Project Charter Template

Purpose

Structured document to describe the project, its objectives, why it matters and who's involved — so everyone's on the same page.

Who this is for

- Project Leads
- Team Members (use for alignment and orientation, support tool building)

When to use

- Proposing the initiative
- Planning and scoping the initiative
- Considering renewal or scaling
- Researching and learning
- Throughout implementation / at key milestones

Introduction | Project Charter Template

Project Charter Template

Considerations

1

Familiarize yourself with each component of the project charter.

Before beginning with your charter, familiarize yourself with each component of the template you want to use to understand its purpose. See the **Project Charter Components** below.

2

Consider a potential pathway through the charter components.

Example: You already know the what **(Project Scope)** and why **(Purpose Statement and Intended Outcomes)** but are exploring who to involve **(Key Stakeholders)** and how to execute the initiative **(Project Approach & Methodology)**.

3

Focus on the components that support your charter goals.

Example: In an Office of Academic Affairs' budget meeting, the VP of Student Success must present three proposed initiatives to negotiate budget allocation and secure approval. What key information do they need to make their case to other VPs and Deans?

4

Review and adjust interconnected components before finalizing.

Example: You secured external funding for your initiative, but the funder has specific reporting requirements. To accommodate this, you'll need to adjust your **Project Scope**, **Timeline**, **Team Roles**, and assessment **Methods** to meet these requirements effectively.

Project Charter Components Example

Each of the following components contains an example. However, if you would like to see a **fully completed project charter** based on a real example purpose statement, you can view and download it in its entirety by clicking on the "Download complete example" button.

Download complete example

Project Charter Template Overview

Disclaimer: The purpose statement is a real example from Portland State University. However, the content for other components in this document is based on the details of this example and is not representative of actual project documentation.

– Purpose Statement

A purpose statement for an initiative outlines the primary goals and objectives the project intends to achieve, providing a clear and concise roadmap for the project's trajectory and alignment with an institution's strategic goals. Your purpose statement should be brief but comprehensive. Review the questions below to explore what to put into your purpose statement.

Considerations

1. **What is the problem you are trying to solve?**
2. **What are the initiative's objectives, and why are they needed?**
3. **How will the initiative benefit the institution and core institutional stakeholders (e.g., Students, Faculty, Staff)**

4. ### How will you measure the success of the initiative?

Tips

A simple way to write your purpose statement is to use the **SMART-goal principle**: specific, measurable, achievable, relevant, and time-bound.

Review the example below and consider what information might be missing to make it a **SMART** statement.

Example

This purpose statement is a real example from Portland State University. However, the content for other components in this document is based on the details of this example and is not representative of actual project documentation.

The purpose of the myNextSteps project is to create a mobile-friendly online resource for students where they can see a personalized list of important business deadlines and next steps in one place and that notifies them of critical steps related to the business of being a student (especially for enrollment, billing, and financial aid). This project responds to students' repeated requests for accessible and student-friendly online information. It is an effort to minimize potential barriers to successful retention and graduation, as outlined in our strategic goals. (from Portland State University)

– Intended Outcomes

Intended outcomes refer to the specific results or changes a project aims to achieve once completed. These outcomes are typically aligned with an institution's strategic plan and goals and are used to measure the project's success.

Considerations

1. **What do you hope to achieve through this initiative in the short and long term?**
2. **What are the expected benefits for the institution, and when will they manifest?**
3. **What key metrics or key performance indicators (KPIs) are you focusing on?** See the Data Use Toolkit for information on KPIs and how to collect them.

Tips

Start with outlining in 1-3 bullet points what you hope to achieve in this initiative.

Try connecting each intended outcome to your institution's strategic plan and goals.

Sometimes, planning starts with pre-defined outcomes (set by states, funders, or leadership); other times, it begins with exploring possible outcomes. Keep both pathways in mind as you plan.

Example

Let's explore the intended outcomes of PSU's myNextSteps project.

What do you hope to achieve through this initiative in the short and long term?

Short Term: Launch a mobile-friendly online resource that consolidates personalized business deadlines and critical steps for students.

Long Term: Boost student retention and graduation rates by reducing barriers related to enrollment, billing, and financial aid.

What are the expected benefits for the institution, and when will they manifest?

Benefits: Aims to boost student engagement and satisfaction with a streamlined resource, leading to better accessibility, retention and graduation rates.

Timeline: Benefits should appear shortly after launch, with impacts on student success becoming evident within the first academic year.

What key metrics/KPIs are you focusing on?

User Engagement: Number of students accessing and using the resource.

Student Satisfaction: Feedback on the usability and usefulness of the resource.

Retention Rates: Changes in student retention and graduation rates.

Response Time: Time taken to notify students of critical deadlines and steps as well as time taken by students to respond to these requirements.

– Project Approach & Methodology

A project approach and methodology provide a structured framework to plan, execute, and complete a project. The project approach outlines the overall strategy and direction for your project. At the same time, the methodology is a specific set of practices, techniques, and tools you will use to manage your project.

Considerations

1. **What will you do, and how will you do it? Describe the approach, methodology, and processes to be used in executing the project.**

2. **If your project ultimately impacts students or involves them directly or indirectly, how will you incorporate student voice and/or experience?**

Example

Let's explore a possible approach and methodology for PSU's myNextSteps project.

What will you do, and how will you do it?

Approach: Develop a mobile-friendly and accessible online resource with user-centered design principles. Focus on creating software that meets students' needs through intuitive navigation and functionality, ensuring a seamless experience across various devices.

Methodology: We will use Agile methodology led by our development partner to iteratively develop the resource, allowing for continuous feedback and improvements. This includes requirement scoping, user interface design, development, testing, and final adjustments before the full launch.

Processes: Key processes include stakeholder consultations, requirement gathering, development sprints, user testing, feedback incorporation and alignment with institutional goals and compliance with reporting requirements.

If your project ultimately impacts students or involves them directly or indirectly, how will you incorporate student voice and/or experience?

Incorporation of Student Voice: Engage students through surveys and focus groups to gather input on their needs and preferences. Their feedback will be integrated into the design and functionality of the resource to ensure it effectively addresses their concerns and enhances their experience.

Resources:

- Prioritizing Equity in Transformation – Frontier Set
- Voce (Voice) Strategy – REP4
- Incorporating student perspectives ensures your initiatives are truly student-centered and responsive to their needs. Learn how to bring student voices into the conversation here: Bringing Student Voice into the Room.

– Deliverables

Deliverables identify the tangible or intangible outcomes (see the Identifying Impact and Value Tool) produced from a project's activities. They are specific, measurable outputs or results that must be completed and delivered to fulfill project objectives. Deliverables are typically defined at a project's beginning and used to measure progress and success.

Considerations

1. **What will you need to submit or deliver during the project? At the end of the project?**

2 Who do you need to share deliverables with?

See the Key Stakeholders component for information on identifying and including stakeholders.

3 Who owns the creation of the deliverables?

Tips

Remember to allocate time in your project timeline for receiving and incorporating stakeholder feedback on deliverables.

Example

Let's explore possible deliverables for PSU's myNextSteps project (see Purpose Statement and Timeline for milestones).

#	Deliverable	Purpose	Share with	Owner / Other roles
1	Project Charter Document	Outline project goals, scope, and key components	Project team, stakeholders, and leadership	Project Lead
2	Procurement and Buy-in Documentation	Includes development partner offers, budget approvals, and contracts	Procurement team, finance department, and institutional administration	Project Lead, Procurement Specialist
3	Software Development	–	–	–
3.1	Requirements Document	Define resource needs and functionalities	Development team and stakeholders	Project Lead, Development Lead
3.2	Design Specifications	Detailed design for user interface and experience	Development team and stakeholders	UX/UI Designer, Development Lead
3.3	Functional Software	The completed and tested mobile-friendly online resource	Students, project team, and stakeholders	Project Lead, Training Coordinator
4	Training Manual / Training Plan for Staff	Provide guidance and training for staff/support on using and supporting the resource	Staff/support teams	Development Team
5	Communication Plan	Inform and train students about the new resource	Students	Project Lead, Communication Lead
6	Initial Feedback Report	Collect and analyze user feedback from initial launch	Project team and stakeholders	UX Researcher, Project Lead
7	Adjustment and Improvement Plan	Document changes and enhancements based on feedback	Development team and stakeholders	Project Lead, Development Lead
8	Monitoring and Evaluation Report	Assess the impact on student engagement, retention, and graduation rates	Project team, institutional leadership	Evaluation Specialist, Project Lead

9	Final Project Report	Summarize project outcomes, lessons learned, and final metrics	Stakeholders, institutional leadership	Project Lead

– Project Scope

The project scope provides a framework for what will and will not be included in the project. Without clear boundaries and limitations, projects tend to expand and can become unwieldy. Lay out what is in and out of scope upfront to protect against mission creep, uncontrolled changes, or project expansion.

Considerations

1. **Who needs to be included in project scope discussions?**
   See the Key Stakeholders component for information on identifying and including stakeholders.

2. **What work/tasks/deliverables will be included in the project and considered 'in-scope'?**

3. **What will be explicitly excluded from the boundaries of a project and considered 'out of scope'?**

Tips

Make reviewing the initiative scope a routine part of your periodic oversight practice to ensure it stays on track and does not drift.

Getting buy-in and a sign-off on your scope from your leadership is an effective tool for managing expectations and workload.

Example

Let's identify what is out of scope for PSU's myNextSteps project based on the Purpose Statement and Deliverables.

What will be explicitly excluded from the boundaries of the project and considered 'out of scope'?

Non-Mobile Platforms: Development or support for non-mobile versions of the resource.

External System Integrations: Integration with systems not directly related to the project's primary goals.

Non-Educational Content: Any content or features unrelated to the business deadlines or next steps for students.

Extended Feature Requests: Requests for additional features or functionalities not included in the initial project requirements.

Continued Ticket/Tech Support After Launch: Ongoing technical support beyond the initial post-launch phase.

Continued Content Updates After Launch: Regular updates or additions to content beyond the initial project scope.

– Needs Assessment

A needs assessment identifies and evaluates gaps between current conditions and desired outcomes. It helps institutions understand the specific needs of their target population, ensuring that resources are directed effectively to address the most critical areas. It aids in informed decision-making, efficient resource allocation, and achieving impactful results.

Considerations

1. **What do you already know about the problem you're targeting in this initiative?**
2. **How do you know there is a need?**
3. **What data or analysis already exists? Where are the gaps?**

Tips

You can use the Data Exploration Guide to support this process.

Equity Considerations can be addressed here in your process for DEI/Equity-hostile institutions or states.

See the Equity Considerations component for details.

Example

Let's identify what a needs assessment for PSU's myNextSteps project might have looked like to get to their Purpose Statement.

What do you already know about the problem you're targeting in this initiative?

Students currently lack a centralized resource for managing critical deadlines and next steps, particularly for enrollment, billing, and financial aid. This gap leads to missed deadlines, adversely affecting the institution's retention rates.

How do you know there is a need?

Surveys and feedback from student focus groups consistently highlight difficulties in managing business-related tasks due to fragmented information sources.

What data or analysis already exists? Where are the gaps?

Previous surveys provide insights into student frustrations, but detailed usage data on current resources is lacking. Further research is needed to understand specific user needs and behavior patterns.

– Equity Considerations

Equity considerations involve ensuring fairness and justice in allocating resources, opportunities, and treatment to address disparities and barriers individuals or groups face. These considerations aim to create an environment where everyone has the opportunity to succeed, regardless of their race, background, or circumstances.

Considerations

1. **How will this initiative promote diversity, equity, and inclusion within the student body and campus community?**
2. **Are you framing this from a strengths-based vs. deficit-based perspective?**
3. **How are you disaggregating your data and tracking different groups and equity gaps?**
4. **What data is needed to ensure you aren't exacerbating attainment gaps?**
5. **How do we account for intersectionality and intersectional experiences?**

6. ## How will we ensure historically excluded students benefit from this initiative?

7. ## What data or analysis already exists? Where are the gaps?

Tips

Think about implementation! Identify any equity-related challenges to the implementation of your initiative.

See the Resource—Data Types in the Data Use Toolkit for ideas on disaggregating data.

Example

Let's identify what equity considerations might have come up for PSU's myNextSteps project.

How will this initiative promote diversity, equity, and inclusion within the student body and campus community?

Accessibility: The mobile-friendly resource will be accessible to all students, including those with disabilities.

Equitable Access: Mobile access ensures that students without a personal computer can still use the resource.

Support for All Students: Students may come from backgrounds where assertiveness in institutional settings is not encouraged. This tool provides personalized, clear information, empowering students to manage their own deadlines and stay on track.

Are you framing this from a strengths-based vs. deficit-based perspective?

The initiative adopts a strengths-based perspective by leveraging students' need for streamlined information to enhance their overall academic experience.

How are you disaggregating your data and tracking different groups and equity gaps?

Data will be disaggregated by demographic groups to analyze usage patterns and identify any disparities in access or engagement, ensuring equitable support for all students.

What data is needed to ensure you aren't exacerbating attainment gaps?

Collecting baseline data on student engagement and retention rates to measure if the initiative addresses existing gaps or creates new ones.

How do we account for intersectionality and intersectional experiences?

The project will incorporate diverse student voices in the design process to address varying needs and barriers effectively. Focus groups and feedback sessions will include representatives from historically excluded groups to ensure their needs are specifically addressed.

– Research Overview

The research overview reviews and synthesizes existing research or institutional knowledge on a particular topic. It provides context for the current research by identifying what is already known, what gaps exist, and how the new research will build upon or challenge previous findings.

Considerations

Duplication of effort often occurs at institutions and wastes time and resources. It is always worthwhile to take some time to investigate what institutional knowledge you may not be aware of.

1. **Are there current or past (5-7 years) projects that have addressed similar problems at your institution?**
2. **Are there similar efforts at other institutions that can inform your initiative?**

Tips

As you think about existing or prior research at your institution, outline the findings to contextualize your effort.

List similar projects at other institutions, outline their findings, and assess their size and structure to evaluate the initiative's scalability and transferability.

Example

Here are potential resources PSU's project team might have considered before starting the myNextSteps project:

Previous Projects

Insights from past initiatives aimed at improving student communication tools, highlighting challenges and successful strategies.

Case Studies

Best practices and lessons learned from other universities that implemented similar mobile resources.

Institutional Reports

Analysis of internal reports on previous student support tools and their effectiveness.

Benchmarking Studies

Research on industry standards and successful models for mobile-friendly student resources.

User Feedback

Data and feedback from students regarding existing communication tools and their needs.

– Funding

Funding refers to the financial resources required to complete a project or initiative. It provides a detailed description of the budget, sources of funding, and financial management strategies.

Considerations

1. **How is your project or initiative being funded?**
2. **Are there other funding sources you have not considered?**
3. **Have you incorporated reporting requirements linked to funding into your practice and timeline?**

Tips

List the funding sources & types. (E.g., soft funding vs. categorical; recurring vs. non-recurring). This can help you identify gaps and better form a strategy for funding management.

Example

Let's consider what the Funding section for PSU's myNextSteps project might have looked like:

How is your project or initiative being funded?

Funding is secured through a combination of institutional grants and external sponsorships. PSU allocated $50,000 for this project, with an additional $30,000 secured from an external sponsor.

Are there other funding sources you have not considered?

Explore additional grant opportunities, such as federal education grants, and seek partnerships with tech companies experienced in education software. These collaborators can reduce costs by leveraging their existing knowledge of educational requirements, state laws, and restrictions. Some may also offer discounted rates or in-kind contributions due to the value of partnering with a university on a student success initiative.

Have you incorporated reporting requirements linked to funding into your practice and timeline?

The project plan includes milestones for financial reporting and compliance checks. For instance, quarterly financial reports are scheduled, and a comprehensive audit is planned six months after project launch to ensure alignment with funder requirements.

– Dependencies, Constraints, & Risks

Dependencies are the relationships between tasks or activities within the project or with external elements that affect the project's progress. They outline what needs to happen before a task can start or finish.

Constraints are limitations or restrictions that can affect the project's performance and delivery. They define the boundaries within which the project must operate.

Risks are potential events or conditions that could negatively impact the project. Identifying risks in advance helps to assess and plan for these uncertainties.

Considerations

1. **What are key dependencies, including human, technical, or cultural, that influence the project's success (directly or indirectly)?**
2. **What specific constraints, such as time, budget, or institutional policies, could impact the project?**
3. **What unforeseen risks or issues could hinder project success or have undermined similar initiatives at your institution in the past?**
4. **What are the risks of <u>not</u> doing the project to the institution's strategic goals?**
5. **Based on #1-4, what key conditions or actions will most significantly enhance the likelihood of success?**

Tips

Tap your institutional knowledge, both formal and informal, to identify risks that have derailed past efforts to help develop effective mitigation strategies.

Review the **Project Scope** and **Timeline** components to see how these dependencies, constraints, and risks may affect the overall project.

Focus on the most likely or impactful risks and constraints, and include mitigation strategies, like adding buffer time for potential delays.

Example

Let's explore some of the dependencies, risks and constraints PSU's myNextSteps project might have faced.

Dependencies

- Collaboration with IT Department for seamless integration with campus systems.
- Coordination with student support services to address student needs effectively.
- Compliance with funder reporting requirements and checks is necessary.
- Alignment with the academic calendar for implementation and testing during key periods.
- Ongoing feedback from students to refine the tool and address needs.

Constraints

- Budget limitations may restrict the development of advanced features, necessitating a focus on core functionalities.
- Time constraints could impact the timeline for user testing and feedback incorporation.

Risks

- Potential delays in software development could impact the project timeline and launch.
- Integration issues with existing systems might arise, affecting the tool's functionality and user experience.

Risks of Not Doing the Project

- Continued student dissatisfaction due to lack of centralized, accessible information may lead to lower retention rates.
- Missed opportunities to enhance student support and engagement with critical deadlines and tasks.

Success Conditions

- Establish clear communication channels and regular updates with all stakeholders.
- Define a realistic project scope and adhere to a well-structured timeline to ensure timely delivery and implementation.

– Project Timeline

A project timeline is a visual representation of a project's chronological sequence of tasks, milestones, and deliverables, typically displayed as a calendar, Gantt chart, or other time-based charts. It outlines when each activity should start and finish, providing a clear schedule for the entire project.

Considerations

1. **What are the phases of the project, and when will each begin and end?**
2. **What are key project milestones? When are deliverables expected?**
3. **How often will we assess our progress, and at what points in the project timeline?**

4 What warning signs/red flags should trigger a project re-start/redesign?

Tips

Consider your institution's academic calendar and the schedules of key stakeholders to create realistic timelines, including forecasting the time necessary for important feedback loops.

Explore existing tools and templates available at your institution to help with project management (e.g., Asana, Microsoft Teams, etc.).

Example

Let's explore potential core elements and milestones of the timeline for PSU's myNextSteps project.

1. Procurement and Buy-in

Time needed to find a development partner, receive an offer, secure budget approval, and finalize the contract through the institution's administration.

2. Software Development

Time allocated for defining the resource's requirements and for creating and building the software.

3. Testing and Refinement

Period for testing the software and making necessary adjustments.

4. Internal Training

Training staff on how to use and support the new resource.

5. Student Training

Educating students on how to access and use the resource effectively.

6. Piloting

Running a pilot program to gather initial feedback and make improvements.

7. Full Rollout

Launching the resource to the entire student body.

8. Monitoring

Ongoing observation of the resource's performance and user engagement.

9. Reporting

Regular updates on progress, usage metrics, and impact on student success.

– Key Stakeholders

A stakeholder has a vested interest in an initiative/project and can influence or be impacted by its objectives or outcomes (target group, institutional unit, etc.).

Considerations

1. **Have you considered the full breadth of potential stakeholders?**
2. **Which stakeholders are related to key communication, feedback, deliverables, and timeline elements of your initiative?**

Tips

Don't become complacent, assuming the same cast of stakeholders for every initiative. Be creative and include initiative-centric stakeholders.

You can use the Stakeholder Identification Guide section for guidance on who to include as key stakeholders for your project.

Example

Let's examine a possible overview of stakeholders that PSU's myNextSteps project might have utilized. The table provides an internal view of stakeholders, while the project charter may include a simplified list with only names and roles.

Stakeholder	Status	Functional & Individual Needs	Key Themes	Level of Information
Students	Impact Group	Easy-to-use tool, clear information, and personalized updates	Tool functionality, updates on deadlines	Detailed, User experience updates
Academic Advisors	Consulted/Informed	Information on how the tool supports student success and integrates with advising	Tool benefits for advising, usage insights	High-level, usage impact, feedback
Student Support Services	Necessary for Success	Alignment with student support strategies, integration with current support systems	Tool's role in student support, feedback	Detailed, implementation, and feedback
IT Department	Necessary for Success	Technical requirements for integration, support for troubleshooting	Integration process, technical issues	Detailed, technical and integration info
University Leadership	Informed	Project progress, budget, and impact on institutional goals	Budget, strategic impact, project status	High-level, budget updates, decisions
Funders/Sponsors	Consulted/Informed	Compliance with reporting requirements, project milestones	Financial reports, project progress	Detailed, budget, and compliance updates
Development Team	Necessary for Success	Clear project requirements, timeline, and feedback on progress	Development milestones, feedback	Detailed, technical requirements, and progress
Legal/Compliance Team	Consulted/Informed	Ensure the project adheres to legal and regulatory requirements.	Compliance issues, legal implications	Detailed, compliance and regulatory info
External Consultants	Consulted/Informed	Expertise on best practices, feedback on implementation	Best practices, tool effectiveness	High-level, expert recommendations

– Project Team Members & Roles

In a project team, various members assume specific roles, like a project manager or sponsor, to ensure the project is completed efficiently and effectively. Determining team roles up front helps clarify responsibilities and ensure accountability for team members.

Considerations

1. **Who will be part of the project team?**
Briefly describe their roles. You can use the [Team Management Toolkit] for more guidance.

2. **Link team roles to the initiative's communication, deliverables, and timeline expectations.**

Tips

Team members can come from disparate places, spanning departments and functional areas. Don't be afraid to reach across administrative boundaries.	Data and institutional research people can often enhance an initiative when brought in as full team members rather than kept as arms-length advisors.

Example

Here is an outline of potential team roles and responsibilities for PSU's myNextSteps project, along with the estimated capacity required for a 6-month timeline (an assumption made for the example). Keep in mind that some individuals may fulfill multiple roles and tasks.

Role	Description	Responsibilities	Link to Communication, Deliverables, & Timeline	Capacity Needed (6 Months)
Project Lead	Oversees the project, ensuring it stays on track and within scope	• Coordinate between teams • Manage project timeline and budget • Report to stakeholders	• Regular updates to stakeholders • Ensures deliverables are on schedule • Handles scope changes	• Full-time, 30-40 hours per week • Weekly or bi-weekly updates
UX/UI Designer	Designs the user interface and experience for the mobile resource	• Create wireframes and prototypes • Ensure accessibility and user-friendliness	• Provides design updates and feedback • Works closely with development team on implementation	• Part-time, 20-30 hours per week • Initial and final design phases, plus ongoing adjustments
Development Lead	Manages software development and integration of the mobile resource	• Oversee coding and technical aspects • Ensure integration with existing systems	• Communicates technical progress • Coordinates with IT for integration • Tracks development milestones	• Full-time, 30-40 hours per week • Regular coding sprints and integration phases
IT Support	Assists with technical integration and ensures compatibility with existing systems	• Support integration with campus systems • Troubleshoot technical issues	• Regular status reports on integration • Addresses technical issues promptly	• Part-time, 10-20 hours per week • Focus on integration and troubleshooting phases
Student Support Services Coordinator	Ensures the tool addresses student needs and gathers feedback for improvements	• Coordinate with students for feedback • Adjust tool based on needs	• Collects and reports student feedback • Ensures tool meets student requirements	• Part-time, approximately 10 hours per week • Ongoing feedback collection and adjustment
Content Specialist	Develops and maintains content to ensure it is relevant and accurate	• Create and update content for the resource • Ensure content accuracy	• Provides content updates • Coordinates with UX/UI designer for content placement	• Part-time, 10-20 hours per week • Content creation and regular updates
Communications Lead	Manages internal and external communication related to the project	• Develop communication plans • Update stakeholders on progress	• Regular updates to stakeholders • Manages announcements and project-related communications	• Part-time, approximately 10 hours per week • Regular communication and updates

– Project Resources

Project resources refer to the various assets required to complete a project successfully. Resources can be human (e.g., personnel, consultants), technical (e.g., IT), and physical (e.g., a meeting or activity space).

Considerations

1 What kinds of resources will this project need?

2 What resources do you already have access to?

Consider all the needed resources and where there might be gaps.

3 Where do you need to look or whom do you need to ask for help with additional resources?

Is the need human, physical, or technological?

Example

Let's review the possible resources required for PSU's myNextSteps project.

What kinds of resources will this project need?

- Human Resources: Refer to Team Members & Roles section
- Technical Resources: Software development tools, mobile development platforms, data analytics tools, and integration tools for existing campus systems
- Physical Resources: Meeting rooms for team coordination, testing devices (e.g., smartphones, tablets), feedback collection tools (e.g., surveys, focus groups)

What resources do you already have access to?

- Institutional IT support
- Preliminary budget for initial development
- Access to student feedback channels
- Existing student information systems

What are potential gaps?

- Specialized software development expertise for advanced features
- Additional funding sources for budget shortfalls
- Tools for comprehensive data analysis and disaggregation
- Enhanced support for accessibility and equity features

– Sustainability Plan

A sustainability plan ensures that a project's benefits are maintained long after completion by establishing ongoing maintenance, knowledge transfer, and integration into institutional policies while setting up long-term monitoring and evaluation to support continuous improvement.

Considerations

One of the biggest challenges in equity-centered student success initiative work is maintaining its impact after an initiative has been completed. As a core part of project planning, thinking through what happens afterward is critical to institutionalizing change.

1 What will the impact be on other institutional processes and systems and how can you ensure it integrates smoothly without disrupting current operations?

2. **What potential negative outcomes might arise, such as the exclusion of certain student groups or unintended complexities?**

3. **What criteria will determine whether the initiative continues or is discontinued? How can alignment with institutional goals influence these decisions?**

4. **Which team or department will be responsible for maintaining and improving the initiative after its completion?**

5. **How can you design post-initiative evaluation and continuous improvement to include monitoring, tracking and adjusting for impact on different communities to promote equity?**

6. **How will we ensure that historically excluded students benefit from this initiative?**

7. **How do you ensure accountability after the initiative so that it doesn't become stagnant?**

Example

To ensure the long-term success of the myNextSteps project, a comprehensive sustainability plan addresses relevant considerations. Here's a detailed overview based on the project's context:

Mitigating Impact on Institutional Processes

The integration of the myNextSteps tool with existing student information systems is designed to streamline student support while avoiding disruptions to current operations. This will be achieved by following the comprehensive implementation plan outlined in this charter (see Deliverables and Project Timeline components) agreed upon by all relevant stakeholders, ensuring alignment with IT department protocols and consultation with student support services to minimize process disruptions.

Potential Negative Outcomes

While one risk is the potential exclusion of students with limited digital access or those unfamiliar with the tool, we anticipate minimal impact due to the myNextSteps tool's mobile-friendly design. Furthermore, the university's provision of devices ensures broader access. Additional support channels and targeted outreach programs will be implemented to further address any remaining concerns and ensure that all students benefit from the initiative.

Criteria for Extension or Discontinuance

The tool's continuation will be evaluated based on specific performance metrics and alignment with institutional goals. The project may be discontinued if these goals are unmet and cannot be effectively addressed in the short term.

Evaluation Criteria:

- User Adoption: At least 60% of students use the tool in the first year after launch, with a target of increasing this adoption rate annually.
- Retention Impact: Demonstrate a rise in retention rates and disaggregate data to show the correlation between retention rates and tool usage within the student population, highlighting possible gaps and reduction of administrative load.
- User Satisfaction: Attain a satisfaction score of 75-85% among users in the first year.

Evaluation Process:

1. Monthly Updates: The Project Lead will provide regular updates to their Leadership team.
2. Quarterly Reports: Leadership will present these results to the President in quarterly reports, with additional meetings as necessary to prepare the Board.
3. Bi-annual Reviews: The President will communicate the outcomes and recommendations to the Board of Directors during bi-annual meetings. The board meeting discussing first year results is set to take place on MM/DD/YYYY.

Post-Initiative Evaluation and Continuous Improvement

The project team will establish an initial evaluation framework and baseline metrics. Following the launch, the Admissions team will take over, making necessary adjustments and managing ongoing assessments. This includes quarterly reviews and feedback collection from diverse student groups to ensure the tool's functionality meets all students' needs (to include sign-off from Head of Admissions).

Ongoing Operations

The Admissions department will assume responsibility for maintaining and improving the myNextSteps tool post-completion. This team will oversee updates, ensure the tool's alignment with evolving student needs, and manage the budget for ongoing support (to include sign-off from Head of Admissions).

Ensuring Benefits for Historically Excluded Students

Monitoring tools will be used to track engagement and outcomes for historically excluded student groups. Specific strategies, such as targeted outreach and tailored support, will be employed to ensure these students benefit from the initiative.

Ensuring Accountability

Human Resources & Implementation:

- For details on post-launch implementation and ownership of the initiative within the institution, refer to sections 3, 4, and 5.

Capacity and Roles:

- IT Support Team: Part-time capacity for ongoing technical support, including troubleshooting, system maintenance, and integration during peak periods.
- Tool Lead (Admissions Team): Part-time role overseeing monitoring, evaluation, communication, and reporting, with high capacity needs during reporting and evaluation periods.
- Admissions Team Member: Part-time role managing data updates and content, with increased involvement during data/content update phases.

Additional Considerations:

- Assess potential needs for additional resources, such as external consultants for specialized technical support or temporary staff during peak periods. This ensures comprehensive support for maintaining and enhancing the tool's effectiveness.