc386115693)

[6.4 Executive Sponsor 3](#_Toc386115694)

|  |
| --- |
| General |
| Submission Date |  |
| Project Name |  |
| Firm Department |  |
| Business Priority [H,M,L] |  |
| Budget UDF Code (if applicable) |  |

|  |
| --- |
| Project Roles |
| Business Owner |  |
| Executive Sponsor |  |
| Project Presenter |  |
| IS Project Manager |  |

|  |
| --- |
| Project Definition |
| Description how the Portfolio will deliver value |
| In less than one page, summarize the portfolio value. |
| Portfolio Objectives  |
| In less than one page, summarize the portfolio objectives for the project. Consider what will indicate that the project has been successful. |
| Justification |
| Summary description of why a Portfolio Office is being established. |
| Key Stakeholders and Stakeholder Expectation |
| Summary description of the key stakeholders and their expectations for the portfolio. |
| Roles and Responsibilities |
| Summary description of roles and responsibilities. |

|  |
| --- |
| Planning |
| High Level Timeline and Milestones |
| Provide a summary of the key activities and / or phases to be performed on this project. |
| **Milestone Date** | **Milestone Description** |
|  |  |
|  |  |
|  |  |
| Portfolio Benefits |
| Summarize the hard, soft and strategic benefits for the Portfolio Office.  |
| Critical Success Criteria |
| Record critical success criteria.   |
| Assumptions, Constraints, Dependency and Risks |
| Identify critical assumptions, constraints, dependency and risks to be managed.  |

|  |
| --- |
| Portfolio Implementation Cost and Project Resources |
| **Note: all external costs should include related costs such as tax and shipping. Please see the IT Business Services with questions related to tax amounts or calculations.***Note the worksheet above is an embedded Excel spreadsheet. The sheet is protected to avoid accidental corruption, but if you do need to change the format, there is no protection password.* |

|  |
| --- |
| Approvals |
| Chief Information Officer | Signature Date |
| Manager - Director | Signature Date |
| Business Owner | Signature Date |
| Executive Sponsor | Signature Date |