**Work Summary/Proposal**

**Client:**

**Focus contact:**

**Date of initial meeting:**

# **Section 1 – Initial Scoping**

## BACKGROUND/CONTEXT

## PURPOSE OF THE WORK/PROBLEM (consider 5W1H)

## OBJECTIVES

## 

## STRUCTURE (*Outline of Potential Activities, Approach or Deliverables)*

### *KEY STAKEHOLDERS*

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Dept/team | Involvement |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## TIMING FOR POTENTIAL WORK – (KEY DATES TO BE AWARE OF)

## ANY DEPENDENCIES, CONSTRAINTS, OUT OF SCOPE AREAS

# **Section 2 – Reporting *(to be completed for work that does not require Charter)***

## DELIVERABLES/OUTPUTS

|  |  |  |  |
| --- | --- | --- | --- |
| Deliverables | Update on progress | Target Date | RAG |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## RISKS & ISSUES

|  |  |
| --- | --- |
| **RISKS** | |
| **Description**  Include: event, cause & consequence | **Risk Response (SMART)**  Start each statement with either Mitigate, Tolerate or Escalate |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **ISSUES** | |
| **Description**  Include: event, cause & consequence | **Issue Response (SMART)**  Start each statement with either Mitigate, Tolerate or Escalate |
|  |  |
|  |  |
|  |  |

# **Section 3**

## CHALLENGES AND HOW THESE WERE ADDRESSED

## BENEFITS

## OUTSTANDING ACTIONS

## DISCOVERIES

## NEXT STEPS FOR FOCUS

**APPENDICES:**

1. **VERSION CONTROL**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Purpose/Change | Date | Author |
| 0.1 |  |  |  |
| 0.2 |  |  |  |