# 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 College of Arts Humanities and Social Sciences. The overall purpose of this project is to increase entering freshman by 5% in the 2022-23 academic year.

# Strategic Plan Linkage:

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

Example – This project is linked to 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, increase yield by 2%.

# 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 the outreach and who will provide the financial projections and who will conduct the outcomes analysis.

Identify Team Members and responsibilities.

# Deliverables/End Products:

How much, how complete and what condition?

Example –

1. Scalable recruitment plan for the targeted audience
2. Provide project management for the duration of the project
3. Provide progress monitoring dashboard

# 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 August xx, yyyy
4. Meeting stated project objectives by September xx, yyyy

# Constraints:

Example –

1. Cash may not be available early enough
2. There are a limited number of internal resources
3. Successful completion is reliant upon interaction amongst multiple units

# Key Assumptions:

Example –

1. The project will result in a net positive impact on net tuition revenue

# Specifically Excluded Scope:

Example –

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

Sponsor Date

Leader Date