

Project Charter

1.0 Project Identification

Name of Project:	4c1 Catalogue current agreements
Sponsor: (Accountable)	Pam Coulter
Project Manager: (Responsible)	Desirée van Dijk
Project Team Members: (Responsible or Consult)	Ashley Ford Jacklyn Iezzi Andy O'Leary Nicole Olmstead Lauren Stewart Kristen Van Alphen
Approved Budget:	N/A

2.0 Business Need

4c1 Review and catalogue the current agreements the City has entered into with various user groups – financial and operational.

Planned timing: Q1 2025 to Q3 2025

3.0 Project Objectives (Purpose)

Identify the operational and financial agreements that are in scope. For example, service agreements, lease agreements, partnerships and collaborations that require some type of action after approval (invoice, payment, and/or renewal).

4.0 Project Scope

1. Inventory financial and operational agreements in scope
2. Confirm the location of relevant agreements:
 - a. SHaRE (Corporate Information Site): Procurement, No-By-law, Purchase Orders, Simple, and Under By-law libraries
 - b. Bids & Tenders?
 - c. Elsewhere?
3. Determine metadata necessary for workflow such as:
 - a. Expiry date
 - b. Financial details and invoicing requirements
 - c. Lead staff for agreement

5.0 Stakeholders

Name	Consult or Inform
Service Review Ad Hoc Committee	I
Staff - in relevant departments (Admin and project leads)	C
Finance (invoicing)	C
Purchasing (insurance)	C
IT	C

6.0 High Level Deliverables / Milestone Dates

Item	Deliverables / Milestones	Dates
1.	In-scope agreement locations identified – financial and operational	Q1 2025
2.	Identify the metadata necessary for workflow	Q2 2025
3.	Determine how data will be stored	Q3 2025

7.0 Risks

Severity	Description	Mitigation Tactic
High	Lack of capacity to develop workflows	Upcoming meeting to discuss the priority of workflow
Medium	Agreements may be missed due to being stored in various locations	Consult with staff across the corporation
Medium	Staff changeover	Notifications to division email addresses rather than individual email addresses. Consider the use of a shared agreement calendar.

8.0 Key Results for Success (Must Be Measurable or Quantifiable)

All in-scope agreements identified
Location of in-scope agreements identified
Resulting in Efficiency savings