# Background & Purpose:

Provide a context that should be considered and understood by those engaged in or inquiring about the project. If the project involves a “case for change,” then it is likely that it can be a direct substitute for the “purpose.” A “case for change” is a statement of the facts and opportunities that exist at the university, resulting in a compelling argument that demands change, so that the university is improved.

Example – The project originated in the university master plan. The overall purpose of this project is to increase the utilization of the widget machine center by 5%.

# Core Theme & Strategic Plan Linkage:

Indicate how the project is connected to the institution’s core themes and strategic plan.

Example – This project is linked to Core Theme 1, Objective 2, Indicator 1, Measure 1 (CT1.2.1.1) and Strategic Plan Goal 2, Objective 1, KPI 1 (SP2.1.1).

# Objectives:

Address triple constraints – schedule, cost and performance. In the schedule, identify if the project is intended to be on-going/perpetual. In the costs, identify if permanent funds are included or only one time.

Example – First, and most important, is that this effort will cost less than $500k. Second, it will be complete in one calendar year. Third, minimize the impact on quality due to the use of used equipment.

# Work Definition:

This is a statement defining how the work is to be completed. Alternatively, consider a work breakdown structure (WBS), which is an outline of the anticipated activity and/or tasks required to produce the deliverables.

Example – Who will perform project and construction management and who will supply detailed design, engineering, and procurement. Contractors will be selected and commissioned to perform the mechanical and electrical installation.

Identify Team Members and responsibilities.

# Deliverables/End Products:

How much, how complete and what condition?

Example –

1. Approximately 20 detailed engineering drawings
2. Provide project management for the duration of the project
3. Provide construction management beginning with the mobilization of the electrical contractor and ending at start up
4. Complete system modification, which fulfills the requirements of start-up

# Key Milestones:

Definition, completion date, completion criteria

Example –

1. Complete feasibility stage by February xx, yyyy
2. Complete development stage by March xx, yyyy
3. Complete the execution stage by December xx, yyyy
4. Start-up begins on December xx, yyyy
5. Meeting stated project objectives by April xx, yyyy

# Constraints:

Example –

1. Cash may not be available early enough
2. There are a limited number of contractors available
3. Successful installation hinges on teamwork between contractors

# Key Assumptions:

Example –

1. The start-up curve is defined as 50% of the budget production for the first two weeks
2. The project will not be adversely affected by winter weather or the holiday season

# Specifically Excluded Scope:

Example –

1. Anything to be specifically excluded from the scope of work

Sponsor Date

Leader Date