This Guide should be read in conjunction with the template which follows. Accordingly, the Guide should be removed from the front of the document once complete.

**Purpose**

The Project Plan provides the detailed project work plan, timescale and resourcing requirements, against which the Project Board or Sponsor can effectively monitor and control project progress. Where a separate business case is not required, the Project Plan also provides the business justification for the project, which is reviewed as the project progresses to ensure it remains valid.

**What should the Project Plan cover?**

The key areas that the Project Plan should cover are:

* Details of the project deliverables, including timing of and responsibilities for delivery
* Key project milestones
* Key dependencies, constraints and assumptions
* An overview of the major project risks
* A high level project timeline
* Resource management, including budget and other resourcing requirements.

**Key considerations in developing the Plan**

The key considerations in the development of the Plan are:

* The Plan must be achievable. This means that estimates must be based on consultation with the staff who will undertake the work and/or reference to historical data
* The Plan should incorporate, or be informed by, lessons from previous projects
* Project management and control activities (such as planning, reporting, reviewing and quality checking), as well as the activities to create the products in scope should be considered and included in the plan
* The Plan should support the quality management, risk management and communication management activities required for the project.

**How to use this template**

**Individual project data**

The cover page of the template document contains individual project details. Please complete all of the fields on the first page. The details you insert will automatically populate the Project Title, ID and Version fields in the document headers and footers.

**Text styles**

When using this template, please note that:

* Blue text is intended to be replaced.
* Normal text should be retained in the document wherever possible.

Executive Summary

This section should be completed after the rest of the document is finished and should form a succinct summary of all the major points you have made. This section should not contain any information that is not referred to elsewhere in the document.

Introduction and business justification

Use this section to provide a brief introduction to the project.

If a separate Business Case has already been developed, provide a brief introductory paragraph outlining the purpose of the project and when the Business Case was approved. Also delete the remainder of this section and instead provide a link to the approved Business Case document.

If the business justification will be included in this document (ie no separate Business Case is required), this section should provide a brief history outlining the issue, problem or opportunity being addressed by the project (ie the business case for the project), how the project has come into being, and from where the authority and drive for it comes (this will include details of the Project Sponsor). Use the following headings to structure this information:

Background and rationale

Include a short history outlining how the project has come into being, and from where the authority and drive for it comes (this will include details of the Project Sponsor). Articulate the reason why the project is being undertaken in terms of the issue, problem and/or opportunity that will be addressed by the project. Also include details of linkages with other projects – specifically, how this initiative supports other projects or how other project(s) rely on the benefits or outputs of this project.

Project approach and options considered

Identify the choice of solution and approach that will be used to deliver the intended project outcomes (eg modification of the existing product; purchasing a COTS rather than building a new product.) Provide a brief overview (no more than 3-4 sentences) of the options, if any, that were considered to achieve the intended project outcomes and explain why the selected option was preferred.

Expected benefits

Detail the key benefits that the project is expected to deliver. This does not need to be an exhaustive analysis but should be limited to the major benefits anticipated from the project.

Benefits should be expressed in measurable terms against the situation as it exists prior to the project. If relevant, explain how the benefit(s) will support University or budget centre strategic goals.

Anticipated side effects

Provide a summary of any outcomes which may be perceived as negative by one or more project stakeholders. Again, this does not need to be an exhaustive analysis but should be limited to those side effects considered major.

Unlike risks (where there is some uncertainty as to whether the outcome will eventuate), side effects are actual consequences of an activity. For example, a side effect arising from a decision to merge two elements of an organisation on a new site may be a drop in productivity during the merger.

Key risks

Highlight the key risks to the project, together with the likelihood of, and strategies for mitigating, each risk. This does not need to be an exhaustive analysis but should instead be limited to the key or major risks (no more than six) that must be kept in mind when undertaking the project. Provide a link to the project risk register if one is already in place.

http://www.utas.edu.au/risk-management-audit-assurance/risk-managment

Compliance commitments

Highlight the key compliance commitments to the project; consider legislation that may be impacted by this change. For information regarding legislation that applies to the University, refer to the UTAS Legal Compliance Register: http://www.utas.edu.au/risk-management-audit-assurance/compliance.

For example:

* The Work Health and Safety Act 2012 will have specific requirements of capital works submissions.
* Personal Information Projection Act 2004 can be significantly impacted by any project dealing with information storage but primarily ICT projects.

Cost breakdown

Provide a high level breakdown of the costs associated with the project. The cost should be broken down by item or service, including: Equipment; Staffing; Project Management; Business Analysis; Training, as well as according to whether the cost constitutes capital expenditure or ongoing (operational) cost.

Use the following table to structure this information, adding or deleting items as relevant:

| Item/Service | Unit(s) Insert details of the number of unit(s) that are likely to be required – eg 2.0 FTE staff at HEO Level 6;1 new server; 10 licences etc.  | Estimated Cost ($) |
| --- | --- | --- |
| Capital expenditure |
| Project Management & Support |  |  |
| Business Analysis |  |  |
| Training |  |  |
| Ongoing costs |
| Equipment |  |  |
| Staffing |  |  |
|  |  |  |
| Total: |  | <Insert total cost> |

Complete a 5-year NPV of the project cost.

Scope

List at a high level the key outputs that the project will need to deliver, and activities that it will undertake, in order to achieve its objectives. Also provide a high level list of those outputs or activities that the project will not deal with.

Project plan

This section should explain how and when project objectives are to be achieved. This could include an overview of the major project milestones, project activities, broken down into related groupings of work (stages), and the key dates for completion.

Project team

Provide a list of the members of the project team. If it helps, use the following headings:

Budget centre team members

Provide a list of all members of the team from the client budget centre.

Vendor team members

Provide details of vendor representatives, if any, on the team.

Other team members

Provide details of other staff assigned to provide support for the project.

Project deliverables

Provide a breakdown of project deliverables (products), including the specific method by which the quality of each deliverable will be checked, the person responsible for each, and the planned date for delivery. The following table may be used to structure this information:

| Deliverable | Method of Quality Checking | Person Responsible | Planned Date |
| --- | --- | --- | --- |
|  |  |  |  |

Key dependencies

Detail the main external dependencies and prerequisites which are necessary for successful completion of the project. These might be points of dependency with other projects currently being undertaken or planned (eg Project A needs to deliver a certain product for this project to continue), or products or resources that are necessary for the project to be carried out.

Planning assumptions

Provide an overview of:

* the key planning assumptions that have been made in the development of this Plan. For example, assumptions may have been made about the number of quality reviews or rework required for each product; or it may be assumed that the information and resources need to produce the products of this stage are, in fact, available; and
* assumptions which have been made in relation to the delivery of the project more generally, such as staff availability, impact on stakeholders, benefits to be delivered.

Control mechanisms

This section should describe the controls (including tolerances) that will be adopted to ensure the project remains true to its objectives. Any or all of the following headings may be useful in structuring this section:

Tolerances

State any tolerances that have been set for the project, using the following table:

| Control | Permitted Variance |
| --- | --- |
| <eg Time> | <One month has been built into the plan> |
| <eg Cost> | <10% of total budget> |

Proposed Project Governance

Detail the proposed project governance structure for the project. Detail the Project Sponsor, whether the project will require a Project Steering Committee and who is in the committee if required, Project Manager, Independent External Oversight, working group etc.

| Title | Person/s (Title and Name) |
| --- | --- |
| Project Sponsor |  |
| Project Steering Committee | List all members |
| Project Manager |  |
| Project User Group | List all members |
| Project Working Group |  |
| Independent External Oversight |  |

Monitoring & reporting

Provide a summary of the monitoring and reporting mechanisms that will be adopted in relation to the project and the frequency with which each will be implemented, using the table that follows. These should be agreed with the Project Sponsor. Be sure to delete any mechanisms that will not be used and add any that are not already included.

| Control | Purpose | Frequency |
| --- | --- | --- |
| Project Status Report | Submitted to Project Sponsor to report on project status & progress.  | Monthly, unless otherwise agreed\* |
| Exception Report | Produced for Project Steering Committee (or Project Sponsor) when project is in danger of exceeding planning tolerances | As required |
| End Stage Report | Produced for the Project Sponsor to summarise events & achievements of current stage | At the end of each project stage\*\* |
| Scope  | Changes to scope are reported to the Project Steering Committee or Project Sponsor for approval | As required |
| Quality | Project products should meet quality expectations. A report to the Project Sponsor will be made should products fail to meet ITR or business standards or where quality control measures have not been followed | As required |
| Issue Log, Risk Register | Tool for registering & managing risks, issues & informal problems &/or concerns relating to the project | Updated as required |

\* if agreed otherwise, include details in Frequency cell

\*\* if there is more than one delivery stage. End Stage Report not required if there is only one delivery stage.

Authorisation of Scope Changes

Provide actuals of the delegations for scope changes as indicated by the table below.

| Governance Entity | ↑Functional Specification or Omission | ↓Functional Specifications |
| --- | --- | --- |
|  | Total Contingency | Individual Allocation |  |
| Project Manager | 10% of Total | ≤1% of Total | None |
| Project Sponsor | 20% of Total | ≤5% of Total | ≤2.5% |
| Project Steering Committee |  | 5 - 10% | All other |
| VC |  | Any spend above contingency but within delegations |  |
| Council |  | Any spend above contingency |  |

For example, a project has a budget of $10M and a contingency of $1M.The project must build a concert theatre with 500 seats.

| Governance Entity | ↑Functional Specification or Omission | ↓Functional Specifications |
| --- | --- | --- |
|  | Total Contingency | Individual Allocation |  |
| Project Manager | $100k | ≤$10k | None |
| Project Sponsor | $200k | ≤$50k | 488 seats |
| Project Steering Committee |  | $50k - $100k | 450 seats |
| VC |  | <$1M | 400 seats |
| Council |  | >$1M | <400 seats |

Communication & consultation

Provide details of the communication and consultation activities which will be undertaken and have been agreed with the client. This will include the frequency of formal and informal meetings between Project Manager and client, as well as how and what project updates will be communicated to affected parties.

Milestones

Provide details of the important progress markers (what will be achieved, and when) which will enable the Project Sponsor or Board to monitor progress. The following table can be used:

| Stage: <Insert Stage Details> |
| --- |
| Milestone | Target Date | Status |
|  |  |  |
|  |  |  |

High level timeline

Provide a high-level overview of the project timeline. A high-level Gantt chart should be used wherever possible.

Appendix 1: Gantt Chart template

|  |  |  |
| --- | --- | --- |
| Project Name:  | Project Manager:  | Date Prepared:  |

|  |  |  |  |
| --- | --- | --- | --- |
| Phase, activity, task | Person Response. | Work effort | Timeline |
| Description |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| Original planned end date will be met +/- (n) task now (n) weeks ahead or behind schedule C=task completed this week |