# Project Plan

## Project Name: Click or tap here to enter text.

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

##### Start: [Date]

##### Projected End: [Date]

Approval of the Project Plan indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees this project will be executed and necessary resources are committed as described herein

**Approver Name Title Signature Date**

Approver Name Approver Title \_\_\_ date

Approver Name Approver Title \_\_\_ date

Approver Name Approver Title \_\_\_ date

Approver Name Approver Title \_\_\_ date

Approver Name Approver Title \_\_\_ date

### Section 1. Project Overview and Scope

#### Project Description

Provide a high-level description of the project. What are you trying to achieve? What business issue or need is being addressed, as stated in the Business Case and/or Project Charter?

Click or tap here to enter text.

#### 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.

| Requirement Type | Requirement ID\* | Description |
| --- | --- | --- |
| Feature/Function | F1 |  |
|  | F2 |  |
|  | F3 |  |
| Reporting | R1 |  |
|  | R2 |  |
|  | R0003 |  |
| User Access | U0001 |  |
|  | U0002 |  |
|  | U0003 |  |
| Interfaces | I0001 |  |
|  | I0002 |  |
|  | I0003 |  |
| Service Level/ Performance/ Scalability/ Information Security | S0001 |  |
|  | S0002 |  |
|  | S0003 |  |
| Support and Maintenance | M0001 |  |
|  | M0002 |  |
|  | M0003 |  |
| Other | OR0001 |  |
|  | OR0002 |  |
|  | OR0003 |  |
|  |  |  |

\*The unique identifier for each requirement.

\*\*The unique identifier for each business goal/objective as listed in the Business Case, for easy cross reference.

#### Deliverables

List the project deliverables and their due dates. 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 |
| --- | --- | --- |
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#### Work Breakdown Structure (WBS) & Work Assignment

The WBS is a breakdown of work into small, manageable activities. Each activity can be linked to a project objective and/or requirement. A WBS is required for Level 3 and 4 projects.

Where is the WBS stored?

|  |  |
| --- | --- |
| **WBS Location** |  |

For smaller projects, you may create a WBS in the simplified table below.

| Requirement ID\* | Level | WBS Code\*\* | Deliverable/Activity | Assigned to |
| --- | --- | --- | --- | --- |
|  | 1 | 1 | [1st Deliverable Name] |  |
|  | 2 | 1.1 | [Activity Name] |  |
|  | 3 | 1.1.1 | [Child Activity Name] |  |
|  | 3 | 1.1.2 | [Child Activity Name] |  |
|  | 3 | 1.1.3 | [Child Activity Name] |  |
|  | 2 | 1.2 | [Activity Name] |  |
|  | 3 | 1.2.1 | [Child Activity Name] |  |
|  | 3 | 1.2.2 | [Child Activity Name] |  |
|  | 4 | 1.2.2.1 | [Child Activity Name] |  |
|  | 4 | 1.2.2.2 | [Child Activity Name] |  |
|  | 1 | 2 | [2nd Deliverable Name] |  |
|  | 2 | 2.1 | [Activity Name] |  |
|  | 3 | 2.1.1 | [Child Activity Name] |  |
|  | 3 | 2.1.2 | [Child Activity Name] |  |
|  | 2 | 2.2 | [Activity Name] |  |
|  | 3 | 2.2.1 | [Child Activity Name] |  |
|  | 3 | 2.2.2 | [Child Activity Name] |  |
|  |  |  |  |  |

\*The unique identifier for each requirement.

\*\*The unique identifier for each deliverable or activity in the Work Breakdown Structure (WBS).

#### 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

#### 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 |
| --- | --- | --- | --- | --- |
|  | $ |  |  |  |
|  | $ |  |  |  |
|  | $ |  |  |  |
|  | $ |  |  |  |

### 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] |
| --- | --- | --- | --- | --- | --- | --- |
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\*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? Analyze the impact on a scale of 1 to 10 and the probability on a scale of 1 to 9. Multiply the impact and probability to identify the risk score.

| Risk ID\* | Risk Description | Impact on the Project | Impact (I) | Probability (P) | Risk Score  (I \* P) |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
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\*The unique identifier for each risk.

#### 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 ID\* | Prevention/Mitigation | Risk Owner |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

\*The unique identifier for each risk.

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 utilized for communicating the overall health of the project to the project core team and key project stakeholders to keep everyone abreast of project progress. A Status Report template is provided in the Project Executing, Monitoring and Controlling template.

Describe how status reporting will be accomplished and be sure to include status reporting in the Communication Plan. Define thresholds of Red, Yellow, and Green, if used. Suggested values are provided in the table below.

|  |  |  |
| --- | --- | --- |
| Status | Color | Definition |
| On Track |  | The project and all deliverables are on schedule and within budget. |
| Off Track |  | The project or one or more deliverables is off schedule or over budget, but a recovery plan is in place. |
| Problem |  | 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. |

#### Click or tap here to enter text.

#### Issue Management

Describe how project issues will be tracked, managed, and controlled through the entire life cycle of the project, making sure to point out methods and tools used. The Issue Log in the Project Log template is a helpful tool to track and manage issues.

Click or tap here to enter text.

#### Lessons Learned

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. The Lessons Learned Log in the Project Log template is a helpful tracking tool.

Click or tap here to enter text.

### Section 9. Assumptions and Constraints – find alternative A&C

#### Assumptions

Describe the assumptions made in establishing this project’s requirements, scope, schedule, and budget, as stated in the Project Charter. Have you identified any new or modified 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?

| Triple Constraint | Ranking | Comments |
| --- | --- | --- |
| Scope | **Choose an ranking.** |  |
| Schedule | **Choose an ranking.** |  |
| Budget | **Choose an 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 costs. 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 project, you must define the frequency of change control board or project steering committee meetings.

Define what tool will be used to track and approve changes. The Project Change Request template is a helpful tool to document, communicate, and approve changes. A Change Log is provided in the Project Log template.

Click or tap here to enter text.

### 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?

Click or tap here to enter text.

**Training Plan:**

How would end users be trained

Click or tap here to enter text.

#### Product/Service Support

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

Click or tap here to enter text.