[](https://www.smartsheet.com/try-it?trp=8556&utm_source=integrated+content&utm_campaign=/blog/project-charter-templates-and-guidelines-every-business-need&utm_medium=Project+Charter+with+Example+Data++8556&lpa=Project+Charter+with+Example+Data++8556&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)**PROJECT CHARTER TEMPLATE WITH EXAMPLE DATA**

GENERAL PROJECT INFORMATION

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| PROJECT NAME | | | PROJECT MANAGER | PROJECT SPONSOR |
| Intellectual RAG-System for Universities | | | Polina Alekseeva, Sofia Zemskova | Tibor Kovács |
| EMAIL | | PHONE | ORGANIZATIONAL UNIT(S) | |
| none | | none | Computer Science Department, Educational Technology Unit | |
| GREEN BELTS ASSIGNED |  |  | EXPECTED START DATE | EXPECTED COMPLETION DATE |
| Polina Alekseeva, Sofia Zemskova | | | 02/18/2025 | 05/20/2025 |
| BLACK BELTS ASSIGNED |  |  | EXPECTED SAVINGS | ESTIMATED COSTS |
| Polina Alekseeva, Sofia Zemskova | | | $3,450 | $4,700 |

PROJECT OVERVIEW

|  |  |
| --- | --- |
| PROBLEM  OR ISSUE | During lectures, many students struggle to get timely clarification on course material due to time constraints or hesitation to ask questions, while teachers are overloaded with answering individual queries. In addition, educational content is dispersed over multiple files, making it difficult to quickly locate accurate information. |
| PURPOSE OF PROJECT | Develop an intelligent assistant based on Retrieval-Augmented Generation (RAG) that processes and indexes course materials. Students can ask questions via a chatbot, and the system will extract the most relevant content and provide accurate, concise answers 24/7—supporting learning without needing immediate teacher intervention. |
| BUSINESS CASE | By automating the retrieval of precise course content:  Students benefit from immediate, accurate answers, improving understanding and reducing search time.  Teachers can focus on instruction rather than repetitive queries.  Universities gain an innovative tool that enhances education quality and can be offered as an additional service or even licensed to other institutions. |
| GOALS / METRICS | Achieve over 90% response accuracy using only uploaded materials.  Reduce teacher query load by an estimated 40%.  Increase student satisfaction (e.g., a 25% improvement in survey feedback).  Track system usage (number of queries answered, average response time, etc.). |
| EXPECTED DELIVERABLES | A fully functional chatbot integrated with the RAG system.  A backend for processing and indexing uploaded course materials.  Modules for integrating with Learning Management Systems (LMS) such as Moodle.  An analytics dashboard for tracking performance and feedback. |

PROJECT SCOPE

|  |  |
| --- | --- |
| WITHIN SCOPE | Development of the AI-powered assistant using the RAG method.  Design and implementation of a user-friendly chatbot interface.  Establishment of filtering, ranking, and feedback loops to improve answer quality over time.  Pilot testing with selected lectures to validate functionality. |
| OUTSIDE OF SCOPE | Creation or modification of the core course content.  Academic tutoring or advising beyond information retrieval from the provided materials.  Integration with external data sources.  Customization for every department beyond an initial standard version. |

TENTATIVE SCHEDULE

|  |  |  |
| --- | --- | --- |
| **KEY MILESTONE** | **START** | **FINISH** |
| Form Project Team & Preliminary Review | 02/18/2025 | 02/22/2025 |
| Finalize Project Plan, Charter & Kick-Off | 02/22/2025 | 03/03/2025 |
| Requirements Gathering & Define Phase | 03/03/2025 | 03/10/2025 |
| Development & Measurement Phase | 03/10/2025 | 04/14/2025 |
| Testing & Analysis Phase | 04/14/2025 | 04/28/2025 |
| Improvement & Control Phase | 04/28/2025 | 05/12/2025 |
| Project Summary Report & Close Out | 05/12/2025 | 05/20/2025 |

RESOURCES

|  |  |  |
| --- | --- | --- |
| PROJECT TEAM | Project Managers: Polina Alekseeva, Sofia Zemskova  Lead Developers: Polina Alekseeva, Sofia Zemskova  Data Scientist/ML Engineer: Sofia Zemskova  UI/UX Designer: Polina Alekseeva  QA Engineers: Polina Alekseeva, Sofia Zemskova |  |
| SUPPORT RESOURCES | Faculty advisors from the University’s IT and Educational Departments.  Access to computing resources (cloud credits, API licenses for LLM services, etc.). | |
| SPECIAL NEEDS | Secure and reliable access to course materials.  Open-source model access.  A robust feedback to refine AI responses continuously. | |

COSTS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **COST TYPE** | **VENDOR / LABOR NAMES** | | **RATE** | **QTY** | **AMOUNT** |
| **API key** | AI/ML API | | 200$ | 1 | $200 |
| **Development** | In-house | | 10$ | 150 | $1500 |
| **Miscellaneous** | Third-Party Software, hardware | | $3,000 | 1 | $3000 |
|  |  |  | TOTAL COSTS | | $4,700 |

BENEFITS AND CUSTOMERS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| PROCESS OWNER | Project Managers: Polina Alekseeva, Sofia Zemskova | | | | |
| KEY STAKEHOLDERS | University Administration  Faculty/Teachers  Students | | | | |
| FINAL CUSTOMER | The entire university community, including both students and teaching staff. | | | | |
| EXPECTED BENEFITS | Enhanced student learning outcomes through immediate access to accurate answers.  Reduced repetitive workload for teachers, allowing them to focus on in-depth instruction.  Operational efficiency gains by streamlining information retrieval.  Potential additional revenue if the system is licensed to other institutions. | | | | |
|  |  |  |  |  |  |
| **TYPE OF BENEFIT** | **BASIS OF ESTIMATE** | | | | **ESTIMATED BENEFIT AMOUNT** |
| **Time Savings** | 1 hr/day saved over 50 days at $40/hr | | | | $2,000 per semester |
| **Enhanced Learning Outcomes** | Reduced remedial sessions (5 sessions × $50) | | | | $250 per semester |
| **Increased Engagement** | Fewer dropouts/lower support costs based on feedback and surveys | | | | $200 per semester |
| **Operational Efficiency** | Savings from automation reducing admin workload (approx. 0.5 FTE) | | | | $1,000 per semester |
|  |  |  | TOTAL BENEFIT | | $3,450 |

RISKS, CONSTRAINTS, AND ASSUMPTIONS

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| RISKS | AI-generated responses may sometimes be inaccurate if course material is ambiguous.  Technical challenges with integrating diverse file formats and data sources.  Potential resistance from faculty or students accustomed to traditional methods.  Dependence on the quality and completeness of the uploaded materials. | | | | | |
| CONSTRAINTS | Limited budget and resources typically available for student projects.  Project timeline might be affected by academic calendar constraints.  Data privacy and security regulations regarding academic materials. | | | | | |
| ASSUMPTIONS | Teachers will continuously update and provide comprehensive course materials.  Students will adopt and actively use the system for their queries.  The existing university IT infrastructure will support the necessary integrations and data storage.  Adequate funding and technical support will be secured for the project. | | | | | |
|  | |  |  |  |  |  |
|  | |  |  |  |  |  |
| PREPARED BY | | TITLE | | | | DATE |
| Polina Alekseeva,  Sofia Zemskova | | Senior Project Managers | | | | 02/25/2025 |

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