



PROJECT MANAGEMENT PLAN TEMPLATE

Document Guidelines

The Project Plan is a formal, dynamic document intended to clearly articulate how the project will be executed. This Template outlines the content and format of the Project Plan to be used for Information Systems projects as part of the CCS Project Management Methodology. A Project Plan should be written for each approved Project Charter. Completed project plans are to be forwarded to the Project Office for archival purposes.

Depending on the size and complexity of the project, the Project 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 the various sections. It is the controlling document to manage the project, and is used as a baseline against which to monitor project progress, cost and schedule.

As the project progresses through the Execution Phase, this document will change as project circumstances change. These changes need to be submitted to the Project Sponsor for review.

~Text in Italics is for instructions only and should be removed from the final version~



PROJECT PLAN – PROJECT #

Project Name:	<i>Name of the Project as Listed in the Project Charter</i>
Project Manager:	<i>Project Manager Assigned to this Project</i>
Date:	<i>Date of Submission</i>
Version:	<i>Version Number as Documented in the Revision History Section</i>

PROJECT DESCRIPTION

Provide the project description as listed in the Project Charter.

ASSUMPTIONS AND CONSTRAINTS

List the assumptions and constraints as documented in the Project Charter, and identify any additions or changes resulting from detailed project planning.

Assumptions

- *Use point form*

Constraints

- *Use point form*

DEPENDENCIES

Provide the dependencies as listed in the Project Charter and revise as necessary.

Dependent Project Number & Name	Impact



PROJECT INTEGRATION MANAGEMENT PLAN

Issues Management Plan

Describe the tools and procedures for reporting, tracking, prioritizing and resolving problems generated during the project. The preferred tool used for Issues Management is the Project Information Centre (PIC) application.

Training & Support Plan

Outline any training required for resources working on the project, for end-users, and for support staff. Indicate who will be responsible for the support, when the handover will occur, and how the transition from development to support will take place. Specify the method of problem reporting, documentation and knowledge transfer after the project has been completed.

SCOPE MANAGEMENT PLAN

Project Scope

Provide the “Scope” as documented in the Project Charter.

In Scope (Project Deliverables)

Provide the “Out of Scope” as documented in the Project Charter.

Out of Scope

Scope Change Management Plan

Summarize how scope changes will be evaluated, processed and integrated into the project. Include a clear description of how scope changes will be identified, and an assessment on the expected stability; i.e.; how likely the scope is to change, the frequency, and by how much. Follow the CCS Change Control Procedure attached as Appendix “A” for processing changes to the project scope that may affect cost, schedule or quality.

Organizational Change Management Plan



Organizational Change Management encompasses all activities aimed at helping an organization successfully accept and adopt new technologies and new ways to operate. Examples of organizational change might include a change in business operations, organizational restructuring (formation of teams, new positions, obsolete positions, etc.), new technologies, new program implementations such as ITIL or Total Quality Management, etc.

In the Table below, identify any changes to the Carleton University working environment as a result of this project, and describe the actions that will be taken in order to minimize the impact on those affected. Include how the various Stakeholders will be provided with information about the project’s purpose, scope, benefits, timelines and training opportunities.

Organizational Change	Action	Action Date

SCHEDULE MANAGEMENT PLAN

The Project Schedule (Timeline) is used to track project progress. Provide a summary outlining how the project work will be tracked and monitored, and how changes will be managed. To develop the Project Schedule, follow the instructions below:

- 1. The Work Breakdown Structure (WBS) is the first step toward creating the Project Schedule. It organizes and defines the total scope of the project by subdividing the project deliverables into smaller, more manageable pieces. Complete a WBS using the Template found in the “Tools & Templates” section of the CCS Project Office website and attach as Appendix “B”.*
- 2. Transpose the Elements and Deliverables identified in the WBS into the Project Schedule and define the tasks that correspond to each. Include the planned Start and Finish dates, any Dependencies amongst the tasks, and the Resources required. Use either the MS Project or MS Excel Project Schedule Template found in the “Tools & Templates” section of the CCS Project Office website, and attach as Appendix “C”.*

Milestones Baseline

Transcribe and update the Milestones from your Project Charter into the Table below to serve as the Milestones Baseline for the project. Indicate the percentage of project work that will be completed once each milestone has been achieved, using the established phase completion percentages as the benchmark. These percentages will be used to update the % complete in PIC, and project progress reporting will reflect whether the project is ‘On’, ‘Ahead’ or ‘Behind’ schedule subject to the Milestones completed, the Planned Finish Date, the Actual Finish date and the date of the report.



Milestones	Planned Finish Date	Project % Complete
Initiation Phase		
Project Charter Approved		15%
Planning Phase		
<i>Fill in other Milestones in the Planning Phase here...</i>		
Project Plan Approved		40%
Execution & Control Phase		
<i>Fill in other Milestones in the Execution Phase here...</i>		
Go-live with System, Service or Product		90%
Closure Phase		
<i>Fill in other Milestones in the Closure Phase here...</i>		
Project Completed (All project deliverables completed and Project Sponsor sign-off)		100%

COST MANAGEMENT PLAN

Cost Baseline

The Cost Baseline is the estimated Budget required to perform all work and procurement in order to successfully complete the project, as identified in the approved Project Charter. This includes any costs during the development and execution of the project (fiscal budget) and any post-implementation costs needed to maintain the project (base budget).

List the original fiscal and original base funding as documented in the approved Project Charter. Identify any additions or changes resulting from detailed project planning in the Adjusted Fiscal and Adjusted Base columns.

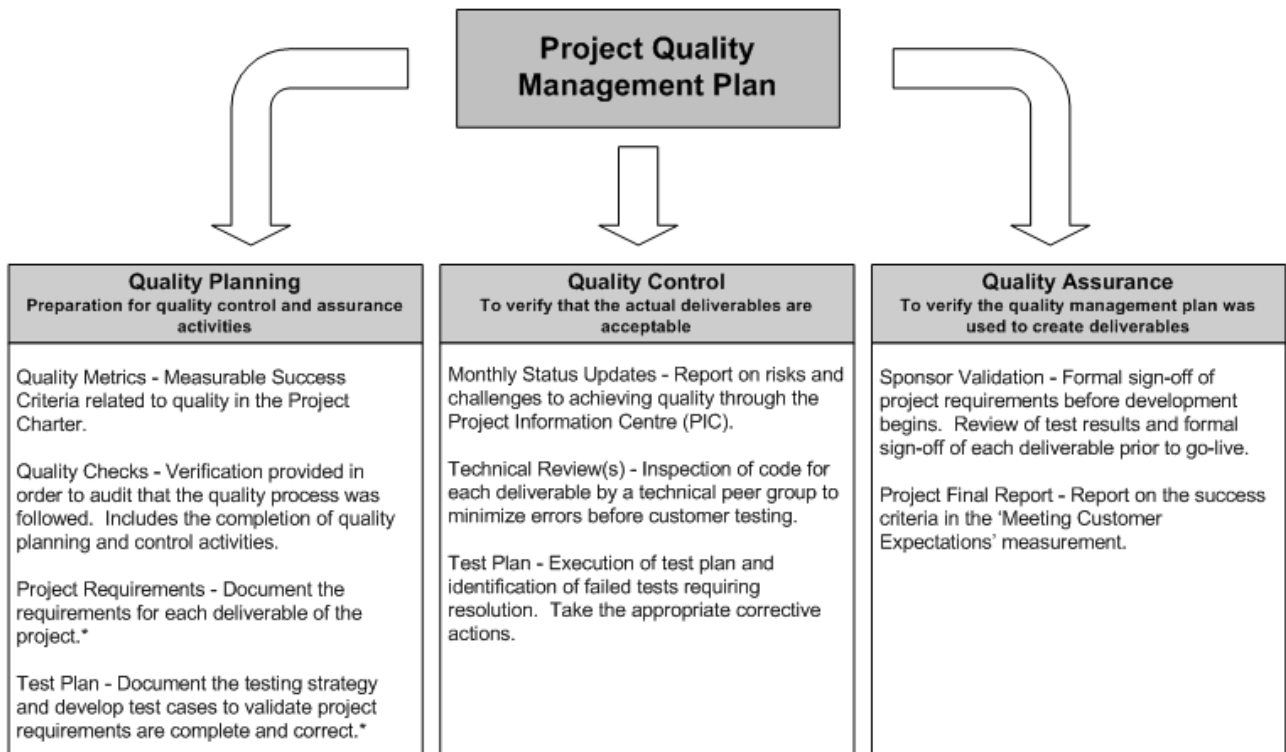
Category	Original Fiscal Budget	Adjusted Fiscal Budget	Original Base Budget	Adjusted Base Budget
People				
- Staffing (internal posting)				
- Overtime				
- Consultants				
System				
- Hardware				
- Software				
- Environmental				
Other				
- External Support				
- Training/Doc'n				
TOTALS:				

QUALITY MANAGEMENT PLAN

Quality Management Plan

Describe how the project will implement a quality approach and how it will conform to relevant quality standards for all activities and phases in the project. Document the process that will be used throughout the life of the project to evaluate quality on the output of the project. Indicate how the specific project results will be monitored, and how causes of unsatisfactory performance will be eliminated.

A graphical representation of the elements of the Quality Management Plan is outlined below to give you some ideas of what to include in this section.



**Requirements documents and Test plans are considered part of the quality management process (templates can be found in the "Tools & Templates" section of the CCS Project Office website).*



RESOURCE MANAGEMENT PLAN

Staffing Management Plan

Fill in the Table below to document the staffing requirements for the project. Describe the reporting structure, and include an organization chart for complex projects. Specify any training requirements, and dependencies on other resources not part of the Project Team. Refer to the "Project Team Roles Definition" document found in the "Tools & Templates" section of the CCS Project Office website.

The "% of Time Req'd" column refers to the percent of time the resource is required between the "Start and Release" dates of the project.

Team Member	Role	Responsibilities	Source* (current, term, contract)	Start Date	Release Date	# of Days Req'd	% of Time Req'd
Ginette Miller	Training Coordinator	Developing and executing the Project Training Plan	Current	1-Jun-08	31-Aug-08	63	80%

*"Current" means existing resources. "Term" and "Contract" imply new resources and should be reflected in the Project Cost.

Asset Management Plan

List any facilities, work space, and access/account requirements needed to support the project, and the process for acquiring them.

- List assets and acquisition process using point form

Project Stakeholders

Identify the people and positions that have a vested interest in the deliverables and overall outcome of the project.

- Project Sponsor: <name>, <position>, <department>
- Customer(s): <name>, <position>, <department>
- List other stakeholders using point form

COMMUNICATION PLAN

Provide a summary outlining the overall communications strategy for the project, the key information that will be circulated, and the method for updating the Communication Plan as the project progresses. Complete the Communication Plan Template found in the "Tools & Templates" section of the CCS Project Office website, and attach as Appendix "D" to this Plan.



RISK MANAGEMENT PLAN

Project Risks

Provide the Risks as documented in the Project Charter, and identify any additions or changes resulting from detailed project planning.

Risk Name	Description	Impact on Project (In Cost, PD, Schedule, etc)	Severity (H,M,L)	Probability (H,M,L)	Risk Rating <i>*see note</i>

*HxH = H HxM = H HxL = M MxL = M MxM = M LxL = L

Risk Response Plan

Fill in the Table below to indicate how the risks will be addressed.

Risk Name	Trigger Event	Response Strategy (see options)	Risk Response Actions	Person Responsible	In Place By

Response Strategy Options:

Prevention- eliminating the cause before it is an issue

Mitigation- completing tasks to reduce the risk, such as preventative procedures or preparing a contingency plan

Acceptance- noting the risk and accepting any consequences from not reacting to it

PROCUREMENT MANAGEMENT PLAN

Describe how the procurement of goods and external resources will be managed, taking into consideration the University Purchasing Policy. Identify how the procurement will be coordinated with other project aspects, such as scheduling and status reporting. Provide the procurement management strategy relating to the specific procurement processes as detailed below. Coordinate with the Purchasing Department where necessary; i.e., preferred vendors, RFI and RFP preparation, bidding process, etc:



- Procurement and solicitation planning: Identify the possible sources of external suppliers. If procurement relates to 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 (RFIs, RFPs, 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 (SOW).
- Contract close-out: Provide details on how the goods/services will be formally accepted, and how the “Lessons Learned” will be analyzed with the external supplier.

SECURITY PLAN

The security plan summarizes the key security issues relating to the project which may impact the confidentiality, integrity, or availability of Carleton University assets (information, systems, or processes).

Fill in the Table below by describing the key security threats associated with the project or system, and describe (at a high level) the steps that will be taken to mitigate them. For assistance with this section, please contact the Information Security Division.

Security Threats	Mitigation Approach

PROJECT PLAN APPENDICES

The Appendices listed below are the detailed plans for the more comprehensive sections of the Project Plan. Templates supporting the development of these plans are available in the “Tools & Templates” section of the CCS Project Office website.

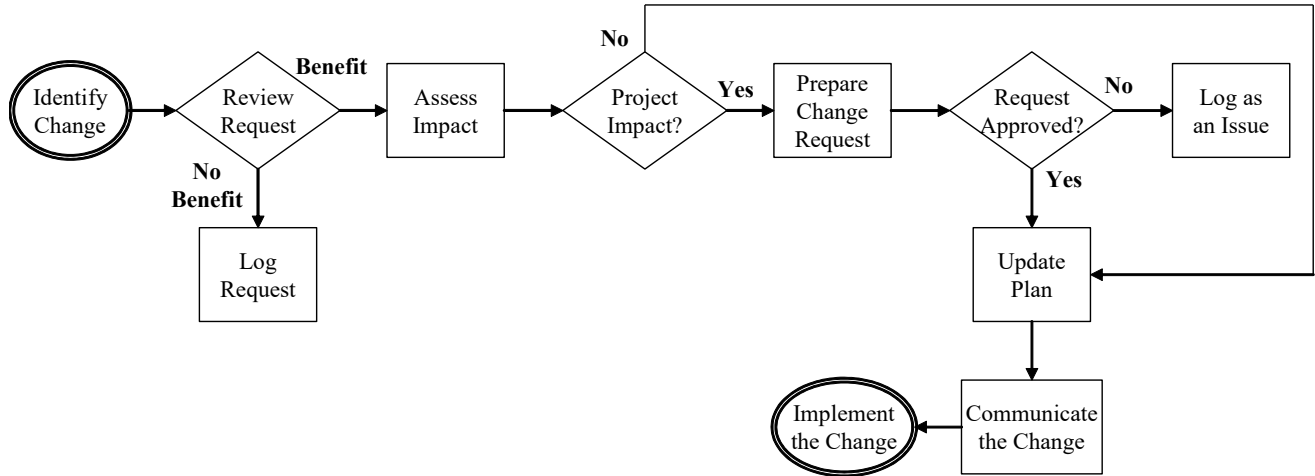
- Appendix “A”** **CCS Project Change Control Procedure**
- Appendix “B”** **Work Breakdown Structure (WBS)**
- Appendix “C”** **Project Schedule**
- Appendix “D”** **Project Communication Plan**
- Appendix “E”** **Other Supporting Documentation**



REVISION HISTORY

Version	Date	Description	Author
x.x	dd-mmm-yy	<i>Describe changes</i>	<i><name>, <position>, <department></i>

Appendix “A”: Project Change Control Procedure



Change Control Step	Action	Responsibility
Identify Change	Request a change to be made to the scope of the project.	Any Stakeholder
Review Request	Evaluate the benefits of doing the change.	Project Manager/ Project Sponsor
Log Request	Document that a request for a change was made. Include a short description and reasons for not proceeding with it.	Project Manager
Assess Impact	Identify all tasks that will be impacted either to make the change, or as a result of the change. Analyze how the change will affect project performance in terms of cost, schedule and quality.	Project Manager/ Project Team
Project Impact?	If there is no impact on the project performance, proceed with making the change and document accordingly in the Project Plan.	Project Manager
Prepare Change Request	If an impact to the project cost, schedule or quality has been identified, prepare a Change Request using the template found in the ‘Tools & Templates’ section of the CCS Project Office website.	Project Manager
Request Approved?	After obtaining Project Sponsor approval, submit the Change Request to the CCS Project Office to obtain final approval from the appropriate Change Control Board (CIO/ISSC).	Project Manager
Log as an Issue	If the change is <i>not</i> approved, it should be logged (and processed) as an issue because an area of concern had been raised which may impact the project results if left unattended. Follow the procedure outlined in the issue management section of the Project Plan.	Project Manager/ Project Team
Update Plan	Update the Project Plan with the new scope definition and baselines for schedule and cost. Submit the revised Project Plan to the Project Office for archiving.	Project Manager
Communicate the Change	Communicate the approved change to all Stakeholders. Outline how the change will impact the project, and how it will be processed.	Project Manager



Implement the Change	Assign and complete the work.	Project Manager/ Project Team
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