

Project Management Plan *Guide*

A guide to completing the Project Management Plan

Strategic Capital, Infrastructure and Projects

Prepared by:

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Version 1.0 – 17 December 2010

Overview

The Project Management Plan contains details of the strategies and information necessary to execute a project.

Separate Risk Management, Quality and Communication Plans may be prepared, as appropriate. Changes in the project during the executing phase are documented with Project Change Requests.

Project Information

Project Information will be supplied by Strategic Capital, Infrastructure and Projects

Version Control

Document all changes to the document from the initial draft version (Version 0.1).

Minor alterations result in an increment of the minor identifier (e.g. 0.1 to 0.2).

Approved versions of the document result in an increment of the major identifier (e.g. 0.3 to 1.0).

Project Management Plan Distribution

The recipients of the project plan.

Management Summary

The Management Summary should comprise a summing up of the information on the project that is most important to management: objectives, cost, time frame, key benefits and an outline of the milestones.

The summary should be 1 page or less in length, 2 pages at most, depending on the size of the project.

Major Changes from the Project Proposal

If significant changes are required from the Project Proposal, use the table to indicate changes needed across the specific key project areas and the adjustments within each area to accommodate the requested changes. If no significant changes have taken place, delete 4.1 and 4.2.

Detailed Description and Justification for Project Changes

When required, a description and justification for the project changes from which the Steering Committee can make the decision whether or not to approve the changes.

Introduction and Background

A concise history of events leading to and an explanation of why, the project is needed.

Objectives

The overall aims of the project. Projects should be broken out into “chunks” or stages. Multi-year projects should show annual objectives. Funds reserved earlier, when the Project Proposal was approved, will be released accordingly.

Scope, Constrains, Assumptions

The activities and tasks contained in the project, showing the boundaries of the project. This section should outline activities outside the project scope and any assumptions that the project is based on. Whoever is preparing the project proposal should make considerable efforts to establish the scope with the stakeholders. Scope verification and clear user requirements are important aspects to gain agreement with the stakeholders. The better the outcomes are defined, the less probability of dramatic scope changes or scope creep.

Projects should be broken out into “chunks” or stages. Multi-year projects should show annual objectives.

Interdependencies with Business Activities, Systems and Other Projects

A table of interdependencies and possible impacts to draw attention to FedU integration issues in the complex university environment.

Business Case and Benefits Realisation

The plan should present the approving authority with firm business reasons for carrying out the project. The business case shows the benefits and added value of the project for the business area and to FedU. Clear strategic alignment and financial benefits are increasingly required. List only those benefits contained within the scope of the project.

Guidelines for benefits:

- 1. A method for measuring the improvement or value should accompany each benefit. The monitoring and measuring will take place throughout the life of the system or service, long after the project and its Project (Post Implementation) Review are completed.*
- 2. During the project the project team should establish baselines for measurements that continue into the operational phase for comparison.*
- 3. Details on the method of measurement after the project ends should be handed over to the service or product owner at the time of transition from project status to operational.*
- 4. Quick wins during the project and immediately after should also be identified if possible.*

Strategic Alignment: Use The University of Ballarat 2020 Vision; 2020 Agenda - Statement of Strategic Intent (SSI) 2005-2010 (located at the University Governance website) and aligned departmental or school SSIs, to quantify the costs and benefits of the project. For example, improves research outcomes by

Financial Benefits: Include the measure of determining savings or increase in revenue. How to use standard techniques like Return On Investment and Net Present Value are easily available on the Internet and in textbooks, if required.

Work Breakdown Structure (WBS)

The WBS is a separate, foundation project document and may be a diagrammatic representation of the project activities. MS Project may also be used to prepare a WBS.

Indicate where the WBS for this project can be found.

Risk Management

A separate Risk Management Plan is required for all but very small or limited scope projects to identify project risks. Small or limited scope projects may use the Risk Management template or embed the limited risk table found in the Project Proposal template here, as judged by the project manager and governing authorities. Refer to the section on risk management in the PMG and customise the Risk Management template as appropriate.

Indicate below where the Risk Management Plan for this project can be found if separate.

Costing

The table should contain comprehensive, detailed costing for the project with individual resources identified and accounted for.

Overview: Projects should be broken out into logical “chunks” or stages. Funding may be reserved for multiple stages or for a single stage with new submissions for later stages as the project progresses. If alternative approaches to the project are possible, break out into Option 1 and Option 2 (or more) with a recommendation on the choice to make.

Salaries: These need to be calculated based on the skill levels and positions of those likely to be involved in the project.

Show end to end costs, including those that will be absorbed, for example, salaries from an Operating Grant. Modify the Costing Schedule as required, for example, removing the staff development allowance from a short contract salary. Salaries for extra Helpdesk staff, extra communications and other technical staff may have to be factored in as well, especially considering the risk that the implementation may go adversely. For major projects include a salary cost component for the Project (Post Implementation) Review.

Totalling costs: The Grand Total comprises end to end costs, as indicated in the line items of the table. The amount from an Operating Grant will be absorbed, but should be shown as indicated. Specify any other funding known in Total from other Funding, for example, a co-contribution from a faculty. Show the amount being requested in the proposal in Total Project Funds Requested. (All three should add up to the Grand Total). If project funding will be required across two calendar years, specify the years and amounts.

Capitalisation of Developing Software: Resulting assignment of capitalisation percentage is not always straightforward. The local financial officer may be consulted, as required.

Other: may include extras such as costs for BPR, as required.

Ongoing costs: This section with table to provide information on funding required after the project makes the transition to operational must be completed. The table should include figures for the ongoing costs of the continued maintenance and support of the products of the project when the project has ended. The funding source that will provide the ongoing resources must sign off on these costs or the project may not proceed – a project kill or halt point.

Use MS Excel if calculations warrant the use of a spreadsheet, or MS Project.

Timelines

The Project Plan should detail timing with milestones for implementation of the project’s activities. A timeline table is provided in the PMG and below, but for most projects it is advisable to use a product like MS Project, at least at a high level. No matter what the mechanism used, the timelines should reflect the work breakdown structure with key activities and deliverables marked.

The project manager should take much care to ensure a realistic time frame. Enlisting project team members in the time estimates is a good technique if possible. The timelines should be realistic with contingencies allocated.

Quality

This section deals with strategies for ensuring high quality for the project.

As a minimum, the Project Plan should include the quality measures and acceptance criteria to be used or a separate Quality Plan may be produced.

If a separate Quality Plan is produced, indicate where the plan can be found.

Project Management Structure

The Project Management Plan should list the names of the sponsor, steering committee members and project manager. These key project members must understand their duties and responsibilities for a project to be successful.

General guidelines are that the steering committee should work at a strategic level, while the project manager deals with operational matters and reports to the steering committee on project progress, including strategic issues. An operational reference group may be included in the project structure.

Communication

This section deals with strategies for communicating to and training stakeholders. The stakeholders identified in the Project Proposal and any new ones subsequently determined should be addressed.

Use the table below or produce a separate Communication Plan (depending on the size and complexity of the project) and specific communication needs for the project. The Communication Plan lists the activities to inform and train stakeholders about the project and the project outcomes. Marketing and/or Communications Officers in faculties and divisions should be consulted if available.

All projects involve change and the Communication Plan generally addresses change management. However if workflow change is involved Human Resources may need to be consulted to gauge the impact of that change.

If a separate Communication Plan is produced, indicate where the plan can be found.

1 Project Information

Project Information will be supplied by Strategic Capital, Infrastructure and Projects

1.1 Project Number

1.2 Project Name

1.3 Date

1.4 Project Ownership

1.5 Project Contacts

	Name	Position	Phone	Email
Primary				
Other				
Other				

1.6 Project Approval

1.7 Document Path

2 Version Control

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3 Project Management Plan Distribution List

Name	Position	Interest in Project

The recipients of the project plan.

4 Management Summary

The Management Summary should comprise a summing up of the information on the project that is most important to management: objectives, cost, time frame, key benefits and an outline of the milestones. The summary should be 1 page or less in length, 2 pages at most, depending on the size of the project.

4.1 Major Changes from Project Proposal

Category	Reason for Variance from Project Proposal	Proposed Changes (from Project Proposal)
Scope		
Time		
Cost		
Quality		
Risk Management		
Communications		

If significant changes are required from the Project Proposal, use the table to indicate changes needed across the specific key project areas and the adjustments within each area to accommodate the requested changes. If no significant changes have taken place, delete 4.1 and 4.2.

4.2 Detailed Description and Justification for Project Changes

When required, a description and justification for the project changes from which the Steering Committee can make the decision whether or not to approve the changes.

5 Introduction and Background

A concise history of events leading to and an explanation of why, the project is needed.

6 Objectives

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7 Scope, Constraints, Assumptions

Scope
Within Scope
Outside Scope
Constraints
Assumptions

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8 Interdependencies with
Business Activities, Systems and Other Projects

Interdependent Activity	Possible Impact

A table of interdependencies and possible impacts to draw attention to FedU integration issues in the complex university environment.

9 Business Case and Benefits Realisation

Benefits	How to Measure
Strategic Alignment: With FedU Statement of Strategic Intent and Plans	
Financial: Quantitative, for example, saves money, increases revenue	
Other: For example, legislative compliance, infrastructure refresh, local benefit	

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Guidelines for benefits:

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12 Costing

12.1 Costs and Resources during the life of the project

#	Category	Detail	Duration	Funding Source	Amount
Recommended Option 1:					
Salaries					
Non-Capitalised Expenditure					
Travel & Related Staff Development & Training					
Other, Including General Consumables, Printing & Stationery, Telecommunications, Consultancy and Contractors					
Capitalised Expenditure					
Grand Total(all Costs)					\$ 0.00
Total from Operating Grant					
Total from Other Funding (e.g. faculties, carry forwards)					
Total Project Funds Requested					\$ 0.00
Year(s) to receive above requested funding (e.g. If total requested = \$100K, then, 2006: \$40K, 2007: \$60K)					Year 1 – 200x: amount Year 2 – 200x amount

12.2 Basis for estimated project costs

12.3 Ongoing costs after project completes

Ongoing Support & Maintenance	Detail	Funding Source after Project Ends	Annual Amount	Name of Delegate of Funding Source who Agreed
Salaries				
Equipment				
Software				
Other				
Annual Total			\$ 0.00	

12.4 Basis for estimated ongoing costs

13 Timelines

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15 Project Management Structure

Project Role	Name	FedU Position	Interest in Project
Sponsor			
Client Leader			
Project Manager			
Expert / Specialist			
Steering Committee member			
Pro VC or nominee			
Reference Group member			
Reference Group member			

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General guidelines are that the steering committee should work at a strategic level, while the project manager deals with operational matters and reports to the steering committee on project progress, including strategic issues. An operational reference group may be included in the project structure.

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