Project Information

**A1. Project Name**

*Assign each project a concise but unique name that captures the nature of the project and where it is taking place. Include a project number if applicable.*

**A2. Project Summary**

*Provide a basic outline of what the project will accomplish.*

**A3. Background**

*State the problem(s) that the project seeks to solve and explain how and why the project came about to solve them.*

**A4. Project Goals**

*Establish a prioritized list of goals and objectives for the project, ensuring that goals are specific, measurable, and realistic. This list should include not only the goals for the physical completion of the project but also the broader academic and institutional objectives the project seeks to advance. List the goals in order of priority; prioritizing the goals helps the Facilities team know where to make trade-offs if budget cuts or other obstacles arise.*

**A5. Project Scope**

*Describe what the project will include and define the limits of the project. Be sure to also flag anything the project will not address, for example, if a building renovation will not include IT upgrades.*

**A6. Master Plan Alignment**

*Explain how the proposed project aligns with the campus master plan.*

**A7. Strategic Plan Alignment**

*Explain how the proposed project aligns with the campus strategic plan.*

B. Project Participants and Communication Strategy

**B1. Lead Roles and Responsibilities**

*Identify the project manager and other decision makers who will be involved in project planning and execution. Describe each person’s project responsibilities.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Responsibility** | **Contact Information** |
| Project Manager |  | Manages the project from initiation to completion and oversees the project budget and schedule |  |
| Consultant |  | Creates the site plans and provides design and technical expertise throughout the project |  |
| General Contractor |  | Directly manages the actual construction process and oversees all subcontractors |  |
|  |  |  |  |

**B2. Approval and Oversight**

*List the individuals or groups that have approval or oversight authority over any part of the project and specify the scope of their authority.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Responsibility** | **Contact Information** |
| Project Sponsor |  | Approves strategic project decisions on behalf of academic or administrative unit |  |
|  |  |  |  |
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**B3. Customers**

*List the constituencies that will use the completed project. Identify one representative from each constituency who is willing and able to serve as a point of contact.*

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| --- | --- | --- |
| **Customer** | **Representative** | **Contact Information** |
|  |  |  |
|  |  |  |
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**B4. Interested Parties**

*List any other individuals or groups who have a vested interest in the project, even if they are not directly involved. Explain why they might be interested and include a point of contact for each group.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer** | **Representative** | **Contact Information** | **Reason** |
|  |  |  |  |
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**B5. Communication Strategy**

*Assign responsibility for communicating updates and points of contact for questions about different project components. This section can be used to elaborate on reporting relationships among participants to avoid ambiguity about who should be communicating with whom about updates and changes.*

C. Implementation Plan

**C1. Project Milestones**

*List major project milestones and target completion dates.*

|  |  |
| --- | --- |
| **Milestone** | **Target Completion Date** |
|  |  |
|  |  |
|  |  |

**C2. Project Timeline**

*Map out the project from start to finish, including both major milestones and smaller progress targets. Elaborate on what should be accomplished at each stage and include information about who is responsible for approval and completion of each phase.*

**C3. Funding Sources**

*List each funding source for the project and how much funding will come from each. If additional funding is necessary, list possible sources and plans for obtaining those funds.*

**C4. Budget**

*Include the project budget as an addendum to the charter.*

D. Considerations

**D1. Assumptions**

*List and describe any conditions on which the progress and ultimate success of the project depend. Where possible, outline a contingency plan.*

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| --- | --- |
| **Assumption** | **Contingency Plan** |
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**D2. Constraints**

*List and describe current or future challenges that could impede the successful completion of the project.*

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| --- | --- |
| **Constraint** | **Contingency Plan** |
|  |  |
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|  |  |

**D3. Campus Impact**

*Explain how the project will affect campus, both during construction and after completion. List all possible negative ramifications of the project and propose plans to minimize them.*

E. Approval

**Charter Approval**

*By signing the final page of the charter, all approval authorities and stakeholder groups agree to the   
charter’s contents.*

|  |  |  |
| --- | --- | --- |
| **Name** | **Signature** | **Date** |
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