**ADVANCED PROJECT CHARTER FORM EXAMPLE**

GENERAL PROJECT INFORMATION

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| PROJECT NAME | PROJECT MANAGER | PROJECT SPONSOR |
| Positive Charge EMV Station Installations  | Jane Matthews | Jill DeGrassio |
| EMAIL | PHONE | ORGANIZATIONAL UNIT(S) |
| jane.matthews@positivecharge.com | 000-000-0000 | Field Engineering, Operations, and Project Management  |
| EXPECTED SAVINGS | ESTIMATED COSTS |  | EXPECTED START DATE | EXPECTED COMPLETION DATE |
| $897,654 | $453,218 |  | 02/19/20XX | 11/30/20XX |

PROJECT OVERVIEW

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| PROBLEM OR ISSUE  | Our goal for this project is to install 1,125 EV charging stations at 116 locations across the US, Mexico, and Canada to accommodate malls' and service stations' EV-charging needs.  |
| PURPOSE OF PROJECT | The implementation of the 1,125 EV charging stations will reduce fossil-fuel emissions and have a positive impact on the environment. This will help fulfill Positive Charge's mission of being the world's largest EV-charging provider and reduce the environmental impact of fossil-fuel cars through our services.  |
| BUSINESS CASE | As EVs become more prevalent, more EV-charging stations are needed to accommodate EV drivers' charging needs. The implementation of the 1,125 EV charging stations at 116 locations across the US, Mexico, and Canada to accommodate malls' and service stations' EV-charging "traffic" will reduce the lengths to which EV drivers would have to travel for their next charge. The implementation of the EV-charging stations will also result in a 24% profit for Positive Charge.  |
| GOALS / METRICS | The project goal is to install 1,125 EV charging stations at 116 locations across the US, Mexico and Canada. The metrics used to measure success will primarily be the following key performance indicators (KPIs): Revenue Growth, Client Retention Rate, and Customer Satisfaction.  |
| EXPECTED DELIVERABLES | Install 1,125 EV charging stations at 116 locations across the US, Mexico, and Canada to accommodate malls' and service stations' EV-charging needs.  |

PROJECT SCOPE

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| WITHIN SCOPE | Operations engineers, project managers and field implementation engineers will work with third-party client site personnel to install 1,125 EV charging stations at 116 locations across the US, Mexico, and Canada.  |
| OUTSIDE OF SCOPE | Positive Charge is not responsible for third-party / client’s locations preparatory work (e.g., permits for digging, city region electricity-availability logistics, etc.). However, Positive Charge project managers can provide clients with a checklist to ensure their locations are adequately prepared for the installation of our EV charging stations.  |

TENTATIVE SCHEDULE

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| **KEY MILESTONE** | **START** | **FINISH** |
| Form Project Team / Preliminary Review / Scope | 12/05/20XX | 01/11/20XX |
| Finalize Project Plan / Charter / Kick Off | 12/06/20XX | 02/01/20XX |
| Define Phase | 12/07/20XX | 02/02/20XX |
| Measurement Phase | 12/08/20XX | 02/10/20XX |
| Analysis Phase | 12/09/20XX | 02/26/20XX |
| Improvement Phase | 01/10/20XX | 03/10/20XX |
| Control Phase | 02/08/20XX | 03/08/20XX |
| Project Summary Report and Close Out | 04/23/20XX | 06/23/20XX |

RESOURCES

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| PROJECT TEAM | Janine Remagio - Project Manager David Coen - Chief Engineer Rita Preze - CFO  | Lisa Jones - QA Director Donald Smythe - Field Engineer |
| SUPPORT RESOURCES | Operations, Sales, Project Management, Engineering  |
| SPECIAL NEEDS | TBD |

COSTS

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| --- | --- | --- | --- | --- |
| **COST TYPE** | **VENDOR / LABOR NAMES** | **RATE** | **QTY** | **AMOUNT** |
| **Labor** | Electro Charge Logistics, Inc.  | $78.00 | 200 | $15,600.00 |
| **Labor** | Level 1 EVS | $46.00 | 100 | $4,600.00 |
| **Labor** | Level 2 EVS | $58.00 | 50 | $2,900.00 |
| **Labor** | EVC Fast Chargers | $85,000.00 | 1 | $85,000.00 |
| **Labor** | Battery Vendor | $79,879.00 | 3 | $239,637.00 |
| **Supplies** | Power Conversion System Vendor | $68,686.00 | 1 | $68,686.00 |
| **Miscellaneous** | Third-Party Software | $68,768.00 | 0 | $ – |
|  |   |   | TOTAL COSTS | $416,423.00 |

BENEFITS AND CUSTOMERS

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| --- | --- |
| PROCESS OWNER | Jane Matthews - Project Manager  |
| KEY STAKEHOLDERS | Jill DeGrassio |
| FINAL CUSTOMER | 116 clients across the US, Mexico, and Canada (see attached client list).  |
| EXPECTED BENEFITS | The implementation of the 1,125 EV charging stations at 116 locations across the US, Mexico, and Canada to accommodate malls' and service stations' EV-charging "traffic" will reduce the lengths to which EV drivers would have to travel for their next charge. The implementation of the EV-charging stations will also result in a 24% profit for Positive Charge.  |
|   |   |   |   |   |   |
| **TYPE OF BENEFIT** | **BASIS OF ESTIMATE** | **ESTIMATED BENEFIT AMOUNT** |
| **Specific Cost Savings** | Estimator’s projections  |  $25,000.00  |
| **Enhanced Revenues** | Finance's projections |  $92,500.00  |
| **Higher Productivity (Soft)** | Project management's estimations  |  $17,500.00  |
| **Improved Compliance** | Operations' estimations  |  $12,000.00  |
| **Better Decision Making** | Project management's estimations  |  $18,500.00  |
| **Less Maintenance** | Project management's estimations  |  $26,000.00  |
| **Other Costs Avoided** | Finance's projections |  $46,250.00  |
|   |   |   | TOTAL BENEFIT |  $237,750.00  |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

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| RISKS | Though contract is signed, Operations still does not have approval for installation from cities of Denver and Yuma. Project management to work with both cities to ensure proper permitting, etc. in time for scheduled installations.  |
| CONSTRAINTS | We have to "backfill" some key project management and field engineer positions to ensure we have people "on the ground" to manage EV stations' implementation.  |
| ASSUMPTIONS | We assume that all permits for installation of EV-charging stations will be provided by clients by time of implementation.  |
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|   |   |   |   |   |   |
| PREPARED BY | TITLE | DATE |
| Jane Matthews | Senior Project Manager | 04/22/20XX |

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