

10 Bakersfield Term Project Templates

The Bakersfield Term Project consists of 6 templates. The first four are provided within this file. The last two are the budget template from Part II and project status templates from Part III which are generated from the Microsoft Project program with the values automatically entered. Students simply print out the spreadsheet portion of the schedule with the appropriate headings for the budget template and select appropriate template reports for the status report templates.

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Project Charter Template Page 1

Project Name: _____

Start Date: _____

Target End Date: _____

Leadership Team Core Participants

Participating Co.	Sponsor/Job Title	Project Manager

Additional Leadership Team Participants

[illegible]

Tentative Project Team Structure

Project Charter Template Page 2**Project Name:** _____

Mission

Goals

Scope

**Summary
Milestone
Schedule**

(Note to Students: Refer to the initial schedule Gantt developed in Part I to identify key milestones for this part of the Project Charter)

**Summary
Budget**

**User Acceptance
Criteria/Quality**

**Major
Risks**

APPROVALS

Company/Sponsor	Approval Signature	Date

Communication Plan Template

VERBAL COMMUNICATION				
WHAT	WHEN	WHERE	OWNER	ATTENDEES
Type of Meeting	Frequency (Day/time)	Meeting Location	Meeting Owner	Project Team Members (it is good to identify them by role or title if possible)

WRITTEN COMMUNICATION				
WHAT	WHEN	METHOD OF DELIVERY	SENDER	RECEIVER
Type of Communication	Frequency Day (if applicable)	Electronic? Paper?	Person or Group responsible for sending	Person or Group who receives the information

EXAMPLE OF A COMMUNICATION PLAN:

The communication plan should be no more than one or two pages long and contain at least 10 entries. This document outlines the partial plan of communication for the XYZ Project Team as an example of how the charts are filled out. The charts on pages 88 through 91 of the text *Multi-company Project Management* should provide plenty of ideas.

VERBAL COMMUNICATION				
WHAT	WHEN	WHERE	OWNER	ATTENDEES
Status Meeting	Every 2 weeks Monday 10-noon	Project Site Work Trailer	Project Manager	XYZ Project Team
Called Meetings	As Needed	TBD	Person who calls & leads meeting	To Be Determined

WRITTEN COMMUNICATION				
WHAT	DUE WHEN	METHOD OF DELIVERY	SENDER	RECEIVER
Meeting Minutes	2 days after the meeting	Website	Note Taker	All participants
Meeting Agenda	2 days before a meeting	EMAIL	Meeting Facilitator	All meeting participants
Status Reports to Project Manager	Weekly Tuesday By noon	Paper Copy	Team Members	Project Manager

Scope Statement Template**Statement of Work****Project Name:** _____**Project Phase** _____

Scope(Project
Description in
more detail)

**Acceptance
Criteria**

(Greater Detail)

Deliverables(Includes
Ancillary Items)

Exclusions(Items out of
Scope)

Constraints(Schedule,
Cost, and
Others)

Assumptions(Include impact
if false)

Risk Management Matrix Template

Identification		Assessment		Response Plan		
Risk	Consequence	Probability (L, M, H)	Severity (L, M, H)	Action Trigger	Resp.	Response Plan