



# 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 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.

_____	_____
Sponsor	Date
_____	_____
Leader	Date



# 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