



Charter Template

I. Introduction

Economy, Energy, and Environment (E3) is a coordinated federal and local initiative providing small and medium-sized manufacturers with lean, clean, energy, and greenhouse gas (GHG) assessments. E3 assessments are helping the industrial sector to adapt and thrive in a business era focused on sustainability.

This charter formalizes the details of the E3: [project location] pilot project. Public and private-sector organizations participating in these assessments include:

- U.S. Environmental Protection Agency (EPA), Green Suppliers Network (GSN), and Climate Leaders Program
- U.S. Department of Energy (DOE), Save Energy Now Leaders Program
- U.S. Department of Labor (DOL), Employment and Training Administration (ETA)
- U.S. Department of Commerce (DOC), National Institute for Standards and Technology (NIST), Manufacturing Extension Partnership (MEP)
- Small Business Administration (SBA)
- [List other state and local participants. Attach a short description of each state and local organization as an addendum to the charter.]

Each project is unique, and E3 service providers will tailor their assessments to meet the needs of the [project location] project. This document presents the project background, participant expectations, project goals, technical services, tools and resources, management strategy, communication strategy, roles and responsibilities, schedule of activities, leveraged resources, and terms and conditions for the E3: [project location] project.

II. Project Background

Following is a description of the project history, capacity, and target areas for E3: [project location].

- History**
[Insert description of the history of this project, e.g., how and why the project location was identified.]
- Capacity**
[Describe the capabilities of the project participants to support E3 activities, e.g., capabilities and capacity of local technical assistance organizations or access to resources.]
- Targeted Areas**
[List the target areas for this project. If appropriate, attach a map of the areas as an addendum to the charter.]

III. E3: [Project Location] Goals

All E3 projects are focused on achieving the following four overarching goals:

- Increase energy efficiency and sustainability
- Provide valuable technical training, assessments, and support
- Improve profitability of the local economy
- Enable growth
- Create and retain manufacturing jobs

A description of each partner's expectations and established goals for the E3: [project location] project are provided below:

A. Partner Expectations

[List each project partner, their organizational representatives and titles, and organizational goals for the specific project.]

B. Project Goals

[List the agreed-upon goals for this project.]

IV. E3 Technical Services

The following section describes specific technical services to be delivered by this E3 project:

A. Technical Assessment Process (Lean, Environment, Energy and Carbon)

[Summarize the general approach for the assessment (e.g. number of phases and steps), then describe each phase or step.]

B. Implementation Support and Resources

[Reference the connection with local SBA affiliates and establishment of Revolving Loan Fund. Include other state or local resources as appropriate]

C. Continuous Improvement

[Describe any workforce development or 'green' skills training that will be provided. Include any other activities that support development of E3 capabilities.]

D. Other Services Offered

[Summarize other services that are not offered at the national level. Describe other services and organization at the state and local level that will be offered as part of and specific to E3 [project location]]

V. Tools and Resources

E3: [project location] will use the following E3 tools and resources as part of the pilot project.

[Describe the E3 tools and resources that will be used for this pilot project. Provide links to tools when applicable.]

VI. Management Strategy

The following section identifies the lead organization(s) for the E3 [project location] project. It presents the lead organization's internal strategy for managing personnel and budgets. It also presents an external management approach for project coordination.

A. Internal Management Plan

[Provide information on the lead organization(s) for E3. Describe structure and process that the lead organization(s) will follow in working with other team members to ensure that technical and financial resources are allocated appropriately.]

B. External Management Plan

[Describe the approach for effectively managing project tasks to ensure quality deliverables.]

VII. Communication Strategy

The following section presents the plan for communicating internally to ensure effective project management. It also provides an external communication strategy to raise awareness of project activities and facilitate replication.

A. Internal Communication Plan

[Describe how the project partners will communicate internally to ensure that the project runs smoothly.]

B. External Communication Plan

[Describe how the project will communicate with external audiences to raise awareness of E3 activities and facilitate project replication.]

VIII. Roles and Responsibilities

[Describe roles and responsibilities specific to each organization and for all organizations.]

IX. Schedule of Activities

The project timeline and details on current and planned activities are provided below.

A. Project Timetable

[Planned start date/end date/milestone dates with explanation.]

B. Current & Near-Term Actions

[Insert description of ongoing and upcoming activities.]

C. Forthcoming Deliverables

[Describe expected deliverables (e.g., deliverables for light or low-level review, and for mid-level targeted review)]

D. Future Activities

[Explain long-term vision/activities.]

X. Leveraged Resources

[Describe any other direct or indirect funding sources that are being sought or have been committed to assist with E3 project. List any in-kind resources that are being sought or have been committed to assist with E3 project. Indicate where those funds or in-kind resources are being applied.]

XI. Terms and Conditions

E3: [project location] participants shall:

- A. Use funding from E3 or related solicitations for the purposes laid out in this charter or other approved activities.
- B. Use the E3 name, logo, and other branding materials in accordance with federal E3 guidelines.
- C. Provide metrics and data consistent with federal E3 data metrics. See list of federal E3 metrics.
- D. Coordinate activities with the federal E3 program on a regular basis.
- E. Provide the federal E3 program with a bi-annual performance report.
- F. Develop performance metrics approved by the federal E3 program.

- G. Notify the federal E3 program prior to making any changes to key personnel or organization.
- H. Seek approval from the federal E3 program for any major programmatic changes.

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