|  |  |
| --- | --- |
| **Opportunity** | |
| Describe the opportunity to address a need by way of the project. Include any pre-existing conditions that enhance the opportunity such as available land, an interested funder etc. | |
|  |
| **Goal** | |  |
| Describe the goal of the project or the project phase. | |  |
| **Objectives** | |  |
| * List the key objectives or deliverables that the project or project phase will achieve. | |  |
|  |
|  |
|  |
|  |
| **In Scope** | **Business Case** |  |
| * + List the expected areas of work focus. It may be helpful mention what is not included so that anyone reading the charter knows what is not part of this project or phase. | Describe the benefits of the project in terms of economic sustainability, ROE and/or other values....what we/our community gets out of this over the long term. Complete the sentence “if we do this, we will (attain/achieve/ benefit from/ increase our.. etc)…” |  |
|  |
|  |
|  |
|  |
|  |
| **Constraints** | **Assumptions** |  |
| * List serious limitations or obstacles to following through with the project. | List any pre-existing decision or assumptions. |  |
|  |
| **Deliverables** | |  |
| * List the final deliverable. | |  |

**PRELIMINARY PROJECT DEFINITION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Core Team** | | **Stakeholders** | |
| **Name** | **Role** | **Name** | **Role** |
| Names of people involved in decision making as the project proceeds. | Indicate the project related role (not the organization related role if these are different). | List all the individuals and organizations that are impacted can provide critical input. | Indicate project related role the stakeholder might have if any. |
|  |
|  |

**TEAM BREAKDOWN**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Status** | | | | |
| **Project Start Date** | Start date of project or project phase. | | | |
| **Estimated Completion** | Completion date of deliverable(s) – really try to put something here! | | | |
| **Process, Operations or Programs Impacted** |  |  |  |  |
| **Potential Financial Impact** | List costs | Eg: Surveys | Eg: Printing: | Eg: Fees |
| **Major Risks/Opportunities** | List risks Eg: Burnout | Eg: Sudden Funding Opportunity | Eg: Reaching consensus |  |

**SCHEDULE & RISK PLANNING**

**TARGETS AND MILESTONES**

|  |  |  |
| --- | --- | --- |
| **Milestones** | **Target Date** | **Status** |
| **First milestone** | Month, yr | Not started, Started, % Complete, Complete, etc. |
| **Second milestone** | Month, yr | Not started, Started, % Complete, Complete, etc. |
| **Third milestone** | Month, yr | Not started, Started, % Complete, Complete, etc. |
|  | Month, yr | Not started, Started, % Complete, Complete, etc. |
|  | Month, yr | Not started, Started, % Complete, Complete, etc. |
|  | Month, yr | Not started, Started, % Complete, Complete, etc. |
|  | Month, yr | Not started, Started, % Complete, Complete, etc. |
| **Penultimate Milestone** | Month, yr | Not started, Started, % Complete, Complete, etc. |
| **Final deliverable** | Month, yr | Not started, Started, % Complete, Complete, etc. |

**SPONSOR**

|  |  |
| --- | --- |
| **Sponsor Approval** | **Date** |
| The Sponsor is the individual who is the ultimate driver/approver. |  |