**Project Initiation Plan Template**

**Document Guidelines**

The Project Initiation Plan is intended to clearly articulate the steps and purpose of all activities involved in moving a project idea (Project Proposal) to one that is fully scoped, most notably in terms of deliverables, budget and timing (Project Charter). This template outlines the content and format of initiation plans to be used for all information systems and technology projects. *The* [*Project Management Office*](http://www.carleton.ca/ccs/project-office) *is your resource for completing this document.*

The intended audience of this document is all project stakeholders, including the project sponsor, senior leadership, and the project team. It forms a guide by which all project stakeholders understand and agree to the activities involved in developing a Project Charter and to work collaboratively to accomplish those activities to the highest standards of quality.

The tasks (and related information including description, person responsible, target dates) shall be managed in the Project Schedule in [Eclipse PPM](https://eod2.eclipseppm.com/login.aspx?ReturnUrl=%2fMain.aspx) for portfolio-wide reporting. The contents of this initiation plan and its timeline should be reviewed regularly by the project team and updated accordingly. Changes to this document are required to be uploaded to the project documents in Eclipse PPM the schedule should be kept up-to-date on a monthly basis.

**Text in gray is instructions for completing the template and should be removed from the final version. Sections in this document should not be removed or reordered.**

**Project Initiation Plan**

|  |  |
| --- | --- |
| **Project Name** | Test |
| **Project Sponsor** | [Name], [Position], [Department] |
| **Project Manager** | [Name], [Position], [Department] |
| **Last Updated** | [Date] |

**Project Description**

Provide a *brief* description of the outcome or deliverables of the project (as taken from the Project Proposal).

[The goal of this project is to…]

**Stakeholders**

List the key departments who may be impacted by the outcomes of this project. Explain the possible impacts for each stakeholder group.

|  |  |
| --- | --- |
| **Stakeholder Group** | **Impact** |
| [e.g. Financial Services] | [New method to collect registration fees] |
|  |  |
|  |  |
|  |  |

**Assumptions and Constraints**

List any assumptions or constraints that may affect work in the Initiation phase. These include timing of events, policies to adhere to, availability of resources, business cycle, etc.

* [Item 1...]
* [Item 2...]

**Resources**

List the human resources to be allocated to the project in the Initiation phase and outline the project responsibilities for each role.

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Key Responsibilities** |
| [e.g. Susan Smith] | [Business analyst] | [Review existing process, develop system requirements, map new process] |
|  |  |  |
|  |  |  |
|  |  |  |

**Tasks**

The timeline of tasks is used to track project progress and activities in this phase. The Project Management Office is available to assist in developing detailed schedules.

|  |  |  |  |
| --- | --- | --- | --- |
| **Task/Deliverable** | **Description/Outcome** | **Responsibility** | **Target**  |
| [e.g. Project Kick-off] | [Meeting with entire project team to walk them through the Initiation Plan and update plan with feedback.] | [name] | [date] |
| [Current state process model] |  |  |  |

**Communications**

Provide a summary of how project communication will occur during this phase to all project stakeholders. This includes emails, news posts, team meetings and project reporting.

|  |
| --- |
| **Communications/Outreach** |
| **Audience** | **Information** | **Method** | **Frequency** | **Lead** | **Comments/Participants** |
| [Academic depts.] | [Project status, decisions] | [news post] | [as required] | [name] |  |
| [Project team] | Key project documents/artifacts | [email] | [as completed] | [name] | [Also saved in project directory] |

|  |
| --- |
| ***Project Meetings*** |
| **Meeting** | **Purpose** | **Frequency** | **Lead** | **Comments/Participants** |
| [Status meeting] | [Communication of project progress] | [bi-weekly] | [name] | [Regular agenda] |
| [Information sessions] | [Socialize initiative with larger community] | [as required] | [name] | [Key committees to present to] |

|  |
| --- |
| ***Stakeholder Reporting*** |
| **Item** | **Purpose** | **Frequency** | **Lead** | **Comments/Participants** |
| [Status update] | [Communication of project progress to stakeholders] | [monthly] | [name] | [Sponsors and other key stakeholders] |
| [Sponsor meeting] | [Face-to-face discussion with sponsor on progress] | [quarterly] | [name] | [Include project director] |

**Documentation**

Describe how project documentation and artifacts will be disseminated, stored, accessed and archived and who will have update capabilities.

[Project documentation will be maintained in...]

**For Project Management Office Use Only**

|  |  |
| --- | --- |
| **Proposal Approval** | [Date] |
| **Review Date** | [Date] |
| **Project Manager** | [Name], Computing & Communication Services |