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## REVISIONS HISTORY

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<tr>
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PROJECT MANAGEMENT METHODOLOGY OVERVIEW

The Bridgewater State University Information Technology Division has developed a Project Management Methodology as a means of achieving a greater degree of success in its technology projects. The Project Management Methodology serves as a guide to the organization as it selects its projects, to project teams as they plan the work, to management as they supply the required oversight, and to Sponsors and Customers as they collaborate in the design and delivery. This methodology is designed to be consistent with the Project Management Institute’s Guide to Project Management Body of Knowledge (PMBOK).

The Information Technology Project Management Methodology is designed to provide an organization wide project management capability based on a common language, a practical set of skills, and a robust methodology, with appropriate support tools for maximizing productivity and effectiveness in completing projects successfully, on time, and within budget. The larger intention of this effort is to develop a standard for project management practices and procedures across all aspects of the institutional technology landscape. The Project Management Methodology includes documentation, templates, and other tools to assist the project managers and project teams in scoping, planning, and executing projects.

GOALS

This document describes in detail the process that Bridgewater State University Information Technology will use during the requesting, initiating, planning, execution, and closing phases of projects. In defining this methodology, we hope to reach the following goals:

• Provide a common point of reference and a common vocabulary for talking and writing about the practice of project management for projects within the IT Division.

• Increase the awareness and professionalism of good Project Management Practice by those charged with the responsibilities defined in the methodology.

• Define the roles of the Sponsor, IT Liaison, Project Manager, Stakeholders, Technical and Business Leads and other team members and obtain consensus within the organization about their importance as Critical Success Factors.

• Create the basis for a collaborative environment where everyone engaged in project work understands what is required of them and why those requirements are key factors for improving project results.
DEFINITION OF A PROJECT

A project is a temporary endeavor (it has a start and end date), undertaken to create a unique product, service or result within defined constraints. A project concludes when its specific tangible and/or intangible objectives have been attained and its resources have been released to do other work.

The BSU Information Technology Project Management Methodology defines a project as:

- A unique endeavor (not repeated)
- Temporary, with a distinct beginning and end
- Defined by specific deliverables
- Conducted by a temporary team that exists for its execution
- Having a project manager who is responsible for its success
- Defined by identifying its starting point, the goal / objectives sought, and the route between them

Operations are ongoing and repetitive. Operational activities may repeat daily, monthly, annually, or on an as-needed basis, e.g., financial review, standard upgrades, hiring for a new position. When operations require a major change in process, input/output, or purpose, they may become projects until the change is complete.

PROJECT TYPES

All Bridgewater State University Information Technology projects are categorized as either a Campus Strategic Project or an Operational Project based on the criteria described below.

Strategic Project:
Any work requested that meets two or more of the criteria below will be considered a Strategic Project:

- The work requested impacts more than one department
- The work requires institutional funds to be expended, excluding staff salaries
- The project has a large institutional impact
- The project implements new technologies and processes that promote transformative change resulting in an institutional competitive differentiation

Operational Project:
Any work requested that meets all of the criteria below will be considered an Operational Project:

- The work is in support of one department
- The work does not require that institutional funds be expended, excluding staff salaries
- The project does not have a large institutional impact
- The project will optimize performance and accommodate incremental growth and improvements
PROJECT LIFECYCLE OVERVIEW

The Project Management Lifecycle is used to describe a deliberate, structured, and methodical process for Project Management. The Project Management Life Cycle has five phases: Request, Initiation, Planning, Execution & Control, and Closure. This methodology contains the templates for the various project management activities undertaken to deliver successful projects. Each project phase addresses a specific aspect of the process of managing a project from initiate through close. Although these phases are described sequentially, in practice many of these phases may overlap or be applied concurrently during the lifetime of a project. Listed below is an overview of the five phases. Each phase will be described in greater detail in subsequent sections of this document.

Requesting

- Delivers a Project request.
- Captures specific project information that will aide in project evaluation.
- Approves the Project Request to advance to the Initiation Phase (or defers the request).
- Completed and Approved Project Requests constitute the Project Portfolio.

Initiation

- Delivers a Project Charter.
- Defines the preliminary project cost, scope, roles, and timeline.
- Formalizes the existence of the project.
- Approves the project to advance to the Planning Phase.

Planning

- Delivers a detailed Project Plan.
- Defines the detailed project schedule, budget, resources, and timeline.
- Provides the baseline to control and manage the project.
- Approves the project to begin work.

Execution & Control

- Creates and delivers the end product or service.
- Executes the tasks in the project plan (schedule).
- Delivers regular updates to stakeholders detailing progress.
- Relies on the plans from the Planning Phase to control the project.

Closing

- Concludes all project activities.
- Administratively closes the project.
- Turns the delivered product or service over to customer or a support group.
- Assesses project outcomes and team performance.
- Documents best practices and lessons learned.
- Celebrates project success.
PROJECT ROLES & RESPONSIBILITIES

A successful project requires the Project Team to participate (at some level) in the planning process, buy-in to the Project Plan, and be responsible for completion of assignments. It is important to have a defined formal structure for the project and for the project team. This provides each individual with a clear understanding of the authority given and responsibility necessary for the successful accomplishment of project activities. This section describes the typical roles and responsibilities for projects. Roles may be assigned to one or more individuals. Conversely, individuals may have one or more roles on a project.

Project Sponsor - The Project Sponsor is the executive (AVP or above) with a demonstrable interest in the outcome of the project and who is ultimately responsible for securing spending authority and resources for the project. The Project Sponsor will:

- Oversee high-level project progress.
- Provide input to development of Project Charter.
- Provide and approve project budget and resources.
- Champions the project to provide exposure and buy-in from senior management.
- Approve the project completion.

IT Liaison – The IT Liaison is a designee of an Area Vice-President who is authorized by that Vice-President to represent the Division in all Information Technology related matters including the submission of project requests on behalf of a division. The IT Liaison works with the PMO to define the project’s goals and objectives, keeps abreast of major project activities, and is a decision-maker for the project.

Project Manager- The Project Manager is the person assigned by Information Technology Division to ensure that the Project Team achieves the project objectives and completes the project. The Project Manager develops the Project Charter and Plan with the team and manages the team’s performance of project related tasks. The Project Manager also secures acceptance and approval of deliverables from the Project Sponsor and Stakeholders. The Project Manager will:

- Develop, monitor, and review project management deliverables & activities within the project plan.
- Communicate to and receive feedback from the project team.
- Escalate and resolve issues as needed.
- Initiate project meetings in consultation with project team and sponsor.
- Develop project and implementation plans.
- Prepare deliverables for approval by stakeholders.
- Schedule and track resources.
- Communicate project status to Project Sponsors and stakeholders.

Project Management Office - The Information Technology Project Management Office (PMO) supports the Information Technology Division’s commitment to more structured planning and process/project management. The PMO helps the IT Division select the right projects and supports their successful implementation through planning, project work, and oversight. The PMO ensures that all Information
Technology projects are managed in accordance with approved BSU Project Management Methodology.

The Project Management Office is available for:

- General Project Management questions and advice
- Facilitation of project planning, project kickoff, reviews, and lessons learned sessions
- Project Management training, mentoring, and consulting
- Team Dynamix technical support (online Project Portfolio Management (PPM) platform)
- Project Portfolio oversight, reporting, and escalation

**Functional Director** – The Functional Director is responsible for providing resources (both people and equipment) as needed according to the Project Plan. They may also function as a Subject Matter Expert and provide oversight and guidance for the project.

**Service Owner** - The Service Owner is accountable for a specific service (Infrastructure, Application or Professional Service) within the organization regardless of where the technology components or professional capabilities reside.

**Subject Matter Expert (SME)** - The Subject Matter Expert is that individual who has a high level of expertise in performing a specialized job, task, or skill within the organization. Project Managers need to work with SMEs in the research and execution phases of a project and should involve them in the technical validation of project charters and plans.

**Project Planning Team** - The Project Planning Team assists the Project Manager in defining and creating the project charter and the project Plan. The Project Planning Team may include the subject matter experts who can assist with defining the activities, resources, and schedule information required to produce the project plan.

**Project Team** - The Project Team has responsibility for conducting project activities. Project Team members, as necessary, assist the Project Manager in planning the development effort and help construct commitments to complete the project within established schedule and budget constraints. The Project Team may include the subject matter experts responsible for implementing the project solution. Customers and/or Stakeholders should interact with the Project Team to ensure that requirements are properly understood and implemented. The Project Team may include both Bridgewater State University staff members and external Consultants brought on for the project engagement.

**Stakeholders** - Stakeholders are persons or organizations that are actively involved in the project, or whose interests may be positively or negatively impacted by the project, or who might exert influence over the project.
THE PROJECT REQUEST AND APPROVAL PROCESS

Any work requested of the Information Technology Division that is not a core service (e.g. creating accounts, adding phones and computers, etc.) or for the repair (break/fix) of a core service item, requires the submission of a project request to the Project Management Office. Once submitted, all project requests will progress following the workflow described below. Information Technology strongly encourages staff members with new project ideas to consult first with the BSU IT SharePoint site/IT Services (https://my.bridgew.edu/departments/it/SitePages/IT%20Services.aspx) for a listing of current services we provide, then with leadership (Vice-Presidents or AVP’s) in their division before embarking on the development of a full project request. In this way, the requestor will be certain that the project concept is aligned with department, divisional and institutional strategy.

All IT Project Requests will be submitted online to the IT PMO by a formally designated IT Liaison. The IT PMO will review the request and refine as needed. Formal project scoring and portfolio planning will occur as part of the Annual Project Review Process beginning in February. The requests will initially be classified as “approved”, “declined” or “deferred” based upon their project score, the institution’s ability to successfully execute the projects, and how the projects align with the goals of each division. Approved projects will be those projects that are considered to be the highest priorities of the University and will be shared and prioritized with the Area Vice-Presidents to ensure that the approved projects, if applicable, are included in the Annual Budget process and are funded appropriately. The Annual Budget packet will include a worksheet for Project Request funding to be completed for projects with non-BSU staff costs (software, licensing, professional services, hardware, etc.) and will need to gain approval and be adequately funded prior to the initiation process beginning.

The Chief Information Officer will share the approved Project Portfolio with the Divisional Vice Presidents, designated IT Liaisons, the Information Technology Division. The Project Portfolio will be posted to the BSU IT SharePoint site/IT Consulting & Projects/Project Reports (https://my.bridgew.edu/departments/ITProjectManagementOffice/SitePages/Project%20reports.aspx).

Please see the Project Request and Approval Process for more information. https://my.bridgew.edu/departments/ITProjectManagementOffice/Shared%20Documents/Project%20Request%20and%20Approval%20Process.v1.6%20Final%20202202015.pdf
PROJECT INITIATION PHASE

Overview

- Delivers a Project Charter.
- Defines the preliminary project cost, scope, roles, and timeline.
- Formalizes the existence of the project.
- Approves the project to advance to the Planning Phase.

Description

The Initiation Process is that time in the project lifecycle when the project idea is defined, evaluated and then authorized to proceed by the Project Sponsor and the Chief Information Officer. The project justification, significant deliverables, risks, estimated cost and resource requirements and other information about the project are documented and reviewed in a formal manner. This detailed information will be contained in the project charter. The Initiation Process provides several benefits:

- The Initiation process guides the project team as they determine and articulate those key aspects of a proposed project that will help in the decision process.
- Careful development of Initiation’s key deliverable, the Project Charter, helps to ensure that the technology projects chosen to proceed will be successful.
- A well-written project charter can help everyone involved in the project understand and come to agreement on exactly what is being proposed, the benefits that can be expected, the technical approach to be taken and how the project’s deliverables will fit into ongoing operations.

The amount of effort that goes into the Initiation Phase of a project will depend in some part on the size and complexity of the proposed project. We generally will need to know more about large Strategic Projects that represent substantial investment than about smaller Operational Projects. The total effort required to complete the Initiation Phase may range from a few hours to several weeks. So that effort is not wasted, it is essential to keep focus on the purpose of initiation: to produce a project charter that will authorize the project to move forward and serve as the basis for all subsequent project management and planning activities.

Initiation Processes Activities

- Agree to a vision for the project.
- Define the major goals & project justification.
- Reviews Project Charters, Project Change Controls, Best Practices and Lessons Learned from previous like projects.
- Identify all of the project stakeholders.
- Identify service owners
- Identify a project manager and establish others' roles and responsibilities.
- Identify the resources required, the cost estimates, and a broad timeline.
- Create the Project Charter.
- Obtain approval from Project Sponsor to move forward with detailed planning.
Deliverables of the Project Initiation Phase:

Project Charter

The Project Charter is the major deliverable created in the Initiation Phase. The Project Charter is critical because it will be the first formal definition of what the project is. The Project Charter formally authorizes the project to exist, establishes the Project Manager's authority, and documents high-level requirements, milestones, and success criteria. The Project Charter is not a Project Plan – The Project Plan will be created in the Planning Phase once the Project Charter has been approved. The Project Charter must be created using the Project Charter template in Appendix G. 

https://my.bridgew.edu/departments/ITProjectManagementOffice/SitePages/Project%20Templates.asp

The Project Charter must contain:

- The Project Goal (what is the purpose for doing the project)
- Objectives and outcomes
- Scope (overview of what's in, out, uncertain)
- Stakeholder roles, responsibilities and involvement
- Major Deliverables/Milestones
- Time Frames (high-level until project planning completed)
- Funding authority
Project Planning Sessions/Business Process Analysis:

Before creating the Project Charter it is often necessary to conduct one or more Project Planning Sessions or high level Business Process Analysis (BPA’s). Project Planning Sessions are held because we often can’t draft a Project Charter until we understand in greater detail what we are being asked to do. However, the Project Planning Session is not the same as the Project Kickoff Meeting. Project Planning Sessions help establish the high level plan overview with the project leadership team. The Project Kickoff Meeting communicates the project plan to the entire project team. Project Planning Session helps define:

- Clear articulation of project work
- Consensus on purpose, communications, and decision-making authority
- Understanding of roles, responsibilities, and dependencies
- Proactive awareness and mitigation of risks
- United team for project execution

Project Charter Review:

A complete and well written Project Charter is critical to the success of all projects. Everyone involved in the project must share the same understanding of what outcome the project hopes to achieve and how that outcome will be reached. The PMO will work with Project Manager and Project Stakeholders to develop and refine the Project Charter until they feel the Charter is ready for review and approval.

- Project Manager and PMO perform initial review of Project Charter.
- Project Manager and PMO agree to Charter completion.
- Project Manager schedules Project Charter Review Meeting with Project Sponsor(s), Project Team and Stakeholders.
- Project Manager facilitates Project Charter Review Meeting(s) iteratively until Project Charter ready for final approval.

Phase Gate: Project Charter Approval

After completing a thorough planning and review process, the Project Charter is ready for approvals. No further planning or task work should be done on any project until the Project Charter has been approved.

- Project Manager circulates Project Charter for final approval by Sponsor(s).
- The Project Charter must be approved by both the Project Sponsor(s).
- Approved Project Charters are stored in hard copy in the Project Management Office (PMO), electronically in the Project Briefcase in Team Dynamix (Required) and added to the IT Project Management Office SharePoint site for future reference.
PROJECT PLANNING PHASE

Overview

- Delivers a Project Plan.
- Defines the detailed project schedule, budget, and resource assignments.
- Provides the baseline to execute and manage the project.
- Approves the project to begin work.

Description

The Planning Phase is critical to a project’s success. A well thought-out project plan will provide the project team with a clear direction and understanding of their contributions to the success of the project. A detailed project plan is simply a list of the tasks and activities that must be accomplished in order to reach a milestone or produce a deliverable. Where the Project Charter is created at the macro level, the detailed plans are at the micro level and function as the work plan for each team member.

In the Planning Phase, the Project Manager works with the Project Team to create the technical design, task list, resource plan, communications plan, budget, and initial schedule for the project, and establishes the roles and responsibilities of the project team and its stakeholders. Project planning is an iterative process which may occur more than once throughout the project. The level of planning detail required for work more than 2 – 3 months in the future may not need the same precision as work in the next two months. However, these plans should be reviewed and revised every month until completion of the project. The frequency for doing iterative planning will also depend on the size, complexity and risk level of the project.

Planning Processes Activities

- Gather functional requirements, to define scope of work as needed.
- Perform a risk assessment, analysis and include mitigation options as appropriate (optional).
- Determine resources and staffing needs.
- Assess the communication needs and, if required, prepare a communication plan.
- Analyze testing needs and plan accordingly.
- Assess training needs and develop a strategy or plan as appropriate.
- Prepare a detailed scope document that includes how to verify completion of deliverables.
- Create a project plan that establishes the work breakdown structure and a schedule.
- Obtain consensus of the project team and project stakeholders on project plan.
- Enter the Project Plan into Team Dynamix
- Create an agenda for project kickoff
Deliverables of the Project Planning Phase:

**Project Plan**
The Project Plan is a task list created within Team Dynamix. The Project Plan contains:

- A Detailed Task list. Each task should contain
  - Estimated effort
  - Estimated duration
- Milestones
- Resources – who will do the work
- Schedule – the dates the work will be done
- Dependencies – which tasks depend on the start or completion of another task

**Communications Plan** (optional)
A communication plan facilitates effective and efficient communications with the various audiences having a major stake in the project. It describes how project communications will occur. The Communications Plan should be created using the template in Appendix B.

https://my.bridgew.edu/departments/ITProjectManagementOffice/SitePages/Project%20Templates.aspx

A communication plan includes the following elements:

- Communication objectives
- Target audiences
- Key content for the communications
- Communication method and frequency

**Service Transition Plan** (optional)

A service transition plan helps manage the change of state of a service in its lifecycle. Managing new, changed and retired services that may be created or altered as part of a project protects the product environment. Curating service knowledge helps all stakeholders make informed, reliable decisions and support challenges with service delivery. Both managing service risk and curating service knowledge are integral to service transition.

**Project Kick-Off Meeting**
The Project Kickoff Meeting formally recognizes the start of the project. The Project Manager uses this meeting to communicate a shared view of the project to ensure understanding of the approved Project Charter and plan. The Project Kickoff Meeting provides an opportunity for the following:

- Introduce Official Sponsor(s) and Project Manager
- Introduce Team Members and Stakeholders
- Review Project Scope, Definition and Objectives
- Review High-level Timeline & Milestones, Roles, and Budget
• Review Deliverables
• Review Challenges
• Explain Next Steps

The Project Kickoff Meeting ensures that all Stakeholders are familiar with and share a common understanding of the approved Project Charter and that they are aware of the next steps to complete the project Work Plan. The more complete the resulting plans, the more likely project implementation will progress efficiently and effectively. The following persons/roles must be involved in the Project Kick-Off Meeting:

• Project Manager
• Project Team/Stakeholders
• Project Sponsor(s)

Phase Gate: Project Plan Review & Approval

A project plan is finalized when it is formally accepted and approved by the Project Management Office. Formal approval acknowledges that all the deliverables produced during the Planning Phase are complete, reviewed, and accepted. The Project Manager should review the plan with the Project Management Office and acquire written approval of the project plan from the PMO, to indicate final approval. This sign-off marks the plan as the go-forward agreement and can be viewed as a project management milestone.

• Obtain approval to move forward with executing the project plan.
• Conduct the Project Kick-off Meeting to formally enter the Execution Phase.
PROJECT EXECUTION & CONTROL PHASE

Overview

- Creates and delivers the end product or service.
- Executes the tasks in the schedule.
- Delivers regular updates to stakeholders detailing progress.
- Relies on the plans from the Planning Phase to control the project.
- Expends most of the project resources.

Description

The purpose of the Execution & Control phase of the project is to manage every aspect of project delivery to assure the project is successful. At this point, the Project Plan has been approved and the project management working deliverables have been established. In this phase, the execution of the project is being managed and its progress tracked to the plans established during project planning. To ensure the project stays on-schedule and within budget, performance is monitored against the project plan and adjustments are made as necessary.

The Execution & Control Phase answers the questions of:
- Are we on track to complete the work as we planned it?
- If not, what do we need to do to get back on track?
- Who should we keep informed about our progress, and how often?

In the Execution & Control Phase, the Project Manager works with the project team to perform the work of the project as planned. The Project Manager monitors the progress of the team, identifies issues or risks that occur, creates a mitigation plan with the team, and regularly reports on the project’s status to various audiences. The Execution and Control Phase is critical to a project’s success. A proactive approach to project execution allows for rapid responses to any changes in the project plan, and a consistent, regular, and appropriate level of status reporting provides all interested stakeholders with project information. By keeping stakeholders informed of the project’s progress, the Project Manager provides them the opportunity for intervention or redirection as needed in order to keep the project moving toward successful completion.

Executing & Control Processes Activities

- Procure or secure any required resources (hardware, services, software, etc.).
- Make project information available to stakeholders.
- Work Results (deliverables) are created.
- Conduct status review meetings; disseminate status reports.
- Change management (original project scope, cost, schedule, and technical strategies).
- Direct and lead the project team.
- Manage project progress.
- Ensure project progresses according to the plan.
- Manage any project issues and risks.
Project Manager Duties:

1. Updating the project task status in Team Dynamix daily.
2. Updating the overall project status weekly in Team Dynamix.
3. Conducting regular team meetings, to discuss:
   - Progress of scheduled work
   - Issues or risks to progress
   - Changes to initial plans to address issues/risks
   - Checkpoint on upcoming milestones
4. Issuing regular, appropriate communications to stakeholders, according to communications plan.
5. Perform Project Change Control as necessary.
6. Conducting a project review with stakeholders, as appropriate.
7. Taking necessary actions to clear any roadblocks or challenges to progress.

Project Management Office (PMO) Duties:

1. Conducts weekly reviews of project health in Team Dynamix
   - Ensure progress on scheduled tasks
   - Ensure Project Managers are adhering to Project Management Methodology
2. Conducts monthly Project Oversight Meetings with Project Managers, to discuss:
   - Progress of scheduled work
   - Checkpoint on upcoming milestones
   - Review and address project interdependencies
3. Ensures that project status information is accurately communicated to IT Senior Management

Deliverables of the Execution & Control Phase

Project Change Requests

Project Change Control is performed from project inception to completion, because change is inevitable on any project. The defined project scope and schedule baseline must be maintained by continuously managing changes to the baseline, either by rejecting new changes or approving changes and incorporating them into the revised project plan.

Any proposed change to project scope (deliverables), cost, schedule, or technical strategies requires an approved Project Change Control Request (see Appendix C)

https://my.bridgew.edu/departments/ITProjectManagementOffice/SitePages/Project%20Templates.aspx

Scope Change – Any change to the agreed upon deliverables of the project.
Schedule Change – Any changes to the agreed upon start/completion dates of the project (not tasks).

Cost Change – Any change to the agreed upon costs (budget) associated with the project.

Resource Change – Any removal or addition of staff or resources from/to the project team.

Technical Change - Any major change in technical strategies. This would apply only if a specific technology was mentioned in the Project Charter (e.g. we are going to use a SQL Server database where the charter mentioned an Oracle database).

The Project Change Control Process includes:

- The Project Manager identifies whether a change needs to occur or has occurred.
- The Project Manager evaluates the impact to the project versus the benefit of the change.
- The Project Manager completes a Project Change Request Form (see Appendix C).
- The Project Manager notes the Project Change Request in Team Dynamix.
- The completed Project Change Control Request is submitted to the PMO.
- The PMO engages the Project Sponsor to review the Project Change Request.
- The Project Sponsor(s) and the PMO are responsible for reviewing and approving or rejecting the requested changes.
- The signed Project Change Control request is scanned and added to the Project Briefcase in Team Dynamix (Required) and added to the IT Project Management Office Share Point site for future reference.

Project Status Reports

The Project Manager is responsible for weekly status reporting. For the Project Managers and Project Teams, status reporting helps them stay on track and on task. Accurate project status reporting also provides an ongoing view of our project portfolio, and high-level information for divisional stakeholders including the VP of Information Technology and the Senior Management Team. Status Reports should be produced weekly in Team Dynamix. Status Reports are used to communicate the following key information:

- Current activity status (schedule)
- Significant accomplishments for the current reporting period
- Planned activities for the next reporting period
- Present Issues, Concerns/Risks

Status Reporting Overview

The project status reports in Team Dynamix are available to the Project Sponsor and the Information Technology Division Management Team. The Team Dynamix Analysis module allows the team to review the status reports of the entire project portfolio, identifying bottlenecks with divisional resources, analyzing progress toward delivery of our technology commitments, and identifying projects that require management intervention. The Project Manager is responsible for any follow up or resolution
actions generated by management review of the project status. There are 4 main components to the weekly status report:

- The project start and end dates
- The overall project status
- The overall percent complete
- The Project Managers Comments on the project’s progress

When to report:

The Project Manager should provide an updated project status report weekly by Friday of each week. Team Dynamix and the PMO will issue email reminders to all Project Managers reminding them to update the status of all projects they are managing.

Where to report:

In Team Dynamix Projects module, the Project Manager should enter the Management folder to complete the monthly status report. Clicking on the project name will open the project file, and the Project Manager can then click the “Update Project Status” green action button to complete the status reporting for that month.

What to report:

Project Start and End Dates
- If there is a negotiated change to the start and end dates of the project, these dates should be updated in the project’s “General” tab under the Management folder in TD.

Overall project status
- At this time, Project Managers should update their project status (color) based on the following guidelines:

Project Status Color:

Green  Green status signifies the project is on its currently negotiated schedule and budget, and there are no unresolved issues causing delays/overruns

Yellow  Yellow status signifies the project MAY be one of the following: behind schedule, or over/under budget, or there are unresolved issues or risks that could cause delays/overruns. However, a plan is in place to get the project back on track.

Red  Red status signifies that the Project IS more than one of the following: behind schedule and/or over/under budget, and/or there are unresolved issues or risks that WILL cause delays/overruns.

Blue  Blue status signifies that the project has been approved. However the project is still is not yet underway and does have an approved project charter.
Note that a project whose schedule and/or budget are re-negotiated to address issues should revert to green once that negotiation is complete with the project’s direct and indirect stakeholders. The Project Manager should use the color that best reflects the current state of the project AND their communications/negotiations about its status with stakeholders.

**Overall percent complete**

Project Managers should make their best estimation on the overall completion of their project based on factors such as the number of tasks and milestones completed and where the project is according to its original timeline.

**Comments on the project’s progress**

To provide a clear picture of the project status, the Project Managers should answer the following questions about their project using the required Comments field in Team Dynamix:

- What progress/milestones have been achieved since last update? (“The project has entered testing” or “The team has installed the required hardware or software”)

- Are your upcoming milestones on track or not? (“The project is shifting the due date of new code development due to resource issues – we plan to recover the time by testing in parallel with users”)

- What unresolved technical issues is the project experiencing? (“None at this time”)

- What unresolved business issues is the project experiencing? (“A resource is unavailable this month due to their internal scheduling demands”)

- What assistance does the project need from management? (“None at this time” or “Agreement or approval of date shift of 1 week for development”)

Answers to these questions should be included in every weekly status report, regardless of the G-Y-R status of the project. The Comment section is a clear opportunity for the Project Manager to communicate progress, successes, or obstacles to the Project Sponsor and Senior Management.

Note that these questions, along with the Team Dynamix navigation procedures, will be included in the PMO weekly reminders to the project managers of all active projects.
Reporting and Managing Project Issues:

- An issue is defined as a situation, problem, or an activity that has happened, or is happening, which impacts upon the approved Project Plan.
- A project issue is a concern or request raised by any stakeholder that needs to be addressed, either immediately or during the project.
- Project issues need to be reviewed during the project as they could become a serious threat to the project and therefore a mitigating strategy needs to be prepared.
- Issues are different from risks. An issue is something that is a problem that has happened or is happening, whereas a risk is something that may happen in the future and may have an effect on the project.

Types of Issues:

General Issue - Any Issue raised that requires an answer or an action to rectify

Request for Change - Issue raised that requests an alteration to project deliverables, schedule, budget, or technical strategy

Off-Specification - Issue raised when some project deliverable is not currently provided for or adequate to meet client needs (e.g. not meeting quality standards)

Business Process Improvement - Issue raised when a stakeholder makes a suggestion for process improvement (issues don’t have to be negative!)

Creating Issues in Team Dynamix

The Project Manager can create an issue in Team Dynamix. To create a new issue, the Project Manager should:

- Enter the Issues module of a project in Team Dynamix.
- Click on the "Create Issue" link underneath the "Issues" folder in the left navigation bar.
- Enter a subject for the issue in the "Subject" textbox.
- Enter a due date for the issue in the "Due Date" textbox if desired.
- Select a priority from the "Priority" dropdown list if desired.
- Select a status from the "Status" dropdown list if desired.
- The user must choose an issue type from the "Category" dropdown list.
- If the issue is linked to a task, click the "Lookup" button next to the "Task" textbox. Select the task from the lookup window.
- The user must also assign a responsibility to the issue by selecting a project member from the "Responsibility" dropdown list. To assign responsibility to a TDClient user, check the "Show Client User" box next to the dropdown list. Client users will now appear in the dropdown list.

To notify the Project Team or the Project Sponsor that this issue is posted:

- Select appropriate project members from the "Notification" list by placing a check next to their names.
• Notifications will be sent upon saving the issue.
• The user may choose to be notified when the issue is closed and/or to publish the issue at the point.
• Enter the description for the issue.
• Add an attachment if desired.
• When finished, click on the "Save" button.

Project Closeout Readiness Review

When the Project Manager deems that all project tasks have been completed and all agreed upon deliverables have been created, the Project Manager will engage the PMO to conduct a Project Closeout Readiness Review. The Project Closeout Readiness Review will confirm that the project deliverables are completed and that the project can move to the Closing Phase.
PROJECT CLOSING PHASE

Overview

- Concludes all project activities.
- Administratively closes the project.
- Turns the delivered product or service over to customer or a support group.
- Assesses project outcomes and team performance.
- Documents best practices and lessons learned.
- Celebrates project success.

Description

The purpose of the closing phase in the project management lifecycle is to confirm completion of project deliverables to the satisfaction of the project sponsor, and to communicate final project disposition and status to all participants and stakeholders. Project closure ensures that all participants and stakeholders to the project are informed of follow-on activities (e.g. new projects, service transitions, SLAs, etc.), and have sufficient opportunity to communicate and coordinate with related projects and/or production service owners. Closing activities must also include identification and capture of lessons learned and best practices, and archival of these organizational process assets (OPA’s) in Team Dynamix for subsequent reference, organizational learning and reuse.

The PMO can provide Project Managers various levels of service in the Closing Phase including:

- Consult with appropriate teams to transition the project to operations
- Facilitate Project Closure/Lessons Learned Meetings
- Consult on completing the Project Closure Report
- Brainstorm team celebration ideas

Critical Success Factors

- Pre-defined user acceptance criteria
- Business objectives and anticipated benefits are achieved
- Project objectives are achieved
- Knowledge transfer is achieved
- Project materials are archived

Closing Processes Activities

- Obtain acceptance of the project deliverables.
- Hand off operations and support responsibilities.
- Document the lessons learned over the course of the project.
- Formalize closure. Obtain sign-off from project sponsor and project manager.
Duties of the Project Manager in the Closing Phase

For a completed project, the Project Manager is responsible to:

1. Work with the PMO to schedule and conduct a Project Closure/Lessons Learned Meeting.
2. Complete the Project Closure Report. The report will confirm, in writing, from the project sponsor and/or customers that the project is complete. The completed Project Closure Report should be posted to the Project Briefcase in Team Dynamix (Required) and added to the IT Project Management Office Share Point site for future reference.
3. Arrange for an appropriate celebration of the work completed. Remember to have fun! (Optional, but recommended)
4. Close and deactivate the project in Team Dynamix (Required).

Deliverables of the Closing Phase:

Project Closure Meeting

The PMO should schedule and facilitate a Project Closure Meeting with the Project Manager, Project Sponsor, other Project Managers and the entire Project Team. The questions that should be answered in the Project Closure Meeting are:

If the project work is completed:
   • Did we accomplish all of the agreed upon objectives in this project? Has this been communicated to all project stakeholders?
   • What follow up work will be required of future projects?
   • How do we "operationalize" the project, so that on-going support is provided (if necessary)? At the end of the Closing Phase which operations group will take over the support or administration of the product or service?
   • What lessons did we learn from this project?
   • Does the project team know that their hard work was appreciated?

If the project has been cancelled or suspended:
   • What are the reasons for cancelling or suspending the project?
   • Are there any plans to reactivate the project in the future?
**Project Closure Report**

After the Project Closure Meeting the Project Manager must produce a Project Closure Report using the Project Closure Report template contained in Appendix D.

https://my.bridgew.edu/departments/ITProjectManagementOffice/SitePages/Project%20Templates.asp

The purposes of the Project Closure Report are:

- Measures how closely the project met customer needs
- Identifies what worked well on the project and what needs improvement
- Documents any deviations from the original plan and identify causes
- Articulates methods for improvement
- Formulates Lessons Learned and Best Practices from feedback

The Project Closure Report should contain a Lesson Category. Category choices should include but not limited to the following:

- Project Change Management Process
- Project Estimation
- Project Resources (scope, schedule, budget, resources)

For each Learned Learned, if applicable, an action item should be identified within the description. For example a line item added to the Project Plan template to prevent recurrence of the issue, a suggestion for the Project Charter, etc. Project Managers should be reminded to always download the most current project templates, as well as project in flight should have the additional tasks/sections added manually upon notification and adoption of a new task or suggestion.

**Approvals**

A project is officially completed when the Project Closure Report is formally accepted and approved by the Project Sponsor(s) and other designated stakeholders. Formal sign-off and approval of this document acknowledges that all of the project deliverables are complete, reviewed and accepted. The approval marks agreement among all stakeholders that the project is completed and this can be viewed as the final project management milestone.
## APPENDIX A: DEFINITIONS

<table>
<thead>
<tr>
<th>Activity</th>
<th>A task or set of tasks that are carried out in order to create a deliverable.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assumption</td>
<td>Factors that, for planning purposes, are considered to be true or certain without proof or demonstration.</td>
</tr>
<tr>
<td>Business Case</td>
<td>The reason or reasons to do a project</td>
</tr>
<tr>
<td>Change</td>
<td>A systematic way of reaching an intended outcome. Philosophically, change is what project management is all about.</td>
</tr>
<tr>
<td>Charter (Project Charter)</td>
<td>Formally authorizes the project to exist, establishes the Project Managers Authority, and documents high-level requirements, and success criteria.</td>
</tr>
<tr>
<td>Constraint</td>
<td>A restriction that will affect the performance of the project. The four primary and universal project constraints are scope, quality, time and resources. A factor that will limit the project team's options. For example, a predefined budget is a constraint that may limit the team's scope, staffing and schedule options.</td>
</tr>
<tr>
<td>Customer</td>
<td>The person or group for whom the project is being undertaken.</td>
</tr>
<tr>
<td>Deliverable</td>
<td>Any measurable, tangible, verifiable item that must be produced to complete the project. There are two kinds of deliverables associated with a project. The term is most often used in reference to those deliverables that are subject to approval by the project customer, e.g., system reports, screens, etc. There are also process deliverables which are produced as a result of the project management process, e.g., Statement of Work, Project Plan, etc.</td>
</tr>
<tr>
<td>Issue</td>
<td>A question that is raised for inquiry or a problem to be solved.</td>
</tr>
<tr>
<td>IT Liaison</td>
<td>The IT Liaison is a designee of an Area Vice-President who is authorized by that Vice-President to represent the division in all Information Technology related matters including the submission of project requests on behalf of a division.</td>
</tr>
<tr>
<td>Lessons Learned</td>
<td>What went well during the project as well as what did not go well. Lessons learned are used to improve current or future project performance.</td>
</tr>
<tr>
<td>Phase</td>
<td>A group of related project activities that allows for more control and often completes a major deliverable.</td>
</tr>
<tr>
<td>Progressive Elaboration</td>
<td>An iterative approach to planning, plans are created in multiple passes rather than all at once.</td>
</tr>
<tr>
<td>Project</td>
<td>A temporary endeavor undertaken to create a unique product, service, or result.</td>
</tr>
</tbody>
</table>
### Project Life Cycle

The sequential phases through which a project passes. These phases contain all of the events, from beginning to end, necessary to complete the project. The generic project phases are:

- **Initiation** – Here the need is examined, high level requirements are developed, solution alternatives are assessed, the project scope is stated and feasibility is examined.
- **Planning** – Here the concept is verified and developed into a workable plan for implementation of the solution.
- **Execution** – Here the project work is undertaken to produce the project’s deliverables and deliver them to the customer.
- **Closeout** – Here is where all remaining project activity required to close the project is completed, e.g., final review, lessons learned, etc.

### Project Management

The planning, monitoring and control of all aspects of a project in order to achieve the project objective with respect to specified cost, quality and performance.

### Project Management Office (PMO)

The organizational entity charged with providing a focal point for the discipline of project management.

### Project Manager

The individual assigned by the organization who will be responsible for achieving the project objectives.

### Project Objective

A predetermined result toward which effort is directed. A concrete statement describing what the project is trying to achieve. An objective should be written at a low level so that it can be evaluated at the conclusion of a project to see whether it was achieved or not. A well-worded objective will be Specific, Measurable, Attainable/Achievable, Realistic and Time bound (SMART).

### Project Plan

An approved document used to manage and control the project work that includes a detailed schedule.

### Project Review

An evaluation of project results.

### Project Sponsor

The person who can secure any necessary funds for the project and settle policy issues as they arise.

### Requirements

Description of desired results. A negotiated set of measurable customer wants and needs. Requirements should be distinguished as “must haves” and “nice to haves”.

### Risk

The likelihood of an undesirable outcome.
| **Schedule** | Planned dates for starting and completing activities and milestones. A detailed schedule shows the timing and sequence of tasks within a project, as well as the project duration. |
| **Scope** | The deliverables that will be produced by the project. Scope describes the boundaries of the project in terms of what will, and will not, be produced. |
| **Stakeholder** | A person or organization that is actively involved in the project, or whose interests may be positively or negatively impacted by the project, or who might exert influence over the project. |
| **Statement of Work (SOW)** | A detailed narrative description of the work to be performed. The SOW includes:  
* Project Overview  
* Scope (Deliverables)  
* Estimates (Effort/Cost/Timeline)  
* Assumptions  
* Risks  
* Approvals |
| **Task** | A well-defined unit of work that has entrance criteria (pre-conditions) and completion criteria (post-conditions). |
| **Timeline** | A schedule showing key dates and planned events. A high level schedule. |
| **Work Breakdown Structure (WBS)** | A deliverable-orientated hierarchical decomposition of the work to be completed on a project. |
APPENDIX B: COMMUNICATION PLAN

A well planned project has a well-planned Communication strategy. The following are guidelines and options when creating a Project Communication Plan.

<table>
<thead>
<tr>
<th>What</th>
<th>Who/Target</th>
<th>Purpose</th>
<th>When/Frequency</th>
<th>Type/Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute Project Charter</td>
<td>All stakeholders*</td>
<td>Distribute Charter to alert stakeholders of project scope and to gain buy in.</td>
<td>Before Kick Off Meeting Before Project Start Date</td>
<td>Document distributed via hardcopy or electronically. Posted on project site in Team Dynamix PPM. PPM Templates: Project Charter</td>
</tr>
<tr>
<td>Project Kick-Off Meeting</td>
<td>All stakeholders*</td>
<td>Communicate plans and stakeholder roles/responsibilities. Encourage communication among stakeholders.</td>
<td>When Project Planning is Completed</td>
<td>Meeting</td>
</tr>
<tr>
<td>Status Reports</td>
<td>All stakeholders</td>
<td>Update stakeholders on progress of the project.</td>
<td>Regularly Scheduled. Monthly is recommended for large/midsize projects.</td>
<td>Generate from Team Dynamix PPM and distribute electronically. PM Template: Status Report</td>
</tr>
<tr>
<td>Project Team Meetings</td>
<td>Entire Project Team. Individual meetings for sub-teams, technical team, and Functional teams as appropriate.</td>
<td>To review detailed plans (tasks, assignments, and action items).</td>
<td>Regularly Scheduled. Weekly is recommended for entire team. Weekly or bi-weekly for sub-teams as appropriate.</td>
<td>Meeting PM Template: Detailed Plan</td>
</tr>
<tr>
<td>Post Project Review</td>
<td>PMO, Project Manager, key stakeholders, and sponsor(s).</td>
<td>Identify improvement plans, lessons learned, what worked and what could have gone better. Review accomplishments.</td>
<td>End of Project or end of major phase</td>
<td>Meeting/Report Project Manager will produce report.</td>
</tr>
</tbody>
</table>

*All stakeholders include team members, sponsors, stakeholders, customers, and the project management office.
<table>
<thead>
<tr>
<th>What</th>
<th>Who/Target</th>
<th>Purpose</th>
<th>When/Frequency</th>
<th>Type/Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly Project Review</td>
<td>PMO, Project Manager, and key stakeholders</td>
<td>Review overall health of the project and highlight areas that need action.</td>
<td>Quarterly depending on size and criticality of the project. Scheduled by the Project Office.</td>
<td>Meeting/Report Project Manager will produce report using internal template.</td>
</tr>
<tr>
<td>Team Dynamix PPM Project Site</td>
<td>IT staff and Project Team Members.</td>
<td>Central location to house Status Reports, meeting minutes, Project description, and Project Plan. For any communications that can be shared with all IT staff.</td>
<td>Update monthly with Status Reports; otherwise, as necessary.</td>
<td>Electronic Communications Venue</td>
</tr>
<tr>
<td>Other...</td>
<td>To be determined by the Project Team</td>
<td>General communications</td>
<td>As needed</td>
<td>Community Announcements, email lists, BSU home page announcements, etc.</td>
</tr>
</tbody>
</table>
**APPENDIX C: PROJECT CHANGE REQUEST FORM**

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change Requestor:</th>
<th>Change No:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Change Category (Check all that apply):**
- ☐ Schedule Change
- ☐ Cost Change
- ☐ Resource Change
- ☐ Scope Change
- ☐ Technical Change

**Does this Change Affect (Check all that apply):**
- ☐ Corrective Action
- ☐ Preventative Action
- ☐ Defect Repair
- ☐ Updates
- ☐ Other

**Describe the Change Being Requested:**

**Describe the Reason for the Change:**

**Describe any Alternatives Considered:**

**Describe any Technical Changes Required to Implement this Change:**

**Describe Risks to be Considered for this Change:**

**Disposition:**
- ☐ Approve
- ☐ Reject
- ☐ Defer

**Justification of Approval, Rejection, or Deferral:**

**Project Change Approval:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
# APPENDIX D: PROJECT CLOSEOUT REVIEW FORM

<table>
<thead>
<tr>
<th>Project Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager:</td>
</tr>
<tr>
<td>Client:</td>
</tr>
<tr>
<td>Closure Criteria:</td>
</tr>
<tr>
<td>Does the client, sponsor or customer agree this project can be closed at this time?</td>
</tr>
<tr>
<td>Goal Review:</td>
</tr>
<tr>
<td>Were all of the goals of this project met? List the goals and describe how the goals were met.</td>
</tr>
<tr>
<td>Deliverables Review:</td>
</tr>
<tr>
<td>List the project deliverables and were they fully or partially accomplished? If partial, what are the reasons, issues or concerns regarding that deliverable? Are there deliverables that were not accomplished?</td>
</tr>
<tr>
<td>Success Criteria Review:</td>
</tr>
<tr>
<td>Did the project provide the planned improvements for the client? Were additional results achieved besides the original success criteria? Were all the business or operational improvements identified or are there other measures of success that could have been part of this project?</td>
</tr>
<tr>
<td>Implementation Methods Review:</td>
</tr>
<tr>
<td>What Project Management tools were used? Were the Project Management tools helpful to the Project Team?</td>
</tr>
</tbody>
</table>
### Resource Review:
Was this project implemented according to the original schedule? Explain any event(s) requiring major schedule changes.

### Lessons Learned:
Identify specific examples of Lessons Learned during this project. Did any issues/problems surface during this implementation that needed to be addressed in the future?

### Reviewers:
(Project Manager, Sponsor, Client/Customer )

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Date:</td>
</tr>
<tr>
<td>Project Sponsor</td>
<td>Date:</td>
</tr>
<tr>
<td>Client/Customer</td>
<td>Date:</td>
</tr>
</tbody>
</table>

**General instructions:** This is a summary document. Bullets and phrases are acceptable. Long narratives are not required.
APPENDIX E: PROJECT CHARTER

Project Charter
Bridgewater State University
Information Technology

Project Name
Project ID: 999999

VERSION: [1.1]          REVISION DATE: [November 11, 2011]
Section 1. Project Overview

1.1 Problem Statement
Describe the business reason(s) for initiating the project, specifically stating the business problem.

Problem Statement

1.2 Project Description
Describe the approach the project will use to address the business problem.

Project Description

1.3 Project Goals and Objectives
Describe the business goals and objectives of the project. Refine the goals and objectives stated in the Business Case.

1.4 Project Scope
Describe the project scope. The scope defines project limits and identifies the products and/or services delivered by the project. The scope establishes the boundaries of the project and should describe products and/or services that are outside of the project scope.

This Project Includes

This Project Excludes

1.5 Critical Success Factors
Describe the factors or characteristics that are deemed critical to the success of a project, such that, in their absence the project will fail.

1.6 Assumptions
Describe any project assumptions related to business, technology, resources, scope, expectations, or schedules.

1.7 Constraints
Describe any project constraints being imposed in areas such as schedule, budget, resources, products to be reused, technology to be employed, products to be acquired, and interfaces to other products. List the project constraints based on the current knowledge today. Include any known or potential risks.

Section 2. Project Authority and Milestones

2.1 Funding Authority
Identify the funding amount and source of authorization and method of finance (i.e., capital budget, rider authority, appropriated receipts) approved for the project.

2.2 Project Oversight Authority
Describe management control over the project. Describe external oversight bodies and relevant policies that affect the agency governance structure, project management, and/or vendor management.

2.3 Project Stakeholders
List all project stakeholders.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

2.4 Major Project Milestones
List the project’s major milestones and deliverables and the planned completion dates for delivery. This list should reflect products and/or services delivered to the end user as well as the delivery of key project management or other project-related work products.

<table>
<thead>
<tr>
<th>Milestone/Deliverable</th>
<th>Planned Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
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</tr>
</tbody>
</table>

Section 3. Project Organization
3.1 Project Structure
Describe the organizational structure of the project team and stakeholders.

3.2 Roles and Responsibilities
Summarize roles and responsibilities for the project team and stakeholders identified in the project structure above.

<table>
<thead>
<tr>
<th>Project Role</th>
<th>Who</th>
<th>University Role</th>
<th>Project Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-Sponsor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Team</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.3 Project Facilities and Resources
Describe the project’s requirements for facilities and resources, such as office space, special facilities, computer equipment, office equipment, and support tools. Identify responsibilities by role for provisioning the specific items needed to support the project environment.

<table>
<thead>
<tr>
<th>Resource Requirement</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
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</tbody>
</table>

Section 4. Project Charter Approval
Approval of the Project Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.
<table>
<thead>
<tr>
<th>Approver Name</th>
<th>Title</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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