**PROJECT CHARTER**

Guidelines and Best Practices:

This form is for use on projects **OVER $2M**.

The Planning & Projects Planner or Project Manager is responsible for filling out this form and submitting it along with the PEF for the preliminary planning fund and the full funding requests. It is best practice to reissue the form when the project scope, budget, funding, key project members, or communication plan has changed.

If the project is jointly funded or managed by BJH or SLCH, the [Joint Approval Form](https://facilities.med.wustl.edu/app/uploads/2025/02/Joint-Approval-Form_rev-02.11.25.xlsx) with appropriate signatures is also required.

The Planner/PM/Project Coordinator will distribute this document to the applicable Integrated Campus Planning & Operational Services project support team members and departmental contacts.

The PM/Planner should summarize the project intention in the ***Project Purpose and Mission & Vision*** section, including the strategic objective that ties back to the current departmental planning. It is a best practice for projects of this size and scale to have a mission, vision, key project goals, and critical success factors.

The ***Project Scope*** section should include a detailed description of the project requirements and specific exclusions.

If any projects or activities are required before this project can begin, please mention them and the estimated substantial completion date in the ***Enabling Projects*** section.

If the project is Dean-funded, include Rick Stanton as a ***Key Stakeholder***. Regardless of the funding source, include Melissa in this section of the Project Charter.

Under the ***Integrated Campus Planning and Operational Services*** section, the PM/Planner should revise to include the applicable integrated planning and project team members.

It is recommended that the PM/Planner collaborate with Mariah Harris to draft a ***Communication Plan*** that includes internal and external project status updates.

Date:

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| 1 | General Project Information | |
| Project Name | |  | |
| Project Number | |  | |
| Project NASF | |  | |
| Building Name | |  | |
| Building Floors/Rooms | |  | |
| Building Address | |  | |
| Building Ownership | |  | |

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| 2 | Project Purpose and Mission & Vision |
| Purpose of Project | |
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| Mission & Vision | |
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| 3 | Key Project Goals & Critical Success Factors |
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| 4 | Project Programming | | |
| Planner Assignment | |  | |
|  | | The project is **NASF** and includes the following: | |
| **Space Type** | **NASF** |
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| **TOTAL** |  |

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| 5 | Project Scope |
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| Exclusions | |
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| 6 | Enabling Projects |
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| 7 | WUSM Planning & Projects Team | | | | |
| Functional Area | | Team Member | Phone | Email | Title |
| Project Manager | |  |  |  |  |
| Project/Dept. Planner | |  |  |  |  |
| Project Coordinator | |  |  |  |  |
| Project Accountant | |  |  |  |  |
| Project Contracts | |  |  |  |  |
| Project Space Relocation Planner | |  |  |  |  |

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| 8 | BJC/H or SLCH Project Team (joint project) | | | | |
| Functional Area | | Team Member | Phone | Email | Title |
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| 9 | Key Stakeholders | | | | |
| Name | | Role | Phone | Email | Title | |
| Rick Stanton | | Finance, WUSM | 314-362-1218 | richard.stanton@wustl.edu | Vice Chancellor Medical Finance & Administration | |
| Melissa Rockwell- Hopkins | | Planning/Design, Facilities, WUSM | 314-362-4970 | hopkinsm@wustl.edu | Associate Vice-Chancellor, Associate Dean of Operations and Facilities Management | |
|  | | Department Head |  |  |  | |
|  | | Department Business Manager |  |  |  | |

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| 10 | Other Department Contacts | | | | |
| Department | | Name | Phone | Email | Title | |
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| 11 | Integrated Campus Planning & Operational Services | | | | |
| Functional Area | | Name | Phone | Email | Title | |
| Planning & Projects Team Lead | |  |  |  |  | |
| Planning & Projects  Sr. Director | | Elizabeth Kohl | 314-273-0385 | elizabeth.kohl@wustl.edu | Senior Director Campus Planning | |
| Planning & Projects  Relocation & Interiors | | Hannah Jefferies | 314-273-0386 | hannah.jefferies@wustl.edu | Director, Interiors and Relocation Planning | |
| Facilities Engineering | | Mark Hume | 314-362-3095 | humem@wustl.edu | Senior Director Facilities Engineering | |
| Facilities Engineering | | Jeff Shimek | 314-273-4977 | schimek@wustl.edu | Campus Engineer, Sr. Project Manager | |
| Building Technician | |  |  |  |  | |
| Environmental Services | | Mario Turner | 314-273-1375 | turnerlc@wustl.edu | Director Facilities Operations Custodial | |
| Transportation & Parking | | Michelle Lewis | 314-362-0214 | lewismichelle@wustl.edu | Director Transportation, Parking & Administration | |
| Key Shop/Access Control | | Mary Lamar  Justin Orrick | 314-362-4813  314-747-2340 | marylamar@wustl.edu  justin.orrick@wustl.edu | Manager Physical Security  Team Lead Senior PM | |
| Landscape & Public Realm | | Allan Miller | 314-362-9275 | allan.miller@wustl.edu | Project Manager Civil & Landscape | |
| Real Estate | | Ryan Haas | 314-747-3214 | ryanhaas@wustl.edu | Planner I | |
| Furniture & Design | | Audrey Metz | 314-935-4812 | audreymetz@wustl.edu | Manager of Furniture & Design | |
| EH&S – Occupational Safety | | Brad King | 314-273-4567 | kingb@wustl.edu | Director Office of Occupational Safety | |
| EH&S – Biological Safety | | Susan Cook | 314-747-0309 | shcook@wustl.edu | Director Office of Biological Safety | |
| EH&S – Chemical Safety | | Angela Dartt | 314-273-1288 | adartt@wustl.edu | Director Office of Chemical Safety | |
| EH&S – Environmental Safety | | Linda Vishino | 314-273-4568 | vishinol@wustl.edu | Director Office of Environmental Compliance | |
| EH&S – Radiation Safety | | Dan Doenges | n/a | daniel.doenges@wustl.edu | Director – Division of Radiation Safety | |
| BJC Infection Control | | Misha Foster | n/a | misha.foster@bjc.org | Infection Prevention Lead | |
| DCM | | Dr. Ken Boschert | 314-362-3773 | boschertk@wustl.edu | Senior Associate Director DCM (Veterinarian) | |
| TFC | | Michael Leyden | 314-747-4969 | michael.leyden@bjc.org | Manager, Delivery & Implementation | |
| WU-IT | | Lee Rouse | 314-935-1178 | rousel@wustl.edu | Manager, Network Engineering | |
| WU-AV | | Boyd Pickup  Tony Phillips | n/a  n/a | boyd.p@wustl.edu  phillips.a@wustl.edu | Director Audio Visual, Media Services and Event Production | |
| DAS Systems (BJC) | | Renne Brewer | n/a | renne.brewer@bjc.org | Project Manager Technology | |

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| 12 | Project Neighbors, Community, and Impacted Departments | | | | |
| Department | | Name | Phone | Email | Title | |
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| 13 | Architect, Engineering, and Other Consultants | | | | |
| Consultant/Company Name | | Name | Phone | Email | Title | |
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| 14 | Contractors | | | | |
| Contractor/Company Name | | Name | Phone | Email | Title | |
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| 15 | Targeted Schedule | |
| Milestones | | Target Dates |
| Programming | |  |
| Planning | |  |
| Design | |  |
| Construction | |  |
| Substantial Completion | |  |
| Activation | |  |
| Relocation/Move | |  |
| Occupancy | |  |
| Administrative Close-out | |  |

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| 16 | Budget | |
| Project Phase | | Budget Breakdown |
| Site Assessment | |  |
| Pre-Planning/Programming | |  |
| Design | |  |
| Construction | |  |
| Owner Directs | |  |
| Total Project Cost | |  |
| Total Project Budget | |  |

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| 17 | Funding Source(s) |
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| 18 | Project Delivery Method | |
| Project Delivery Method | |  |
| Project Consulting Teams to Consider | |  |
| Selection Process (RFP, RFQ, Other) | |  |
| Selection Team Members | |  |
| Selection Time Frame | |  |

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| 19 | Risk Management | |
| Identified Risks | |  |
| Likelihood/Impact | |  |
| Mitigation Strategy | |  |

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| 20 | Approvals | |
| Planning Funds Request Dates | |  |
| Project Committee Approval Dates | |  |
| Project Funding Approval Dates by Entity | |  |
| Regulatory Approvals | |  |
| Building Permits Required | |  |
| Occupancy & Licensure Approval | |  |

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| 21 | Communication Plan | |
| Communication Plan | |  |
| Frequency | |  |
| Identified Recipients | |  |
| Primary Department Contact | |  |
| Primary Planning & Projects Contact | |  |

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| 22 | Notes |
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