**Project Management Plan Template**

**Document Guidelines**

The Project Management Plan is intended to clearly articulate how the project will be managed, monitored and controlled, and is a core document in the CCS Project Management Methodology. This template outlines the content and format of project 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.*

Depending on the size and complexity of the project, the Project Management Plan could be a single document containing the sections identified in this template, or it could be a collection of documents consisting of more comprehensive management plans for some of various sections. This is a controlling document to manage the project, and it is used as a baseline against which to monitor project progress, costs and schedule.

As the project progresses through the execution phase, this document may be updated as project circumstances change. Changes to this document are required to be submitted to the project sponsor for review and should be forwarded to the [Project Management Office](http://www.carleton.ca/ccs/pmo).

**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 Management Plan**

**Project # [enter Project Number here...]**

|  |  |
| --- | --- |
| **Project Name** | [Enter name of project] |
| **Project Sponsor** | [Name], [Position], [Department] |
| **Author(s)** | [Name], [Position], [Department] |
| **Date** | July 21, 2014 |

**Project Description**

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

[The goal of this project is to…]

**Stakeholder Management**

List the key departments who will be impacted by the outcomes of this project. Explain the possible impacts for each stakeholder group (as taken from the Project Charter).

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

Describe how the stakeholders listed above will be engaged throughout the project and how they will be updated on project progress, decisions and outcomes.

[Enter section here…]

**Budget Management**

Identify the costs that will be incurred as a result of this project and that have been approved for this project.

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Description** | **Fiscal Funding** (one-time) | **Annual Base Funding** (recurring) |
| [e.g. Vendor consultants] | [Two vendor consultants to advise on system configuration and oversee technical implementation. 15 person days] | [$ 26,875] | [N/A] |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| ***TOTAL BUDGET (CDN$, including taxes)*** | | ***[$ 0.00]*** | ***[$ 0.00]*** |

Describe how the project budget will be managed to ensure that the project expenses do not exceed the total budget. Describe how project expenses and commitments will be tracked and reconciled in relation to the overall project budget. Provide details on how expense documentation (e.g. paid invoices, ICBs, receipts, pay forms) will be retained. Describe how the project finances will be reconciled and closed at the conclusion of the project.

[Enter section here…]

**Scope Management**

List the deliverables of the project and the subject areas that are to be included.

|  |
| --- |
| **In Scope (Project Deliverables)** |
| [e.g. Performance development management system for professional services staff] |
|  |
|  |
|  |

Identify the subject areas, deliverables or user groups that are deliberately not included as part of the scope of this project. Include any items that could be misunderstood as being in scope.

|  |
| --- |
| **Out of Scope** |
| [e.g. Functionality for faculty members and non-permanent staff] |
|  |
|  |

Provide a description of how changes to project scope will be evaluated, processed, approved and integrated into the project. Scope changes for ISSC projects must follow the [Information Systems Change Control Procedure](http://carleton.ca/ccs/project-office/wp-content/uploads/Standards_Project-Change-Control.pdf).

[Enter section here…]

**Transition and Change Management**

Identify what actions will be taken to assist the organization (or departmental unit) to successfully accept and adopt new technologies and new ways of operating. In the table below, identify any changes to the work environment as a result of this project and describe the actions that will be taken to minimize the impact on those affected.

|  |  |  |  |
| --- | --- | --- | --- |
| **Organizational Change** | **Action(s)** | **Date Required** | **Person/Role Responsible** |
| [i.e. Unit restructuring] | - Early communication to those affected  - Involvement in project/solutions | [Six months prior to go-live] | [Project Director] |
|  |  |  |  |
|  |  |  |  |

**Schedule Management**

The Project Schedule (timeline of tasks) is used to track project progress and activities. The Project Management Office is available to assist project managers in developing detailed schedules for your project. Once a Project Schedule is complete, outline the major milestones (by phase of project lifecycle) of the project below, indicating the percentage of the project work that will be completed once each milestone is achieved.

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Planned Finish Date** | **Project % Complete** |
| Initiation Phase |  |  |
| *[Fill in other milestones here...]* |  |  |
| *[Fill in other milestones here...]* |  |  |
| Project Charter approved |  | 15% |
| Planning Phase |  |  |
| *[Fill in other milestones here...]* |  |  |
| *[Fill in other milestones here...]* |  |  |
| Project Management Plan completed |  | 40% |
| Execution & Control Phase |  |  |
| *[Fill in other milestones here...]* |  |  |
| *[Fill in other milestones here...]* |  |  |
| Go-live with system/service/product |  | 90% |
| Closure Phase |  |  |
| *[Fill in other milestones here...]* |  |  |
| *[Fill in other milestones here...]* |  |  |
| Project completed |  | 100% |

**Resource Management**

List the human resources to be allocated to the project and outline the project responsibilities for each role. Specify the time each role will be allocated to the project in terms of percentage of FTE (full-time equivalent). Based on the Project Schedule, estimate the amount of work, in person days, which will be required of that role or position.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Responsibilities** | **Estimated Work [days]** |
| [e.g. Susan Smith] | [Business analyst] | [Review existing process, develop system requirements, map new process] | [48 days] |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **TOTAL RESOURCES** | | | **[\_\_ days]** |

Describe the process by which the external resources listed above will be acquired for the project, who will be overseeing their activities, and how they will be remunerated.

[Enter section here…]

**Risk Management**

List and describe the risks that may jeopardize the success and/or completion of the project, specifically risks as they relate to project costs, deliverables, project schedule, end user value and information security (confidentiality, integrity or availability of data and systems).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk Name** | **Description** | **Impact** | **Severity (H, M, L)** | **Probability**  **(H, M, L)** |
| [e.g. MTCU Guidelines] | [Mid-project change in MTCU guidelines or rules] | [Schedule, Scope] | [H] | [M] |
|  |  |  |  |  |
|  |  |  |  |  |

Define the response(s) for each risk listed above by outlining how that risk will be addressed through prevention, mitigation or acceptance during the project*.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Risk Name** | **Trigger** | **Strategy  (Prevention, Mitigation, Acceptance)** | **Actions** | **Owner** | **Deadline** |
| [e.g. MTCU Guidelines] | [MTCU memo] | [Mitigation] | * [Monthly conference call with MTCU rep] | [S. Gonsalves] | [May 2015] |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Issues Management**

Describe the tools and procedures for reporting, tracking, prioritizing and resolving problems generated during the project.

[Enter section here…]

**Quality Management**

Outline how this project will ensure its outcomes meet or exceed the success criteria and conform to relevant quality standards for all activities of the project. Some examples of integrating quality management into the project include:

* Baseline metrics are collected against the success criteria of the project
* Requirements documents are developed for each deliverable
* Test plans are developed and executed
* Project resources share the latest status of activities on a regular basis
* Technical reviews/inspections occur prior to delivery to the client
* Sponsor validates project deliverables and requirements and formally signs off on the completion of project deliverables
* Project Final Report is developed outlining how the project met the original success criteria

[Enter section here…]

**Procurement Management**

Outline how the procurement of products and external resources will be managed, taking into consideration the university [Purchasing Policy](http://carleton.ca/secretariat/wp-content/uploads/Purchasing-Policy2.pdf) and, where applicable, in coordination with the Purchasing department. Describe the procurement strategy as it relates to the following procurement processes:

* *Procurement and Solicitation* Identify possible sources of external suppliers. For external resources, indicate the evaluation criteria that will be used to obtain a suitable candidate.
* *Vendor Solicitation* Outline the format of the proposals that will be distributed to external suppliers (Request for Information, Request for Proposal, informal requests, etc...) and the method for delivery.
* *Source Selection* List the members of the evaluation team and how the contract will be negotiated and awarded.
* *Contract Administration* Identify the process and frequency for payment. For external resources, describe how their performance will be managed against the Statement of Work.
* *Contract Close-Out* Describe how the goods or services will be formally accepted and how the lessons learned will be analyzed with the external supplier.

[Enter section here…]

**Training Management**

Outline the training required for resources working on the project, for end-users, and for support staff. Include any expenses for training in the Budget Management section of this document.

[Enter section here…]

**Operational Support**

Once this project is complete, describe the support model/approach that will be used to ensure users are successfully transitioned to a new way(s) of operating and how support requests will be addressed on an ongoing basis. Describe how this support model will be funded.

[Enter section here…]

**Communications Management**

Provide a summary outlining the overall communications strategy for the project, particularly as it pertains to how customers and stakeholders will be engaged and/or informed of the new service or product.

[Enter section here…]

**Project Management Plan Appendices**

List any separate documents that have been developed, such as the Project Schedule, Communication Plan or other supporting documentation, that represent more detailed explanations of sections of this Project Management Plan.

[Enter Document names here…]

**For Project Management Office Use Only**

|  |  |
| --- | --- |
| **Review Date** | [Date] |
| **Project Manager** | [Name], Computing & Communications Services |