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| --- |
| *A communication tool that outlines the scope and objectives in prioritized order, identifies the participants (their roles and responsibilities), documents challenges and assumptions, and delineates funding sources and operating budget impacts. This document accompanies the Capital Project Request and the Project Budget Worksheet. There will be overlap between the Capital Project Request and the Project Budget Worksheet. The primary audience for this document is the authoring institution itself with secondary audiences being other project team partners (i.e. UW System Administration, Division of Facilities Development, and design consultants).*  |

|  |  |  |
| --- | --- | --- |
| **Institution** |  | **Project Title** |
|  |  |
| X | X |

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| --- | --- |
| **01.** | **Project Background and Summary** |
|  |  |
|  | *Describe the basis for and/or the history of the project. Provide a basic summary of what the project will accomplish. Explain the project’s connection to the campus master and strategic plans.* |
|  |  |
|  | X |

|  |  |
| --- | --- |
| **02.** | **Goals and Objectives** |
|  |  |
|  | *Establish and list clear agreed-upon goals and objectives. They must be specific, measurable, achievable, and relevant to the institution’s strategic goals. Include a timeline. Prioritize the goals and objectives in order of importance. List elements or tasks that are outside the project scope.* |
|  |  |
|  | X |

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| **03.** | **Assumptions** |
|  |  |
|  | *Describe assumptions associated with the project that may include enabling or collateral projects, and/or specific resources, information, or funding. Describe how these assumptions affect the project’s goals, objectives, budget, and/or schedule.* |
|  |  |
|  | X |

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| **04.** | **Constraints and Challenges** |
|  |  |
|  | *Describe constraints or boundaries on the project including budget/funding limits, time constraints, regulatory impacts or desired quality standards. Identify challenges, obstacles, risks, or threats that might prevent successful attainment of project goals. Risks should by analyzed, quantified, and prioritized.* |
|  |  |
|  | X |

|  |  |
| --- | --- |
| **05.** | **Capital Funding** |
|  |  |
|  | *Identify cost estimates and spending restraints. Identify source of funds, department responsible for fund raising, budget approval milestones, type of funds, why the budget is set and whether there is enough information to provide an informed budget.* |
|  |  |
|  | X |

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| --- | --- |
| **06.** | **Operating Budget** |
|  |  |
|  | *Identify the estimated impact on the operating budget for the department or institution. Include staffing and energy cost implications as well as maintenance supply and expense impacts. Any project that is funded using segregated, housing, dining, or parking fees/rates must provide a schedule for the cost of the project over its lifetime (20 or 30 years, depending on the type of bonds).* |
|  |  |
|  | X |

|  |  |
| --- | --- |
| **07.** | **Project Milestones and Timeline** |
|  |  |
|  | *Provide project duration estimates and milestone dates. Include how the schedule was determined; the driving factors for the completion date; and whether there is enough information to provide a reliable schedule.* |
|  |  |
|  | X |

|  |  |  |
| --- | --- | --- |
| **Milestone Description** |  | **Target Completion Date** |
| Construction Start |  | MM/DD/YYYY |
| Substantial Completion/Occupancy |  | MM/DD/YYYY |
| X |  | MM/DD/YYYY |

|  |  |
| --- | --- |
| **08.** | **Key Stakeholders and Their Roles** |
|  |  |
|  | *Identify key decision makers (project executive), their functions, roles, and authority. Identify all project committees, their members, and scope of authority. Describe who is responsible for what type of communication about the project. Identify roles, responsibilities, and expectations for external partners and donors.* |

Lead Role and Responsibilities

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Responsibility** | **Contact Information** |
| X | X | X | X |
| X | X | X | X |
| X | X | X | X |

Approval and Oversight

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Authority** | **Contact Information** |
| X | X | X | X |
| X | X | X | X |

Customers and User Groups

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer/User Group** | **Representative** | **Reason** | **Contact Information** |
| X | X | X | X |
| X | X | X | X |

Interested Parties

|  |  |  |  |
| --- | --- | --- | --- |
| **Party Name** | **Representative** | **Reason** | **Contact Information** |
| X | X | X | X |
| X | X | X | X |

|  |  |
| --- | --- |
|  | **Communication Strategy** |
|  |  |
|  | X |

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| **09.** | **Approvals** |
|  |  |
|  | *All participants shall sign off on the charter, signaling their agreement to the defined parameters and process. At a minimum, the Provost, Vice Chancellor for Finance and Administration,* ***or*** *Chancellor needs to be a signatory to the charter.* |
|  |  |
|  | X |

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

|  |  |
| --- | --- |
| **10.** | **Revisions and Version History** |
|  |  |
|  | *At a minimum, the Provost, Vice Chancellor for Finance and Administration,* ***or*** *Chancellor needs to be a signatory to the revisions.* |
|  |  |
|  | X |

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Approved by** | **Revision Description and Reason** |
|  |  |  |  |
| 1.0 | MM/DD/YYYY | [INSERT NAME and INITIALS HERE] | [INSERT NARRATIVE HERE] |
|  |  |  |  |
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