

IWR Project Charter

(WateReuse Research Foundation WRRF-12-03)

About the Project Charter

The IWR project charter is a combination game plan and play book designed to reflect a shared understanding among key stakeholders as to the project goals, objectives, and approach. It serves as a point of reference throughout the development, completion, and delivery of an industrial water reuse project.

What it does. The charter template contains a series of thought-provoking questions designed to generate information that is vital to the efficient completion of a successful project. This form has been developed based on best practice project management methodology. The aim here is to bring to the surface – from the outset – as many assumptions and potential issues as possible, to set clear expectations for the project outcome, and to establish effective lines of communications among project team members, decision makers, and other stakeholders. If or when any assumptions change throughout the course of the project, this document will serve as a reminder to communicate those changes.

Who should participate. Typically, water providers and water customers will contribute information to the charter, with a recommendation to complete it together as part of an initial planning session. There are no “right” or “wrong” answers to the questions posed in the charter, and some topics may not apply to a given project. Users are encouraged to adjust the level of detail according to the size, complexity, and strategic importance of their projects.

When and how to use. Anticipate that completing the charter for an average IWR project would be a half-day to full-day commitment, depending on the anticipated scope of the project and the number of participants. Some of the information can be filled out prior to the meeting to save valuable time; be sure to confirm answers with the customer. Use of a facilitator is recommended along with a designated “scribe” to capture and distill critical information into the project charter template. The initial draft is then cycled for review by the responsible team and may be revised to ensure that everyone involved has the same understanding. The revised charter is submitted to decision makers in the water customer and water provider organizations and/or the project integrator for final approval prior to project execution.

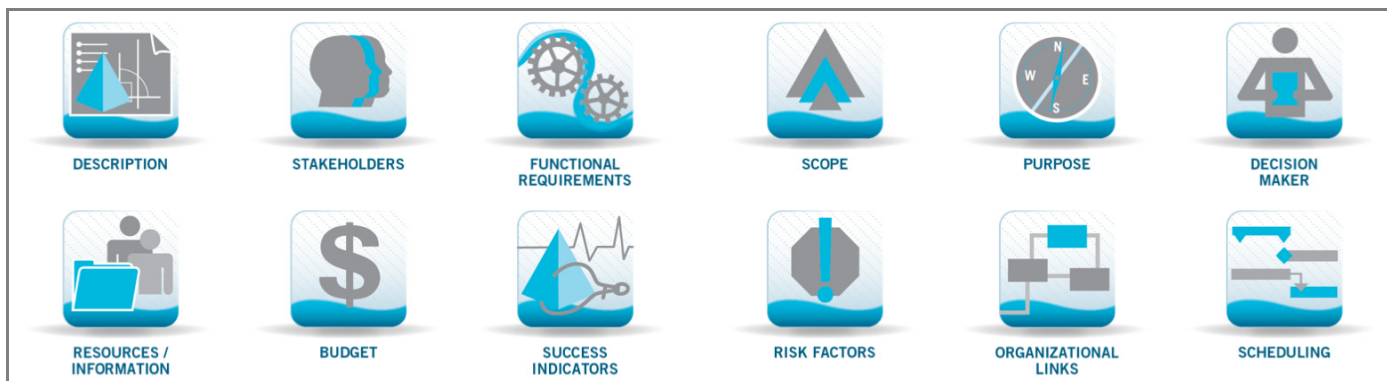
FOR QUESTIONS, CONTACT:

NAME:	
E-MAIL:	
PHONE:	

PROJECT ORGANIZATION(S):

CHARTER LEAD:	
CHARTER DATE:	

Project Charter Topic Areas



How To Use the Project Charter Template

Successful completion of every project begins with considering a broad range of key questions and surfacing critical details at the outset. Please review the thumbnail question for each of the charter and planning elements, and enter your project information in the accompanying text field. For items not applicable, just enter “NA” or similar; also feel free to add or delete topics as appropriate.



Description

Identify the nature or type of IWR application; e.g., cooling system, boiler system, process; type of plant or industry, location, etc.

Type text here...



Purpose

Identify the business reason for the project (i.e., project drivers, needs analysis). Describe how the project links to major strategies, objectives, and drivers.

Type text here...



Key Stakeholders

Identify for whom or by whom this project is being undertaken and other organizations/agencies/entities that will be involved, e.g., regulatory agencies, water district, plant operations, etc.

Type text here...



Decision Maker(s)

Specify for whom the project is being created and list others who eventually may be in the approval loop.

Type text here...



Functional Requirements

Identify in general terms what operating conditions the IWR solution must satisfy; e.g., demand and capacity, guaranteed quality range, etc.

Type text here...



Scope and Approach

List and describe in brief the major steps and activities involved in completing the project. For each of the major steps, estimate the amount of effort and time required.

Type text here...



Success Indicators

List the measures – business and operational – by which the project will be considered a success. Example metrics include amount of fresh water saved, cost factors, median flow rates, operability, etc.

Type text here...



Risk Factors

Identify any and all factors that could undermine the timely and cost-effective delivery of the project e.g., regulatory and compliance issues, resource availability and bandwidth, plant runtime, maintenance concerns.

Type text here...



Resources and Information

Identify the primary project contributors and potential additional resources or information needed to complete the project on time and within budget.

Type text here...



Organizational Links

Identify other organizations, departments or initiatives that are linked to this project for input and output.

Type text here...



Budget

Is there a designated budget for this project? Can an estimate be developed based on previous projects of similar scope and complexity? Also, consider funding and contributors.

Type text here...



Scheduling

Estimate start-to-finish cycle times with consideration given to simultaneous activities and potential critical timing issues. List milestone review and approval dates.

Type text here...



Core Project Team

The Core Team will include organizational leads and support personnel, contractor and vendor representatives, primary contacts for stakeholders, etc. To change any roles listed, click on text inside of cell to highlight and type in new designations. In addition, consider candidates for certain strategic functions and specialized skills that may be needed at various points.

Primary Role	Name	Contact Information
<i>(list roles appropriate to project team)</i>	<i>(insert team members, decision makers, etc.)</i>	<i>(email address and phone numbers)</i>
Project Manager/Integrator		
Champion/Sponsor		
Regulatory/Compliance Lead		
Plant Operations Representative		
Plant Maintenance Representative		
Technology Vendor		
E&C Contractors		

Other Project Contributors

Identify others who may be primary stakeholders or who may be involved at some point during the project based on their ability to provide necessary resources, information, reviews or approvals, organizational links or access, etc.

Primary Role	Name	Contact Information

Notes and Comments

Use this space to capture any uncategorized issues or information with potential bearing on project success.

Charter Review and Approval

A shared understanding of the elements of the project charter helps to ensure a solid foundation for a successful project and a rewarding experience for everyone involved in its development.

Water Provider Lead

Date

Water Customer Lead

Date