

Project Management Plan

<Project Name>

<Department Name>

<Version Number>

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Document Change Control

Date	Version	Author	Reviewed by	Approved by	Description
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1. Executive Summary

INSTRUCTION NOTE: AT A HIGH LEVEL AND IN SIMPLE LANGUAGE (NOT TECHNICAL), PROVIDE A SUMMARY OF THE OBJECTIVE OF THE INITIATIVE, WHAT IT INTENDS TO ACCOMPLISH AND WHAT ARE THE DRIVERS? WHO IS RESPONSIBLE FOR THIS INITIATIVE?

WHO IS AFFECTED (STAKEHOLDERS)? ONCE IMPLEMENTED, WHAT'S DIFFERENT/BETTER? BRIEFLY OUTLINE BENEFITS OR RISK OF NOT SUCCEEDING. INDICATE THE OVERALL ESTIMATED COSTS AND LENGTH OF PROJECT

2. Project Overview

2.1. Project Summary

This section describes the purpose and justification of the project in the form of business case and objectives. The business case should provide the reasoning behind the need for this project as it relates to a function of the business.

2.2. Project Goals, Business Outcomes and Objectives

Discuss the logic for the Business Need/Case (market demand, organizational need, customer request, technological advance, legal requirement, ecological impacts, social need, etc.). This section should also include the intended effects of the business case (i.e. cost savings, process improvement, new product development, etc.).

3. Project Management Approach

This section is where you outline the overall management approach for the project. This section should describe, in general terms, the roles and authority of project team members. It should also include which organizations will provide resources for the project and any resource constraints or limitations. If there are any decisions which must be made by specific individuals—for example authorizing additional funding by the project sponsor—this should also be stated here. It should be written as an Executive Summary for the Project Management Plan.

3.1. Project Scope Management Plan

3.1.1. Scope Baseline

State the scope of the project in this section. The scope statement from the project charter should be used as a starting point; however, the project plan needs to include a much more detailed scope than the charter. This detail should include what the project does and does not include. The more detail included in this section, the better the product. This will help to clarify what is included in the project and help to avoid any confusion from project team members and stakeholders.

3.1.2. Scope Management Process

It is important that the approach to managing the projects' scope be clearly defined and documented in detail. Failure to clearly establish and communicate project scope can result in delays, unnecessary work, and failure to achieve deliverables, cost overruns, or other unintended consequences. This section provides a summary of the Scope Management Plan in which it addresses the following:

- Who has authority and responsibility for scope management

- How the scope is defined (i.e. Scope Statement, WBS, WBS Dictionary, Statement of Work, etc.)
- How the scope is measured and verified (i.e. Quality Checklists, Scope Baseline, Work Performance Measurements, etc.)
- The scope change process (who initiates, who authorizes, etc.)
- Who is responsible for accepting the final project deliverable and approves acceptance of project scope

3.1.3. Boundaries

The following table outlines activities in and out of scope of this project:

Activities In Scope	Activities Out of Scope

3.1.4. Project Duration

The project duration is envisioned to be four and half fiscal years, commencing April 1st 2020 and terminating on September 30, 2024.

3.2. Project Milestones

Provide a summary list of milestones including dates for each milestone. Include an introductory paragraph in this section which provides some insight to the major milestones. This section should also mention or discuss actions taken if any changes to the milestones or delivery dates are required.

Project Milestone	Description	Expected Date
1. Project Management Plan* ¹	- Detailed Project Management Plan	Completion:
2.	-	Completion:
3.	-	Completion:
4. Client Implementation Plan*	-	Completion
5. Project Closeout Report*	- Lessons Learned Report - Business Benefits Realization Report	Completion

¹ Denotes Mandatory Document to be completed

3.3. Schedule Management Plan

This section provides a general framework for the approach which will be taken to create the project schedule. Effective schedule management is necessary for ensuring tasks are completed on time, resources are allocated

appropriately, and to help measure project performance. This section should include discussion of the scheduling tool/format, schedule milestones, and schedule development roles and responsibilities.

3.3.1. Schedule Baseline and Work Breakdown Structure

This section should discuss the WBS, WBS Dictionary, and Schedule baseline and how they will be used in managing the project's scope. The WBS provides the work packages to be performed for the completion of the project. The WBS Dictionary defines the work packages. The schedule baseline provides a reference point for managing project progress as it pertains to schedule and timeline. The schedule baseline and work breakdown structure (WBS) should be created in Microsoft Project. The WBS can be exported from the MS Project file.

3.4. Project Cost Management Plan and Source of Funding

The Cost Management Plan clearly defines how the costs on a project will be managed throughout the project's lifecycle. It sets the format and standards by which the project costs are measured, reported, and controlled. Working within the cost management guidelines is imperative for all project team members to ensure successful completion of the project. These guidelines may include which level of the WBS cost accounts will be created in and the establishment of acceptable variances. The Cost Management Plan:

- Identifies who is responsible for managing costs
- Identifies who has the authority to approve changes to the project or its budget
- How cost performance is quantitatively measured and reported upon
- Report formats, frequency and to whom they are presented

For complex or large projects the Cost Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

The following table outlines the source and estimated funding for this project.

3.4.1. Project Costs

Total project funding:

Source of Funds	FY1 20XX-XX	FY2 20XX-XX	FY3 20XX-XX
Total			

3.4.2. Project Funding

Describe where the funding is coming and how it is being allocated Dependencies

INSTRUCTION NOTE: INCLUDE A BRIEF DESCRIPTION OF ANY DEPENDENCIES AND WHAT THEIR IMPACT IS ON THE PROJECT.

4. Communications Management Plan

The purpose of the Communications Management Plan is to define the communication requirements for the project and how information will be distributed to ensure project success. You should give considerable thought to how you want to manage communications on every project. By having a solid communications management

approach you'll find that many project management problems can be avoided. In this section you should provide an overview of your communications management approach. Generally, the Communications Management Plan defines the following:

- Communication requirements based on roles
- What information will be communicated
- How the information will be communicated
- When will information be distributed
- Who does the communication
- Who receives the communication
- Communications conduct

For larger and more complex projects, the Communications Management Plan may be included as an appendix or separate document apart from the Project Management Plan.

5. Procurement Management Plan

The Procurement Management Plan should be defined enough to clearly identify the necessary steps and responsibilities for procurement from the beginning to the end of a project. The project manager must ensure that the plan facilitates the successful completion of the project and does not become an overwhelming task in itself to manage. The project manager will work with the project team, contracts/purchasing department, and other key players to manage the procurement activities.

For larger projects or projects with more complicated procurement management requirements, you can include the Procurement Management Plan as a separate document apart from the Project Management Plan.

6. Quality Management Plan

This section discusses how quality management will be used to ensure that the deliverables for the project meet a formally established standard of acceptance. All project deliverables should be defined in order to provide a foundation and understanding of the tasks at hand and what work must be planned. Quality management is the process by which the organization not only completes the work, but completes the work to an acceptable standard. Without a thorough Quality Management Plan, work may be completed in a substandard or unacceptable manner. This section should include quality roles and responsibilities, quality control, quality assurance, and quality monitoring.

7. Risk Management Plan

This section provides a general description for the approach taken to identify and manage the risks associated with the project. It should be a short paragraph or two summarizing the approach to risk management on this project.

7.1. Project Risks, Assumptions, and Constraints

7.1.1. Risks

The following table outlines the high level project risks, their likelihood of occurring, the impact on the project, the action plan and the individual tasked to monitor it.

No.	Risk Description	Probability	Impact	Risk Management Plan	OPI
1		Possible	Major		
2		Likely	Moderate		
3		Probable			

7.1.2. Assumptions if any

The following table lists assumptions taken into account to stabilize the project approach or planning.

No.	Assumptions
1	
2	
3	
4	

7.1.3. Constraints if any

The following table lists the conditional factors within which the project must operate or fit.

No.	Category	Constraints
1		
2.		
3.		
5.		

8. Project Staffing and Organization Plan

8.1. Staffing Management Plan

Discuss how you plan to staff the project. This section should include discussion on matrixed or projectized organizational structure depending on which is being used for this project. This section should also include how resources will be procured and managed as well as the key resources needed for the project.

8.2. Resource Calendar

Include a Resource Calendar as part of your project plan. The resource calendar identifies key resources needed for the project and the times/durations they'll be needed. Some resources may be needed for the entire length

of the project while others may only be required for a portion of the project. This information must be agreed to by the Project Sponsor and Functional Managers prior to beginning the project.

8.3. Project Governance

The Project Manager and other stakeholders (as needed) will meet on a weekly or bi-weekly basis to review progress on key deliverables and to discuss issues that require resolution.

9. Project Progress Report Template

Project Progress report template has been attached.



Project Progress
Report Template.xls