**[Project Name] Management and Governance Roles Plan**

Table of Contents

[Management and Governance Structure 2](#_Toc56502365)

[Description of Individual Management Roles 2](#_Toc56502366)

[Project Director (insert name) 2](#_Toc56502367)

[Activity Leaders (insert name/s) 2](#_Toc56502368)

[Project Manager (insert name) 2](#_Toc56502369)

[Other Roles 3](#_Toc56502370)

[Co-Applicants 3](#_Toc56502371)

[Collaborators 3](#_Toc56502372)

[Partner Organizations 3](#_Toc56502373)

[Committees 3](#_Toc56502374)

[Committee Name 3](#_Toc56502375)

[Committee Name 3](#_Toc56502376)

[Meetings Matrix 4](#_Toc56502377)

[Budget Management 4](#_Toc56502378)

# Management and Governance Structure

* *Describe general management and governance structure*
* *Insert organizational charts*

# Description of Individual Management Roles

## Project Director (insert name)

* *Insert responsibilities, such as the following:*
* *Provides project leadership and oversight.*
* *Is ultimately responsible for successful project completion in compliance with funder requirements.*
* *Ensures that the project is carried out in accordance with co-applicant/collaborator/partner agreements.*
* *Manages Project Manager/Project Coordinator/list other roles managed.*
* *Meets with the Project Manager quarterly and/or as needed.*
* *Provides oversight for project committees and meetings.*
* *Oversees technical reporting.*
* *Serves as the liaison with external funding partners.*

## Activity Leaders (insert name/s)

* *Insert responsibilities*

## Project Manager (insert name)

The Project Manager is responsible for the overall management of the project. The following are the project manager’s primary responsibilities.

* *Insert responsibilities; see Project Initiation Form Scope Pick List for ideas (*<http://www.sfu.ca/research/sites/default/files/2020-09/Sample%20PIF%20Scope%20List.docx>)
* *Potentially categorize responsibilities as follows:*
  + *Project Administration General*
  + *Budget and Schedule Management*
  + *Stakeholder Communication and Coordination*
  + *Risk Management*

## Other Roles

The roles of the following groups are quite broad, and so we have not attempted to fully define the roles in this document. However, we have identified how the following parties interface with the governance and management components of the project.

### Co-Applicants

### Collaborators

### Partner Organizations

# Committees

|  |  |
| --- | --- |
| Committee Name | |
| **Purpose** |  |
| **Members** |  |
| **Reports to** |  |
| **Frequency** |  |
| **Coordinated by** |  |
| **Responsibilities** |  |
| **Notes** |  |

|  |  |
| --- | --- |
| Committee Name | |
| **Purpose** |  |
| **Members** |  |
| **Reports to** |  |
| **Frequency** |  |
| **Coordinated by** |  |
| **Responsibilities** |  |
| **Notes** |  |

# Meetings Matrix

| **Frequency** | **Group** |
| --- | --- |
| **Bi-weekly** |  |
| **Monthly** |  |
| **Quarterly** |  |
| **Annually** |  |
| **Other** |  |

# Budget Management

Research accounts are monitored via the following methods:

1. *Insert who is involved with budget management, such as laboratory managers, activity leaders, the project manager, and the institution’s financial services offices*