# Project Plan

## Project Details

Project Name

Project Requestor (the person responsible for managing the project)

Project Sponsor (the University official who is funding the project)

Project Background and Business Case

* What is the project?
* What problem does this project address?
* How will this project deliver the expected business outcomes and performance objectives?
* Describe the project purpose and justification.

Project Scope: High level expectations and description

* What will project accomplish/not accomplish? Include/exclude?
* What are the expected outcomes (deliverables, services, and/or solutions)?
* What alternative solutions have already been considered to solve this problem? Why won’t they work?

Stakeholders/Affected Parties

* Who are the project stakeholders/affected parties and their function and interest in the project?

Requirements: More detailed information about what is required (will include separate text boxes for each requirement)

* What needs to be accomplished? What are the deliverables and who needs to approve them once they are complete?
* How will the work be managed?
* What are the product/project capabilities?
* What are the quality, business process, or compliance expectations?

Assumptions

* What are the project assumptions related to business, technology, resources, scope, expectations, or schedules?

Constraints

* What are the limiting factors, or constraints, that restrict the project team’s options regarding scope, staffing, scheduling, and management of the project?

Affected Business Processes or Systems

* What other business processes or systems will be affected as a result of this project?

Roles

* Describe roles and responsibilities for the project structure and stakeholders/affected parties as identified above.
  + Responsible (R): those who do the work to achieve the task
  + Accountable (A): answerable for the correct and thorough completion of the deliverable or task and the one who delegates the work to those responsible
  + Consult (C): opinions are sought, subject matter experts, two-way communication
  + Inform (I): kept up-to-date on progress, one-way communication
  + Example:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Member A** | **Member B** | **Member C** | **Member D** |
| **Plan** | R | A | C | I |
| **Develop** |  | A |  |  |
| **Design** |  |  | R | I |
| **Distribute** | C |  |  |  |

Project Timeline

* Describe the timeline that will be used for the project. Identify major project milestones and planned completion dates for delivery.

Resources Needed

* What additional resources (e.g., personnel, equipment, facilities, materials, expertise, systems, budget) are needed to accomplish the goal/task?

## Communication and Change Management

Communication Management Approach

* How will the project team communicate?
* At what milestones should communications be distributed and to whom?

Communication Stakeholders and Information Identification

* Based on project-specific methods, describe how project stakeholders and information requirements are identified and organized in order to ensure timely and appropriate collection, generation, dissemination, storage, and ultimate disposition of project information among project stakeholders and University community.

Change Management

* Consider what changes will result from the implementation of the project. How will you prepare the stakeholders/users for that upcoming change from current state to desired state? How often and how early to start communicating changes? Consider focus groups and other methods to understand resistance to change. Determine methods for assisting stakeholders/users with change.

## Risk Management

Risk Assessment

* Risk Identification: Describe how risks are identified and organized in preparation for performing risk analysis, such as use of methods and techniques like brainstorming, interviews, and risk factor tables.
* Risk Analysis: Describe how risks will be analyzed to establish the project exposure for each risk and to determine which risks are the most important ones to address. Describe scales for rating risks and risk threshold values.
* Risk Response Strategies: Describe how risk response strategies are assigned for each risk.

Risk Monitoring and Control

* Risk Tracking: Describe how risks will be continually tracked to ensure that effective risk management is performed, such as use of methods and techniques like risk checklists and watch lists.
* Risk Reporting: Describe techniques to review and present the status of project risks, such as use of reports for examination of risk response strategies in a summarized (collection or risk items) or detailed (single risk item) manner.

## Project Transition

Closeout Plan

* Summarize the plan for closing the project from an administrative, financial, and logistical perspective. Does project need to be transitioned into daily operations?
* Describe phase closeout plans if applicable.
* Lessons learned for future project reference

## Glossary

Define all terms and acronyms required to interpret the Project Plan properly.

## Approval and Authority to Proceed