**OE PROJECT CHARTER TEMPLATE**

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| --- | --- |
| **PROJECT NAME:** | BearBuy Implementation |
| **PREPARED BY:** | Vanessa Wong and Jon Conhaim |
| **DATE (MM/DD/YYYY):** | 07/23/2011 |
|  |  |  |
| **PROJECT CHARTER VERSION HISTORY** |
| **VERSION** | **DATE** |  | **COMMENTS (DRAFT, SIGNED, REVISED – CURRENT STATUS)** |
|  | **(MM/DD/YYYY)** |  |  |
| 1.0 | 11/10/2010 |  | Vanessa Wong- Initial Creation |
| 2.0 | 6/28/2011 |  | Vanessa Wong- Version 2 Organization |
| 3.0a | 07/23/2011 |  | Jon Conhaim - Version for UC Berkeley OE Program Office |
| (UCB) |  |  |  |
| 3.0b | 11/03/2011 |  | Mindy McDaniels – proofed/edited |



**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.)*

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| --- | --- | --- | --- | --- |
| **PROJECT SPONSOR(S) NAME** |  | **SIGNATURE** |  | **DATE** |

**CASE FOR CHANGE**

*(What is the Current Situation?)*

BearBuy is an essential enabler of our overall procurement vision which is to reduce the time and money that departments currently spend on procuring goods and services, so that academic units may devote more time and money to research and teaching and non-academic units can more efficiently and economically support our academic activities.

In conjunction with our collaboration with UCSF, BearBuy provides the infrastructure needed to help realize the benefits of the strategic sourcing efforts (e.g., OE efforts around MRO, Life Sciences, catering, IT, food and beverage, which are now transitioning to the sourcing and procurement line organization).

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The key problems that BearBuy is targeting are:

* End users currently spend too much time and effort procuring goods and services with current procurement systems infrastructure and processes.
* Substantial spend occurs outside the system, going to non-preferred vendors and/or at higher than negotiated pricing resulting in substantial lost savings.
* Substantial central resources (AP, Purchasing) are expended supporting the current systems and in working around its limitations (e.g., workarounds, convoluted data sets for analytics).

**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?)*

* Provide a simplified and streamlined procure-to-pay process.
* Add value to campus community with an easy to use online buying approach.
* Achieve cost efficiency and operational excellence by creating a regional center of procurement excellence through joint implementation between UCB and UCSF.
* Eliminate maverick spend and drive compliance in purchases with negotiated contract vendors.
* Improve operation efficiency within departments, Campus Purchasing and Accounts Payable.

**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. Improve user satisfaction with the purchasing process to an average rating of *Satisfactory*.
2. Reduce the purchase of goods and services from higher-price vendors by 50%
3. Increase the purchase of goods and services through strategic contracts by 80%
4. Increase the use the of *BearBuy* system so 75% of all transactions are processed by it.
5. The project will design proposed revisions to policy and business processes needed to achieve these metrics.

**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.)*

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* Implement software modules listed in 4.1, including configuration and integration
* Facilitate focus group sessions
* Suppliers’ catalogs enabled and ready for shopping
* Integration points
* Major project milestones

**PROJECT CONSTRAINTS & ASSUMPTIONS**

*(List the known and anticipated constraints, and the initial assumptions for the project.)*

* NAME
1. All services contained in the SciQuest SOW will be implemented in a single project phase
2. SciQuest resources supply adequate resources to successfully implement all modules in scope.
3. Web Browsers are compatible for the SciQuest application.
4. Network is effectively managed to optimize performance for all users at both UCSF and UCB.
5. The role of Supplier Enablement Lead is filled by someone who is knowledgeable in UCSF or UCB supplier base, spend behaviors, and contract status.
6. There is adequate resource for business process documentation, workflow, communication and change management.
7. The role of business process owner is filled by someone who has knowledge of the institution’s procurement patterns to develop testing scenarios and workflow scenarios.
8. Reports and extracts from most history and transactional data will all be available and downloadable from BearBuy application.

**PROJECT MILESTONES & DELIVERABLES**

*(List the major milestones and deliverables of the project.)*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | MILESTONE |  | DELIVERABLES |  | DATE |
|  | SciQuest Sprint Plan Complete |  |  |  | 11/5/2010 |
|  | SciQuest Project kickoff meeting |  |  |  | 11/29/2010 |
|  | Project Charter |  |  |  | 11/20/2010 |
|  | Integrated Detailed Workplan Complete (Huron) |  |  | 11/19/2010 |
|  | Project Initiation Phase Complete |  |  |  | 11/30/2011 |
|  | Configure UIT Site |  |  |  | 11/12/2010 |
|  | Configuration & Integration Workshop |  |  |  | 11/29/2010 |
|  | Initial Solution Specifications |  |  |  | 01/06/2011 |
|  | Conduct Prototyping Sessions I, II , III |  |  |  | 1/20/2011, 2/24/2011, |
|  |  |  |  |  | 06/15/2011 |
|  | Conduct Customer Focus Group I, II |  |  |  | 04/19/ 2011, |
|  |  |  |  |  | 07/24/2011 |
|  | Final Solution Specifications |  |  |  | 07/15/ 2011 |
|  | Final Change Management Plan |  |  |  | 07/29/2011 |
|  | Solution Specification Phase Complete |  |  |  | 07/15/2011 |
|  | Create UAT Test Plans |  |  |  | 8/01/2011 |
|  | Build Training and Production sites |  |  |  | 8/12/2011 |
|  | Develop User Authentication Integration |  |  | 08/19/2011 |
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|  | Develop User Profile Integration |  | 08/19/2011 |
|  | Develop Supplier Integration |  | 08/19/2011 |
|  | Develop Purchase Order Integration |  | 08/19/2011 |
|  | Test Integration Points |  | 09/02/2011 |
|  | Solution Build Phase Complete |  | 09/02/2011 |
|  | System Integration Testing |  | 10/07/2011 |
|  | UAT Training Completed |  | 10/07/2011 |
|  | User Acceptance Testing Completed |  | 11/02/2011 |
|  | Solution Build Frozen and Solution Acceptance |  | 11/03/2011 |
|  | Cutover Plan for Production Complete |  | 11/03/2011 |
|  | Production Preparation Complete |  | 11/10/2011 |
|  | Live Order Testing |  | 11/14/2011 |
|  | Production Training for Cohort 1 Complete |  | 01/20/2012 |
|  | Cohort 1 Goes Into Production |  | 01/23/2012 |
|  | Cohort 2 Goes Into Production |  | 02/21/2012 |
|  | Cohort 3 Goes Into Production |  | 03/19/2012 |
|  | Cohort 4 Goes Into Production |  | 04/23/2012 |
|  | Cohort 5 Goes Into Production |  | 05/21/2012 |
|  |  |  |  |
|  | **Major Milestones for Supplier Enablement :Deliverable/Milestones** |  | **Completion** |
|  |  |  |  | **Date** |
|  | Supplier Enablement Kickoff Meeting |  | 05/16/2011 |
|  |  |  |  |
|  | Finalize file format/determine mandatory fields & evaluate implication |  | 07/15/2011 |
|  |  |  |  |
|  | Test XML with SciQuest complete |  | 12/31/2011 |
|  |  |  |  |
|  | Complete Supplier Enablement for all vendors that will be available at the launch of Cohort 1 |  | 12/31/2011 |
|  |  |  |  |  |

**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 |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**FINANCE DESCRIPTION**

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

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**RISKS**

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

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|  | RISK | MITIGATION STRATEGY |
|  | ***User Acceptance*** | **Mitigation Strategy** |
|  | ***It may be difficult to deliver a product that will be*** |  |
|  | ***acceptable to everyone*** | • Role-based focus group design meetings with cross - |
|  |  | sections users will enable delivery of a product users want |
|  |  | • Release early design documentation or demo to familiarize |
|  |  | the user community with the application |
|  |  | • Actively solicit feedback and suggestions to ensure we |
|  |  | account for all aspects of problems in the current UCSF |
|  |  | P2P system and UC Berkeley’s BFS and SciQuest sandwich |
|  |  | model systems. |
|  |  | • Evaluate the pros and cons of each major design decision. |
|  |  | • Focus on creating a system that is |
|  |  | • Create application labels that are clearly understood |
|  |  | • Make search function robust with helpful flags for buying |
|  |  | decision |
|  |  | • Allow flexibility in workflow configuration that is practical |
|  |  | and efficient |
|  |  |  |
|  | ***Legacy Application Support*** | **Mitigation Strategy** |
|  | Over 100,000 POs were generated in PeopleSoft. | • Ensure reports are available to help user manage existing |
|  | Import of POs from the legacy system is | POs in PeopleSoft |
|  | impractical and out of scope. Existing P2P users | • Provide a clear alternative approach and procedure to |
|  | may have POs that are still open for longer period | manage POs that require change orders. |
|  | than the SciQuest Order Management rollout. |  |
|  |  |  |
|  | ***Inter-campus Coordination*** | **Mitigation Strategy** |
|  | With UCSF and UCB jointly implementing SciQuest | • Build an effective, integrated work plan leveraging |
|  | with varying stages in current application, the | expertise from Huron and SciQuest consultants |
|  | project coordination must be seamless. | • Conduct clear, frequent communication amongst core |
|  |  | project team members between UCSF and UCB |
|  |  | • Create and use a governance structure that is clearly |
|  |  | defined to avoid any confusion that may cause delay and |
|  |  | stakeholder dissatisfaction. |
|  |  |  |

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**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).)*

***System Performance Concerns***

None have been identified at this time. UC Berkeley will conduct load testing of the

BFS functionality that will be used with the UCB BearBuy system. The SciQuest contract prohibits load testing of the SciQuest systems.

***Security Concerns***

UC Berkeley is consulting with the campus Chief Security Officer, Ann Geyer, and her staff to evaluate the security of the BearBuy system.

**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 forthe 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** | Ron Coley |
| **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 theircustomers, providing functional expertise in a particular area, articulating requirements, and working to ensure that business needs are met.

**NAME** Jim Hine

**NAME**

**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, andresources), issue and risk management, maintaining project documents, reporting project status, and facilitating conflict resolutions within the project and between cross-functional teams..

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| --- | --- | --- | --- |
| **NAME** | Vanessa Wong |  |  |
|  |  |  |  |
| **NAME** | Jon Conhaim |  |  |
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The **PROJECT STEERING COMMITTEE** includes key stakeholders and subject matter experts.

**RESPONSIBILITIES** include providing guidance on key issues.

**NAME** Ron Coley (UCB)

**NAME** Jim Hine (UCB& UCSF)

**NAME** Frank Yeary (UCB)

**NAME** John Wilton (UCB)

**NAME** Andrew Szeri (UCB-OE)

**NAME** Eric Vermillion (UCSF)

**NAME** John Plotts (UCSF)

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.

**NAME**

**NAME**

**NAME**

**NAME**

**NAME**

**NAME**

*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.

|  |  |  |  |
| --- | --- | --- | --- |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |
| **NAME** |  | **ROLE** |  |

**APPENDIX B - KEY TERMS & DEFINITIONS FOR THIS PROJECT CHARTER**

*Define key terms unique to this Project Charter.*

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