# Project Plan

## [Project Name]

### Version of TAC 216 Companion Guide: [Version]

### Start: [Date]

### Projected End: [Date]

Approval of a project plan indicates an understanding of the purpose and content described in this deliverable. By signing this Project Plan, you agree that work will begin on this project and that resources are committed as described.

| **Approver Name** | **Approver Title** | **Signature** | **Date** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Note to the Author**

Use this template to help you write a project plan. The template includes instructions to the author, boilerplate text, and fields that should be replaced with specific project values.

**Blue** text enclosed in angle brackets (<text>) either provides instructions to the document author, or describes the intent, assumptions and context for content included in this document. **Delete the blue text** as you fill out the project plan sections.

**Brown** text enclosed in square brackets ([text]) indicates an example. **Replace the brown text** as you fill out the project plan sections.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing this document; they are not mandatory formats.

**Please delete this page before signing the project plan.**

[Section 1: Project Overview and Scope 5](#_Toc145943816)

[Project Summary 5](#_Toc145943817)

[Scope 5](#_Toc145943818)

[Project Includes 5](#_Toc145943819)

[Project Excludes 5](#_Toc145943820)

[Requirements 5](#_Toc145943821)

[Deliverables 5](#_Toc145943822)

[Work Breakdown Structure (WBS) 6](#_Toc145943823)

[WBS Location: <Delete the WBS Location identifier if using the table.> 6](#_Toc145943824)

[Document Repository and Collaboration Methods 6](#_Toc145943825)

[Section 2: Schedule 6](#_Toc145943826)

[Schedule and Work Assignments 6](#_Toc145943827)

[Schedule Location: <Delete the Schedule Location identifier if using the table.> 7](#_Toc145943828)

[Final Project Delivery Date and Uncertainty 7](#_Toc145943829)

[Section 3: Budget and Oversight 8](#_Toc145943830)

[Budget Estimates 8](#_Toc145943831)

[Budget Location: 8](#_Toc145943832)

[Final Project Cost and Uncertainty Level 8](#_Toc145943833)

[Procurement Plan 8](#_Toc145943834)

[Section 4: Resources, Roles and Responsibilities 8](#_Toc145943835)

[Project Team 8](#_Toc145943836)

[Roles and Responsibilities 9](#_Toc145943837)

[Section 5: Risks 9](#_Toc145943838)

[Risk Identification and Analysis 9](#_Toc145943839)

[Risk Prevention and Response 9](#_Toc145943840)

[Section 6: Quality 10](#_Toc145943841)

[Quality Standards 10](#_Toc145943842)

[Quality Processes 10](#_Toc145943843)

[Section 7: Communication 10](#_Toc145943844)

[Communication Plan 10](#_Toc145943845)

[Status Reporting 11](#_Toc145943846)

[Status Reporting Process 11](#_Toc145943847)

[Status Reporting Thresholds 11](#_Toc145943848)

[Issue Management 11](#_Toc145943849)

[Lessons Learned Tracking Process 11](#_Toc145943850)

[Section 8: Stakeholders 11](#_Toc145943851)

[Stakeholder Register 11](#_Toc145943852)

[Section 9: Assumptions and Constraints 12](#_Toc145943853)

[Assumptions 12](#_Toc145943854)

[Scope 12](#_Toc145943855)

[Schedule 12](#_Toc145943856)

[Budget 12](#_Toc145943857)

[Other 12](#_Toc145943858)

[Constraints and Triple Constraint Priority 12](#_Toc145943859)

[Section 10: Change Control 14](#_Toc145943860)

[Change Control Process 14](#_Toc145943861)

[Change Control Tool(s) 14](#_Toc145943862)

[Section 11: Deployment, Stabilization and Transition to Operations 14](#_Toc145943863)

[Deployment and Transition 14](#_Toc145943864)

[Product/Service Support 14](#_Toc145943865)

#### Section 1: Project Overview and Scope

##### Project Summary

<What do the sponsor, stakeholders and organization want this project to accomplish? Provide a brief summary of the project. Include both the purpose of this project and its business justification. Reference the Business Case, Project Charter and any other project documents.>

##### Scope

<The scope defines project limits and identifies the products, services, or result delivered by the project. The scope establishes the boundaries of the project. The project scope definition should also describe products and/or services that are outside of the project scope. A statement of scope is required for all projects.>

##### Project Includes

##### Project Excludes

##### Requirements

<Detail the specific project and product requirements that must be met to satisfy the business objectives. A list of requirements is required for all projects.

If your project is large, consider listing only the high level requirements here and putting the detailed requirements in a separate requirements document.>

| Requirement # | Requirement Type | Description |
| --- | --- | --- |
| [Req-1] | [Reporting, Interfaces, User Access, Security, Support, Other] | [All data must be encrypted in the database] |
|  |  |  |
|  |  |  |
|  |  |  |

##### Deliverables

<List each project deliverables with its due date. This list should reflect products and/or services included with this project, as well as the delivery of key project management or other project-related deliverables. Who will approve each deliverable? A list of deliverables is required for all projects.>

| Deliverable Name | Accepted By | Due Date |
| --- | --- | --- |
| [A new Product] |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

##### Work Breakdown Structure (WBS)

<The WBS is a breakdown of the project work into small, manageable activities often organized around project deliverables. Each activity can be linked to a project objective and/or requirement. Due to the complexity of Level 3 or 4 projects, a number of tools can be used to document a WBS (MS Project, Excel, etc.).

Option 1: Develop the WBS using your selected tool and document where it is stored.

Option 2: For smaller projects, create a WBS in the simplified table below.>

##### WBS Location: <Delete the WBS Location identifier if using the table.>

<Delete the table if using the WBS Location link.>

| Requirement ID\* | Level | Deliverable/Activity |
| --- | --- | --- |
|  | 1 | [CMS Discovery] |
|  | 2 | [Choose CMS] |
|  | 3 | [Find server to house CMS] |
|  | 3 | [Purchase CMS software] |
|  |  |  |
|  |  |  |
|  |  |  |

##### Document Repository and Collaboration Methods

<Identify the project repository and collaboration methods that will be used. A document repository and collaboration environment is required for all projects.>

| Project Repository | Date Initiated |
| --- | --- |
| [SharePoint; Google Drive; File Share <location>] |  |

| Collaborative Environment | Date Initiated |
| --- | --- |
| [Google Drive; Basecamp] |  |
|  |  |
|  |  |

#### Section 2: Schedule

##### Schedule and Work Assignments

<The project schedule establishes the work plan (resources, activities, and timeline) for the project. Develop a project schedule by establishing dependency relationships among the WBS activities, assigning work effort and resources, and establishing the start and end date of activities. The project schedule and work assignments are required for all projects.

Option 1: Develop the schedule using your selected tool and document where it is stored.

Option 2: For smaller projects, create a schedule in the simplified table below.>

##### Schedule Location: <Delete the Schedule Location identifier if using the table.>

< Delete the table if using the Schedule Location link.>

| Activity | Predecessors/ Dependencies | Assigned To | Start Date | Finish Date | Duration |
| --- | --- | --- | --- | --- | --- |
| [Set up new server] | [decide on server location] | [John Smith] |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

##### Final Project Delivery Date and Uncertainty

<The project schedule determines the final project delivery date. Identify the level of uncertainty associated with the final project delivery date. Uncertainty can be shown as a range limit (e.g., “between 6/16/2016 and 7/15/2016” or “no later than 7/15/2016”) or as a percentage range (e.g., + - 15%). The level of uncertainty is required for Level 2, 3 and 4 projects.>

| Final Project Delivery Date | Level of Uncertainty |
| --- | --- |
|  |  |

#### Section 3: Budget and Oversight

##### Budget Estimates

<A project budget includes all of the funds authorized to execute the project. A budget is required for all projects.

Where is the budget stored?>

##### Budget Location:

<For smaller projects, you may create a budget in the simple table below.

Identify individual budget items, estimated costs and account numbers. Who will approve the estimates? Approvers must be identified for Level 3 and 4 projects.>

| Budget Item Description | Estimate | Account | Approver |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

##### Final Project Cost and Uncertainty Level

<The sum of individual item estimates determines the final project cost. Identify the level of uncertainty associated with the project cost. Uncertainty may be shown as a range limit (e.g., “not to exceed $10, 000” or “between $20,000 and $25,000”) or as a percentage range (e.g., “+ - 10%). The level of uncertainty is required for Level 2, 3 and 4 projects.>

| Final Project Cost | Level of Uncertainty |
| --- | --- |
|  |  |

##### Procurement Plan

<Identify the items to be purchased, the estimated cost, the selection process and criteria, and the vendor if known. When are the items needed in order to meet the project schedule? A procurement plan is required for all projects.>

| Description/Specification Estimated Cost | | Selection/ Contracting Process and Criteria | Vendor/ Supplier | Needed By |
| --- | --- | --- | --- | --- |
| [Oracle licenses] | $[100,000] | [Sent out for bid. Budget, proposal were reviewed for criteria] | [VAR] |  |
|  | $ |  |  |  |
|  | $ |  |  |  |
|  | $ |  |  |  |

#### Section 4: Resources, Roles and Responsibilities

##### Project Team

<Identify project team members by role and detail contact information for each team member.>

| Project Role | Name | Email | Phone |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

##### Roles and Responsibilities

<List major deliverables and project roles. You may substitute team member names for role names. Then, specify responsibilities.

The letter codes are as follows:

* R – Responsible; they will do the work
* A – Accountable; they are responsible that the work get done properly (only ONE per activity!)
* C – Consulted; subject matter expert
* I – Informed; kept in the loop>

| Deliverable\* | [Role 1] | [Role 2] | [Role 3] | [Role 4] | [Role 5] | [Role 6] |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

<\*From the Deliverables table.>

#### Section 5: Risks

##### Risk Identification and Analysis

<Describe the risk events and their impact on the project. Who owns each risk? Assess the impact and the probability using values (Low=1, Medium=3, High=5). Multiply the impact and probability to identify the risk score.>

| Risk # | Risk Description | Impact on the Project | Impact (I) | Probability (P) | Risk Score  (I \* P) |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

##### Risk Prevention and Response

<Determine which risks should be tracked and monitored based on the risk threshold for your project. What prevention/mitigation steps will you take to reduce the likelihood of the risk becoming an issue and/or the adverse effects on the project? If this risk becomes an issue, what is your response plan? Have you defined contingency reserves? (Contingency reserves consist of time that can be added to the project schedule and/or cost that can be added to the budget to cover expenses to address the issue.) Who is in charge of tracking and monitoring each risk?>

| Risk # | Prevention /Mitigation | Response/ Contingency | Risk Owner |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

<A formalized risk register is required for Level 3 and 4 projects. Consider using the **Risk Register Template.>**

#### Section 6: Quality

##### Quality Standards

<Describe applicable quality standards, the person responsibility for compliance, and how the standard affects the project. Quality standards must be identified for all projects.>

| Standard Name | Owner | Scope | Summary |
| --- | --- | --- | --- |
| [Texas A&M University System TAC 216 Companion Guide] |  | [Project management practices] | [Provides a framework for complying with TAC 216] |
|  |  |  |  |
|  |  |  |  |

##### Quality Processes

<Describe the quality assurance and quality control processes in the table below. Quality assurance and control processes are required for Level 3 and 4 projects.>

| Review Type | Frequency/ Timeline | Tools | Reviewer | Reports |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

#### Section 7: Communication

##### Communication Plan

<Define the communication plan for the project and how information will be distributed to update all stakeholders, team members, and executives on overall project status and performance. A project communication plan is required for all projects.

Define the purpose and format/medium of project communications, who the communication comes from and who the communication is made to, and the timeframe or frequency of that communication.>

| Purpose | Format/ Medium | From Role | To Role/ Group | Frequency |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

##### Status Reporting

<The Status Report is used to communicate the project’s overall health to the project core team, governance stakeholders and key project stakeholders to keep everyone abreast of project progress.

Describe how status will be reported. Include status reporting as a recurring item in the Communication Plan. Define thresholds of Red, Yellow, and Green, if used. Suggested values are provided in the table below.>

##### Status Reporting Process

##### Status Reporting Thresholds

| Status | Color | Definition |
| --- | --- | --- |
| On Track | **G** | The project and all deliverables are on schedule and within budget. |
| Off Track | **Y** | The project or one or more deliverables is off schedule or over budget, but a recovery plan is in place. |
| Problem | **R** | The project or one or more deliverables is off schedule or over budget, and help is needed from the project sponsor and/or project steering committee. |

##### Issue Management

<Describe how project issues will be tracked, managed, and controlled throughout the life of the project, making sure to point out methods and tools used.>

##### Lessons Learned Tracking Process

<Describe how lessons learned will be tracked throughout the life of the project so that, at the end of the project, they can be transferred to the Project Lessons Learned document.>

#### Section 8: Stakeholders

##### Stakeholder Register

<List the stakeholders, rate their impact on the project, and their interest, their influence and their involvement. Describe how the project will engage with them. A stakeholder register is required for Level 3 and 4 projects.>

| Stakeholder Name | Project Impact, Interest, Influence and Involvement | Engagement Strategy |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

#### Section 9: Assumptions and Constraints

##### Assumptions

<Describe the assumptions made while setting the project’s requirements, scope, schedule, and budget, as stated in the Project Charter. Have you identified any new assumptions or have you modified any assumptions since the project was initiated?>

##### Scope

##### Schedule

##### Budget

##### Other

##### Constraints and Triple Constraint Priority

<Have there been any changes to the ranking of the Triple Constraints, as stated in the Project Charter? Have you identified any new or modified constraints since the project was initiated? Use “1” to indicate the most important constraint, with “2” for the second most important and “3” for the least important.>

| Triple Constraint | Ranking | Comments |
| --- | --- | --- |
| Scope | Choose a ranking. |  |
| Schedule | Choose a ranking. |  |
| Budget | Choose a ranking. |  |
| Other | Not applicable |  |

#### Section 10: Change Control

<Change Control involves identifying, documenting, approving or rejecting, and controlling changes to the project such as changes to scope, schedule and budget. Describe the process for managing all proposed changes, including how changes to scope, schedule and budget will be requested, who will receive requests and make decisions and how the changes will be monitored, controlled and approved. For Level 3 and 4 projects, define the frequency of change control board or project steering committee meetings.

Define which tool will be used to track and approve changes. A Project Change Request and a Change Log are helpful tools to document, communicate, and approve changes.>

##### Change Control Process

##### Change Control Tool(s)

#### Section 11: Deployment, Stabilization and Transition to Operations

<When closing a project or phase it is important to review all activities to make sure they are ready for formal completion and transition to operational/steady state.>

##### Deployment and Transition

<Define the strategy for deploying project deliverables and transitioning the product or service to a production or operational state. Consider training, governance, support, funding, communicating, etc.

How will the project or phase be closed from an administrative, financial, and logistical perspective?>

##### Product/Service Support

<Describe support requirements for the resulting project or service. Who will be responsible for meeting these requirements?>