|  |
| --- |
|  |
| Project Management Plan |
| [Insert Project Name] |

|  |
| --- |
|  |

***Purpose of Project Management Plan***

*The project management plan is a single, formal, dynamic document that outlines how the project is to be managed, executed, and controlled. It contains the overall project governance and related management plans and procedures, timelines, and the methods and accountabilities for planning, monitoring, and controlling the project as it progresses. This document evolves with the project and will be updated to reflect any relevant changes throughout project execution. This document should ensure there are no surprises through execution on how the project is managed or decisions are made.*

*This document is also the* ***final source of all approved changes to budget, schedule, scope, success criteria, and benefits*** *when it comes time to close the project and assess project success. The project management plan is part of the Portfolio Management Group’s* [*project planning phase*](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/planning/project-management-plan) *of the life cycle and is required for all large sized projects.*

***Project Management Plan Participants and Approvers***

*Input into the project management plan may come from many different sources including, but not limited to, Sponsor, senior leadership, project intake proposal, project charter(s) and business case(s), initial analysis/research done when proposing the project, subject matter experts within business unit(s), governance bodies, and other stakeholders (such as staff, students, faculty).*

*The author is the* [*Project Manager*](https://uwaterloo.ca/ist-project-managment-office/methodologies/roles-and-responsibilities/project-manager) *for the project. The document should initially be reviewed by and approved by the* [*Project Sponsor*](https://uwaterloo.ca/ist-project-management-office/methodology/roles-and-responsibilities/projectprogram-sponsor) *(recorded in the revision history) and governance.*

***Instructions***

1. *Write preliminary project management plan and create required baselines (budget, scope, schedule). Obtain agreement from teams and governance, and approval from sponsor. Record revisions and approvals in the Revision History*
2. *Execute the document according to the documented management plans.*
3. *Update the document, as required, to reflect approved project changes as the project evolves.*
4. *Before project completion, make any final updates and use the final schedule, budget and expenditures, success criteria, benefit, scope, et cetera to assess project success during project closure.*
5. *Upload to the Knowledge Base*

***Next Steps***

*Execute the project according to the strategies and plans laid out in this document. Update this document to reflect any approved changes during project execution. Reflect final project results in this document at the end of the project and use this document during project closure to assess project success.*

Table of Contents

[Project Definition 4](#_Toc449446927)

[Project Description 4](#_Toc449446928)

[Project Purpose 4](#_Toc449446929)

[Project Outcome and Deliverables 4](#_Toc449446930)

[Project Scope 4](#_Toc449446931)

[Project Dependencies 4](#_Toc449446932)

[Project Constraints 4](#_Toc449446933)

[Project Success Criteria 5](#_Toc449446934)

[Project Methodology 5](#_Toc449446935)

[Project Management Plans 6](#_Toc449446936)

[Schedule Management 6](#_Toc449446937)

[Schedule Management 6](#_Toc449446938)

[Baseline Schedule 6](#_Toc449446939)

[Current Schedule 6](#_Toc449446940)

[Budget and Cost Management 6](#_Toc449446941)

[Cost Management 6](#_Toc449446942)

[Baseline Budget 6](#_Toc449446943)

[Current Budget 6](#_Toc449446944)

[Other Management Plans 7](#_Toc449446945)

[Scope Management 7](#_Toc449446946)

[Change Management 7](#_Toc449446947)

[Stakeholder Management 7](#_Toc449446948)

[Communication Management 7](#_Toc449446949)

[Procurement Management 8](#_Toc449446950)

[Staffing Management 8](#_Toc449446951)

[Risk & Issue Management 8](#_Toc449446952)

[Project Governance 8](#_Toc449446953)

[Governance Committee(s) 8](#_Toc449446954)

[Governance Decision Making Approach 9](#_Toc449446955)

[Governance Reviews 9](#_Toc449446956)

[Revision History 9](#_Toc449446957)

# Project Definition

**Project Sponsor:** [insert name, title]

**Project Manager:** [insert name]

**Estimated Project Start Date:** [insert date] **Actual Project Start Date:** [insert date]

**Estimated Project End Date:** [insert date] **Actual Project End Date:** [insert date]

## Project Description

*The overview of the project should be documented in the project charter, business case, and/or intake proposal, so a link to those documents could be provided. While the Program Charter, intake form, and/or business case are good references for this section, initially, this information may have to be changed in this section and kept up to date as the project evolves.*

### Project Purpose

[Describe the project and the benefit(s) it is to deliver]

### Project Outcome and Deliverables

[Insert Project Outcome and Deliverables]

## Project Scope

*State the scope of the project (what is in and out of scope). Note that a final scope includes requirements and a breakdown of the work (e.g. a WBS) so links on where to find these should be included. The scope statement in the Project Charter can be used as a starting point. This section provides the opportunity to expand upon the charter scope in more detail, and record approved changes to scope as the project evolves. This section will always contain the up to date scope, with changes recorded in the revision history of this document. Approved scope changes will also have been documented on Change Requests.*

[Insert Project Scope]

## Project Dependencies

*This section should contain the list of project dependencies. Project work package and/or task dependencies should be documented (here or a link to where they are documented), as well as any external dependencies that may affect the project. Information in this section will change and have to be updated as the project evolves.*

[Insert Project Dependencies]

## Project Constraints

*List the constraints (restrictions that could affect the performance of the project that limit resources (people and budget), schedule, or scope and could affect quality) of the project.*

*It is important for the Project Manager to understand which of the resources ($$ and people)/schedule/scope constraints are most to least flexible within the project. Include this information by making one ‘x’ on each row in the Triple Constraint Flexibility Matrix below. This information provides guidance on the Project Sponsor’s level of flexibility in these areas when determining trade-offs in planning and change control.*

*The project charter is a good reference to start this section. Information in this section will change and have to be updated as the project evolves.*

[Insert Project Constraints]

Triple Constraint Flexibility Matrix

|  |  |  |  |
| --- | --- | --- | --- |
| Flexibility: | Least | Somewhat | Most |
| Resources ($$ and people) |  |  |  |
| Schedule |  |  |  |
| Scope |  |  |  |

## Project Success Criteria

*What is required for the success of this project, accounting for factors that contribute towards the realization of the benefits and goals/objectives? The success criteria should be unambiguous, observable and traceable back to the project goals and benefits. The project charter is a good reference to start this section on some potential criteria that may have been identified during initiation. It is likely that measures will have to be further defined during planning and execution, so information in this section will change and have to be updated as the project evolves.*

[Insert Project Success Criteria]

## Project Methodology

*This section should contain a description of the* [*methodology*](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/execution/project-change-request) *(waterfall, iterative, incremental, agile, hybrid) that will be followed for this project and why this methodology has been chosen. If iterative, incremental, agile, or a hybrid approach is chosen, this section should include details on iteration lengths, incremental releases, etc. Describe how the methodology will be managed and whether pilots, prototypes, focus groups, et cetera will be used.*

[Insert Project Dependencies]

# Project Management Plans

## Schedule Management

### Schedule Management

*This section should describe the approach for creating, updating, and monitoring the project schedule. This section should also include information on the scheduling tools/formats to be used, and schedule development roles and responsibilities.*

[Insert Project Schedule Management]

### Baseline Schedule

*Insert or link to the baseline (initial) schedule developed for the project. The schedule should account for tasks, priorities, dependencies, and milestones.*

[Insert Project Baseline Roadmap]

### Current Schedule

*Insert or link to the current, updated version of the project schedule that reflects any approved changes during project execution. The schedule should account for tasks, priorities, dependencies, and milestones.*

[Insert Current Project Schedule]

## Budget and Cost Management

### Cost Management

*Provide a description of how the costs of the project will be managed. It should include: who is responsible for managing costs, who has the authority to approve changes to the project or its budget, whether and how cost performance is quantitatively measured and reported upon, and any report formats/frequencies and to whom they are presented.*

[Insert Cost Management Plan]

### Baseline Budget

*Insert or link to the baseline (initial) budget developed for the project.*

[Insert Project Baseline Budget]

### Current Budget

*Insert or link to the current, updated version of the project budget and expenditures that reflects any approved budget changes during project and component execution, as well as expenditures to date.*

[Insert Current Project Budget and Expenditures]

## Other Management Plans

### Scope Management

*Provide a description of the following: who has the authority and responsibility for scope management, how the scope is defined, how the scope is measured and verified (e.g. quality checklists, scope baseline, benefits register, etc.), the scope change process (which may already be documented in the change control process), and who is responsible for approving project scope and accepting final project deliverables.*

[Insert Scope Management Plan]

### Change Management

*Provide a description of the project’s change control process (this would be for changes to do with the project scope, schedule, and budget). Project changes are normally responses to updated business drivers or constraints. This section should include: where change requests are to be stored and how they will be tracked & monitored, identification of who has approval authority for changes, and who can submit requests for change. The scope of change in this section should include changing scope of the project, changing benefits or goals/objectives, changes to budget, changes in timelines, et cetera. It is recommended that the PMO’s* [*change request template*](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/execution/project-change-request) *be used for requesting and approving changes.*

[Insert Change Management Plan]

### Stakeholder Management

*This section should contain the list of stakeholders, and outline any specific plans for managing these stakeholders. Insert or link to the stakeholder register. Stakeholders can be maintained within the* [*stakeholder register template*](https://uwaterloo.ca/ist-project-management-office/methodologies/project-management/initiation/stakeholder-register)*, or the table from the template could be copied here and maintained during project execution within this document. The primary stakeholder(s) should be clearly identified within the register.*

*Describe how the stakeholders will be managed, including how often the stakeholders will be monitored and the register updated, who is responsible, who is involved in gathering information for the register, and identifying strategies for managing stakeholder groups.*

[Insert Stakeholder Management Plan]

### Communication Management

*Link to the communications plan for the program, or copy the* [*communications plan template*](https://uwaterloo.ca/ist-project-management-office/methodology/project-management/planning/communications-plan) *and maintain the communications plan here. This communications plan should be updated regularly and be based on expectations of stakeholders, program governance, and the project team.*

[Insert Communication Management Plan link or information here]

### Procurement Management

*Provide a description of the necessary steps and responsibilities for procurement from the beginning to the end of the project. Depending on the project, this section may require the Project Manager to work closely with Procurement, a Licensing Coordinator, etc. Include information on who is responsible for contract negotiations, approvals, maintaining the vendor relationship and monitoring vendor progress against contract and statements of work.*

[Insert Procurement Management Plan]

### Staffing Management

*Provide a description of how the project will be staffed and how staff will be managed. List key resources and times/durations they are needed, as well as any required project staff training to prepare them. Include any information on reporting relationships and/or dotted reporting relationships, staff performance issues, and how escalations will be handled if staff availability is an issue. Provide project team members with the option of determining and* [*tracking their project goals*](https://uwaterloo.ca/ist-project-management-office/individual-project-goals) *with the PM and their functional managers and document how this will be managed.*

[Insert Staffing Management Plan]

### Risk & Issue Management

*Provide a description of the approach taken to identify and manage project risks, actions, issues and decisions (RAID). It should include how they are reported, logged, tracked and monitored. Include who has access to submit them, who is accountable for dealing with them, any agreed upon response times that should be documented, etc. Specifically identify how risk triggers are monitored and by whom, and how a risk is converted to an issue when triggers fire. This section should clearly point to where the RAID log for the project is stored.*

[Insert Risk & Issue Management Plan and link to RAID log]

# Project Governance

## Governance Committee(s)

*Describe the project governance structure (diagrams may be used with this description). Describe the roles and responsibilities of each governing group, outlining decision making authority, and overall interest/focus/purpose of the group within the project. Document how often the governing groups will meet, who will chair, and who attends the meetings (as a member and as a reference source, when required). If there is a terms of reference documented for the group, provide a link to it.*

[Insert Governance Committee(s)]

## Governance Decision Making Approach

*Describe the decision making approach the group(s) will follow. Include a list of decision guidelines and agreed upon priorities against which decisions will be made. Outline how escalations to the group(s) should be brought forward and handled by the group(s), and how decisions will be documented and communicated. If the decision making authority of the group(s) is not included in the above section, it should be included here. If there is a standard agenda to be followed during these meetings for the group(s), include it here.*

[Insert governance decision making approach]

## Governance Reviews

**Stage gate/Milestone reviews**

*This section outlines stage gate or milestone reviews and their requirements. This section should outline when the reviews will be held, what will be reviewed, and the data to be reviewed prior to determining whether to move on to the next stage.*

[Insert stage gate/milestone reviews]

**Project performance reviews**

*This section outlines when and how often project performance will be reviewed by the group(s), focusing on the overall performance and management of the project. This section should also describe the required project performance information that must be provided to the group(s) in support of these reviews.*

[Insert project performance reviews]

# Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
|  |  |  |  |  |
|  |  |  |  |  |