Scope Document Process
Purpose & method

- Facilitate improvement
- Standard set of components
- Requires thoughtful approach
- Supports transparency
Existing template – modifications

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 ongoing/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.
Expectations for use

• **Scope** should be finalized early in the process of project

• Addressing cost implications up front
  • Enables budget monitoring
  • Each scope should include maximum cost allowable – objective section

• Units impacted by the project should be included/involved
  • E.g. a project addressing/including software should involve IT

• Signature is required for both sponsor and leader

• If/when funding is needed **budget forms** should be completed
  • Linkage to original scope is required on form
  • Copies of finalized requests are provided to both sponsor and leader
  • Separate form for position related funding is provided

• Does not replace established external or internal approval processes
  • New programs (EPCC, HECC, NWCCU)
  • Annual budget process