**Project Management Plan**

[AGENCY NAME]

[PROJECT NAME]

 Publish Date

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# Using this Template

This template contains “suggested language” and assumes that the author of this document will make appropriate additions, deletions, and changes for their specific project needs.

To create a document from this template:

* Replace [bracketed text] on the cover page, in the header, and throughout the document with your project and agency information by filling in the [bracketed text] area in the document text. Filling in the information once, will propagate that field throughout the document.
* Complete the entire template making all necessary adjustments
* Each section contains abbreviated instructions (**Green Font**) and an example using (**Black Font**).
* Delete this “Using This Template” page.
* Update the Table of Contents by clicking on the “References” tab, selecting “Update Table”, then “Update Entire Table” and click “Ok”.
* Save.

To provide any suggested improvements or corrections, please email TBSM.info@tn.gov.

# Revisions

| Revision | Description of Change | Author | Effective Date |
| --- | --- | --- | --- |
| v1 | Initial document upload to TBSM intranet site | BSD Team | 09/28/12 |
|  |  |  |  |
|  |  |  |  |

# Introduction

The Project Management Plan is a formal, approved document that defines how the project is executed, monitored, and controlled. It may be summary or detailed in nature, depending on the size of the project. For larger projects, the Project Management Plan will provide a summary and reference subsidiary management plans (i.e. Scope Management Plan, HR Plan, etc.). This plan should be tailored as appropriate depending on the size and needs of each individual project.

The Introduction section should provide a high level overview of the project and what is included in the Project Management Plan. This section should also include a high level description of the project and describe the project’s deliverables and benefits. Excessive detail is not necessary in this section as the other sections of the Project Management Plan will include this information. This section should provide a summarized framework of the project and its purpose. Review the Project Charter for information to include in this section.

Total Software Incorporated (TSI) has recently approved the [PROJECT NAME] project to move forward for project initiation within the research and development (R&D) group. This project will result in the development of new voice recognition software and supports TSI’s corporate strategy of providing progressive solutions to clients which improve productivity in both the workplace and home environment. While voice recognition software is currently available, TSI believes that new technological developments will enable our team to develop a solution far superior to what is currently available.

TSI has been successful in gaining market share because of its aggressive pursuit of product quality, ease of use, flexibility, and customer service. Additionally, customers understand that our products may be applied to a wide range of uses for business and personal functions. By leveraging our reputation for superior quality and user-friendly products, and capitalizing on new technology, TSI can position itself as the premier provider of effective and easy to use voice recognitions software in today’s marketplace.

# Project Management Approach

This section should outline the overall management approach for the project and should describe, in general terms, the roles and authorities of project team members. It should also include which organizations will provide resources for the project and any resource constraints or limitations. Decisions which must be made by specific individuals—for example authorizing additional funding by the Project Sponsor— should also be stated here. It should be written as an Executive Summary for the Project Management Plan contents that follow.

The Senior Project Director, Joe Green, has the overall authority and responsibility for managing and executing this project according to this Project Management Plan. The project team will consist of personnel from the coding group, quality control/assurance group, technical writing group, and testing group. The Senior Project Director will work with all resources to perform project planning. All project management plans will be reviewed and approved by the Project Sponsor. All funding decisions will also be made by the Project Sponsor. Any delegation of approval authority to the Senior Project Director should be done in writing and be signed by both the Project Sponsor and Senior Project Director.

The project team will be a matrix in that team members from each organization continue to report to their organizational management throughout the duration of the project. The Senior Project Director is responsible for communicating with organizational managers on the progress and performance of each project resource.

# Project Scope

State the scope of the project in this section. The Scope Statement from the Project Charter should be used as a starting point; however, the Project Management Plan needs to include a much more detailed scope than the Project Charter. This detail should include what the project does and does not include. The more detail included in this section, the better the product. This will help to clarify what is included in the project and help to avoid any confusion from project team members and stakeholders.

The scope of TSI’s [PROJECT NAME] project includes the planning, design, development, testing, transition, and implementation of the [PROJECT NAME] voice recognition software package. This software will meet or exceed organizational software standards and additional requirements established in the Project Charter. The scope of this project also includes completion of all documentation, manuals, and training aids to be used in conjunction with the software. Project completion will occur when the software and documentation package has been successfully executed and transitioned to TSI’s manufacturing group for production.

All [PROJECT NAME] project work will be performed internally and no portion of this project will be outsourced. The scope of this project does not include any changes in requirements to standard operating systems to run the software, software updates or revisions.

# Milestone List

This section should include a summary list of milestones including dates for each milestone. Include an introductory paragraph in this section which provides some insight to the major milestones. This section should also mention or discuss actions taken if any changes to the milestones or delivery dates are required.

The chart below lists the major milestones for the [PROJECT NAME] Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the Project Schedule and Work Breakdown Structure (WBS). If there are any scheduling delays which may impact a milestone or delivery date, the Senior Project Director must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the Senior Project Director.

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Date |
| Complete Requirements Gathering | All requirements for [PROJECT NAME] must be determined to provide a base for design upon | 2/28/12 |
| Complete [PROJECT NAME] Design | This is the theoretical design for the software and its functionality | 5/31/12 |
| Complete [PROJECT NAME] Coding | All coding completed resulting in software prototype | 7/31/12 |
| Complete [PROJECT NAME] Testing and Debugging | All functionality tested and all identified errors corrected | 8/31/12 |
| Complete Transition of [PROJECT NAME] to TSI Production | Completed software and documentation transitioned to operations group to begin production | 11/30/12 |

# Schedule Baseline and Work Breakdown Structure

This section should discuss the WBS, WBS Dictionary, and Schedule baseline and how they will be used to manage the project’s scope. The WBS provides the work packages to be performed for the completion of the project. The WBS Dictionary defines the work packages. The schedule baseline provides a reference point for managing project progress as it pertains to schedule and timeline. The schedule baseline and WBS should be created in the project scheduling software. The WBS can be exported from the project scheduling software.

The WBS for the [PROJECT NAME] Project is comprised of work packages which do not exceed 40 hours of work but are at least 4 hours of work. Work packages were developed through close collaboration among project team members and stakeholders with input from functional managers and research from past projects.

The WBS Dictionary defines all work packages for the [PROJECT NAME] Project. These definitions include all tasks, resources, and deliverables. Every work package in the WBS is defined in the WBS Dictionary and will aid in resource planning, task completion and ensuring deliverables meet project requirements.

The [PROJECT NAME] Project schedule was derived from the WBS and Project Charter with input from all project team members. The Project Schedule was completed, reviewed by the Project Sponsor, approved and base-lined. The Project Schedule will be maintained as a project Gantt chart by the [PROJECT NAME] Senior Project Director. Any proposed changes to the schedule will follow TSI’s change control process. If established boundary controls may be exceeded, a Change Request will be submitted to the Senior Project Director. The Senior Project Director and team will determine the impact of the change on the schedule, cost, resources, scope, and risks. If it is determined that the impacts will exceed the boundary conditions then the change will be forwarded to the Project Sponsor for review and approval. The [PROJECT NAME] boundary conditions are:

Cost Performance Index (CPI) less than 0.8 or greater than 1.2

Schedule Performance Index (SPI) less than 0.8 or greater than 1.2

If the change is approved by the Project Sponsor then it will be implemented by the Senior Project Director who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Control Process.

The Project Schedule Baseline and Work Breakdown Structure are provided in Appendix A, Project Schedule and Appendix B, Work Breakdown Structure.

# Activity List

One of the results of the Work Breakdown structure process is a comprehensive list of all schedule activities required on the project. This is the Activity List. The Activity List includes an Activity ID, its WBS ID, Activity Name and a detailed description of activity’s scope of work for each activity (Define Activities). The Activity List facilitates the sequencing of activities by identifying predecessors and successors and ordering the activities accordingly (Sequence Activities). Next is the estimation of resource types and quantities for each activity (Estimate Activity Resources). Finally, each activity’s effort and duration is estimated Estimate Activity Resources). At this stage the Activity List evolves into the tasks of the Project Schedule. The Activity List is not a formal deliverable of the project plan, requiring signatures. However, the Activity List is an invaluable tool for developing a complete and reliable Project Schedule and will be reviewed in-depth by project team members.

# Change Control Process

This section should describe the project change control process. Ideally, this process will be some type of organizational standard which is repeatable and applies to most or all projects when a change is necessary. Changes to any project must be carefully considered and the impact of the change must be clear in order to make any type of approval decisions. Many organizations have change control boards (CCBs) which review proposed changes and either approve or deny them. This is an effective way to provide oversight and ensure adequate feedback and review of the change is obtained. This section should also identify who has approval authority for changes to the project, who submits the changes, and how they are tracked and monitored.

For complex or large projects the Change Control Process may be included as an Appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Change Control Process document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The following steps comprise TSI’s organization change control process for all projects and will be utilized on the [PROJECT NAME] project:

**Identify and Submit Change Request**

This process provides the ability for any member of the project team to submit a request for a change to the project.

The Change Requester:

* Identifies a requirement for change to any aspect of the project (e.g. scope, deliverables, timescales and organization)
* Completes a Change Request form (CR) and distributes the form to the Senior Project Director. The CR summarizes the change:
	+ Description
	+ Reasons/Goals for changes
	+ Recommendations
	+ Impacts (Cost, Scope, Schedule, and/or Quality)
	+ Solution
	+ Disposition (Approve, Reject, Defer)

**Review Change Request**

The Senior Project Director/Change Control Gate Keeper reviews the CR and determines whether or not additional information is required for the Change Control Board to assess the full impact of the change to the project time, scope and cost. The decision will be based on factors, such as:

* Number of change options presented
* Feasibility and benefits of the change
* Complexity and/or difficulty of the change options requested
* Scale of the change solutions proposed.

The Senior Project Director/Change Control Gate Keeper will record the CR details in the Change Log to track the status of the change request.

**Managing Change Request**

The Senior Project Director/Change Control Gate Keeper will forward the Change Request Form and any supporting documentation to the Change Control Board (CCB) for review and final approval. The CCB will determine the feasibility of this change by examining factors, such as:

* Risk to the project in implementing/not implementing the change
* Impact on the project in implementing the change (time, resources, finance, quality).

After a formal review, the CCB may:

* Approve the change as requested
* Reject the change
* Defer the change
	+ Request more information related to the change
	+ Postpone to a later phase

Any team member or stakeholder may submit a Change Request for the [PROJECT NAME] Project. The [PROJECT NAME] Project Sponsor will chair the CCB and any changes to project scope, cost, or schedule must meet his approval. All change requests will be logged in the Change Log by the Senior Project Director and tracked through to completion whether approved or not.

# Communication Management Plan

The purpose of the Communication Management Plan is to define the communication requirements for the project and how information will be distributed to ensure project success. The Senior Project Director, Sponsor and other project leadership should give considerable thought to how to manage communications on every project. A solid Communication Management Plan will help avoid many project management problems. This section should provide an overview of the communications management approach. Generally, the Communication Management Plan defines the following:

* Communication requirements based on roles
* What information will be communicated
* How the information will be communicated
* When will information be distributed
* Who does the communication
* Who receives the communication
* Communications conduct

For larger and more complex projects, the Communication Management Plan may be included as an Appendix or separate document apart from the Project Management Plan.

For additional information, refer to the Communication Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The Communication Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of [PROJECT NAME] project team members as they pertain to communications. It also includes a Communications Matrix which maps the communication requirements and conduct for meetings and other forms of communication for the project. A Project Team Directory is also included to provide contact information for all stakeholders directly involved in the project.

The Senior Project Director will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate, and to whom to communicate.

|  |
| --- |
| **Communications Matrix** |
| **Communication Type** | **Description** | **Frequency** | **Format** | **Participants/ Distribution** | **Deliverable** | **Owner** |
| Weekly Status Report | Email summary of project status | Weekly | Email | Project Sponsor, Team and Stakeholders | Status Report | Senior Project Director |
| Weekly Project Team Meeting | Meeting to review action register and status | Weekly | In Person | Project Team | Updated Action Register | Senior Project Director |
| Project Monthly Review (PMR) | Present metrics and status to team and sponsor | Monthly | In Person | Project Sponsor, Team, and Stakeholders | Status and Metric Presentation | Senior Project Director |
| Project Gate Reviews | Present closeout of project phases and kickoff next phase | As Needed | In Person | Project Sponsor, Team and Stakeholders | Phase completion report and phase kickoff | Senior Project Director |
| Technical Design Review | Review of any technical designs or work associated with the project | As Needed | In Person | Project Team | Technical Design Package | Senior Project Director |

The Project Team Directory for all communications is as follows:

| **Project Team Directory** |
| --- |
| **Name** | **Title** | **E mail** | **Office Phone** | **Mobile Phone** |
| John Davis | Project Sponsor | j.davis@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Joe Green | Senior Project Director | j.green@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Herb Walker | Senior Programmer | h.walker@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Jason Black | Programmer | j.black@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Mary White | Sr. Quality Specialist | m.white@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Ron Smith | Quality Specialist | r.smith@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Tom Sunday | Technical Writer | t.sunday@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |
| Karen Brown | Testing Specialist | k.brown@tsi.com | xxx-xxx-xxxx | xxx-xxx-xxxx |

**Communications Conduct**

Meetings:

The Senior Project Director will distribute a meeting agenda at least 2 days prior to any scheduled meeting. All participants are expected to review the agenda prior to the meeting. During all project meetings the timekeeper will ensure that the group adheres to the times stated in the agenda. The recorder will capture all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive on time to the project meetings. All cell phones and blackberries should be turned off or set to vibrate mode to minimize distractions. Meeting minutes will be distributed no later than 24 hours after each meeting is completed.

Email:

All email pertaining to the [PROJECT NAME] Project should be brief, professional, and free of errors. Email should be distributed to the correct project participants in accordance with the communication matrix above. All attachments should be in one of the organization’s standard software suite programs and adhere to established company formats. If the purpose of the email is to bring an issue forward for discussion, the email should provide background information, a description, and a recommendation to correct the issue. The Senior Project Director should be included on any email pertaining to the [PROJECT NAME] Project.

Informal Communications:

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Senior Project Director so the appropriate action may be taken.

# Cost Management Plan

The Cost Management Plan clearly defines how the costs on a project will be managed throughout the project lifecycle. It sets the format and standards by which the project costs are measured, reported, and controlled. To ensure successful completion of the project, it is imperative that all project team members work within the cost management guidelines. These guidelines may include description of the WBS cost accounts which will be created in and the establishment of acceptable variances. The Cost Management Plan:

* Identifies who is responsible for managing costs
* Identifies who has the authority to approve changes to the project or its budget
* How cost performance is quantitatively measured and reported upon
* Report formats, frequency and to whom they are presented

For complex or large projects, the Cost Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Cost Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The Senior Project Director will be responsible for managing and reporting on the project’s cost throughout the duration of the project. The Senior Project Director will present and review the project’s cost performance during the monthly project status meeting. Using earned value calculations, the Senior Project Director is responsible for accounting for cost deviations and presenting the Project Sponsor with options for getting the project back on budget. All budget authority and decisions to include budget changes reside with the [PROJECT NAME] Project Sponsor.

For the [PROJECT NAME] Project, control accounts will be created at the fourth level of the WBS which is where all costs and performance will be managed and tracked. Financial performance of the [PROJECT NAME] Project will be measured through earned value calculations pertaining to the project’s cost accounts. Work started on work packages will grant that work package with 50% credit; whereas, the remaining 50% is credited upon completion of all work defined in that work package. Costs may be rounded to the nearest dollar and work hours rounded to the nearest whole hour.

Cost and Schedule Performance Index (CPI and SPI respectively) will be reported on a monthly basis by the Senior Project Director to the Project Sponsor. Variances of 10% or +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to yellow or cautionary. These will be reported and if it is determined that there is no or minimal impact on the project’s cost or schedule baseline then there may be no action required. Cost variances of 20%, or +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to red or critical. These will be reported and require corrective action from the Senior Project Director in order to bring the cost and/or schedule performance indexes back in line with the allowable variance. Any corrective actions will require a project change request and be must approved by the CCB before it can be implemented.

Earned value calculations will be compiled by the Senior Project Director and reported at the monthly project status meeting. If there are indications that these values will approach or reach the critical stage before a subsequent meeting, the Senior Project Director will communicate this to the Project Sponsor immediately.

# Procurement Management Plan

The Procurement Management Plan should be defined enough to clearly identify the necessary steps and responsibilities for procurement from the beginning to the end of a project. The Senior Project Director must ensure that the plan facilitates the successful completion of the project and does not become an overwhelming task in itself to manage. The Senior Project Director will work with the project team, contracts/purchasing department, and other key players to manage the procurement activities.

For larger projects or projects with more complicated procurement management requirements, the Procurement Management Plan can be included as a separate document apart from the Project Management Plan.

For additional information, refer to the Procurement Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The Senior Project Director will provide oversight and management for all procurement activities under this project. The Senior Project Director is authorized to approve all procurement actions up to $50,000. Any procurement actions exceeding this amount must be approved by the Project Sponsor.

While this project requires minimal or no procurement, in the event procurement is required, the Senior Project Director will work with the project team to identify all items or services to be procured for the successful completion of the project. The Senior Project Director will then ensure these procurements are reviewed by the Program Management Office (PMO) and presented to the contracts and purchasing groups. The contracts and purchasing groups will review the procurement actions, determine whether it is advantageous to make or buy the items and begin the vendor selection, purchasing and the contracting process.

In the event procurement becomes necessary, the Senior Project Director will be responsible for managing any selected vendor or external resource. The Senior Project Director will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the purchasing and contracts groups.

# Project Scope Management Plan

It is important to clearly define and document the approach to managing the project scope. Failure to clearly establish and communicate project scope can result in delays, unnecessary work, failure to achieve deliverables, cost overruns, or other unintended consequences. This section provides a summary of the Scope Management Plan which addresses the following:

* Role(s) with authority and responsibility for scope management
* How the scope is defined (i.e. Scope Statement, WBS, WBS Dictionary, Statement of Work, etc.)
* How the scope is measured and verified (i.e. Quality Checklists, Scope Baseline, Work Performance Measurements, etc.)
* The scope change process (who initiates, who authorizes, etc.)
* Role(s) responsible for accepting the final project deliverable and approves acceptance of project scope

For complex or large projects, the Scope Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Scope Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The Senior Project Director is ultimately responsible for scope management for the [PROJECT NAME]. The scope for this project is defined by the Scope Statement, WBS, and WBS Dictionary. The Senior Project Director, Sponsor, and Stakeholders will establish and approve documentation for measuring project scope. This documentation includes deliverable quality checklists and work performance measurements.

Proposed scope changes may be initiated by the Senior Project Director, Stakeholders or any member of the project team. All change requests will be submitted to the Senior Project Director for review and evaluation. Upon acceptance of the scope change request, the Senior Project Director will submit the request to the Change Control Board and Project Sponsor for acceptance. Upon approval of scope changes by the Change Control Board and Project Sponsor the Senior Project Director will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Senior Project Director and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

The Project Sponsor is responsible for formally accepting the project’s final deliverable. This acceptance will be based on a review of all project documentation, testing results, beta trial results, and completion of all tasks/work packages and product functionality.

# Schedule Management Plan

This section provides a general framework for the approach which will be taken to create the project schedule. Effective schedule management is necessary for ensuring tasks are completed on time, resources are allocated appropriately, and to help measure project performance. This section should include discussion of the scheduling tool/format, schedule milestones, and schedule development roles and responsibilities.

For complex or large projects, the Schedule Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Schedule Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

Project schedules for the [PROJECT NAME] Project will be created using MS Project 2007 starting with the deliverables identified in the project’s Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved the Project Sponsor will review, approve, and baseline the schedule.

In accordance with TSI’s organizational standard, the following items will be designated as milestones for all project schedules:

* Completion of scope statement and WBS/WBS Dictionary
* Base lined project schedule
* Approval of final project budget
* Project kick-off
* Approval of roles and responsibilities
* Requirements definition approval
* Completion of data mapping/inventory
* Project implementation
* Acceptance of final deliverables

Roles and responsibilities for schedule development are as follows:

The Senior Project Director will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the project team. The Senior Project Director will also create the project schedule using MS Project 2007 and validate the schedule with the project team, stakeholders, and the Project Sponsor. The Senior Project Director will obtain schedule approval from the Project Sponsor and baseline the schedule.

The project team is responsible for participating in work package definition, sequencing, duration, and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The Project Sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is base lined.

The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

# Quality Management Plan

This section discusses how quality management will be used to ensure that the deliverables for the project meet a formally established standard of acceptance. All project deliverables should be defined in order to provide a foundation and understanding of the tasks at hand and what work must be planned. Quality management is the process by which the organization not only completes the work, but completes the work to an acceptable standard. Without a thorough Quality Management Plan, work may be completed in a substandard or unacceptable manner. This section should include quality roles and responsibilities, quality control, quality assurance, and quality monitoring.

For complex or large projects, the Quality Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Quality Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

All members of the [PROJECT NAME] project team will play a role in quality management. It is imperative that the team ensures that work is completed at an adequate level of quality from individual work packages to the final project deliverable. The following are the quality roles and responsibilities for the [PROJECT NAME] Project:

The Project Sponsor is responsible for approving all quality standards for the [PROJECT NAME] Project. The Project Sponsor will review all project tasks and deliverables to ensure compliance with established and approved quality standards. Additionally, the Project Sponsor will sign off on the final acceptance of the project deliverable.

The Senior Project Director is responsible for quality management throughout the duration of the project. The Senior Project Director is responsible for implementing the Quality Management Plan and ensuring all tasks, processes, and documentation are compliant with the plan. The Senior Project Director will work with the project’s quality specialists to establish acceptable quality standards. The Senior Project Director is also responsible for communicating and tracking all quality standards to the project team and stakeholders.

The Quality Specialists are responsible for working with the Senior Project Director to develop and implement the Quality Management Plan. Quality Specialists will recommend tools and methodologies for tracking quality and standards to establish acceptable quality levels. The Quality Specialists will create and maintain Quality Control and Assurance Logs throughout the project.

The remaining members of the project team, as well as the stakeholders, will be responsible for assisting the Senior Project Director and Quality Specialists in the establishment of acceptable quality standards. They will also work to ensure that all quality standards are met and that any concerns regarding quality are communicated to the Senior Project Director.

Quality control for the [PROJECT NAME] Project will utilize tools and methodologies for ensuring that all project deliverables comply with approved quality standards. To meet deliverable requirements and expectations, a formal process in which quality standards are measured and accepted should be implemented. The Senior Project Director will ensure all quality standards and quality control activities are met throughout the project. The Quality Specialists will assist the Senior Project Director in verifying that all quality standards are met for each deliverable. If any changes are proposed and approved by the Project Sponsor and CCB, the Senior Project Director is responsible for communicating the changes to the project team and updating all project plans and documentation.

Quality assurance for the [PROJECT NAME] Project will ensure that all processes used in the completion of the project meet acceptable quality standards. These process standards are in place to maximize project efficiency and minimize waste. For each process used throughout the project, the Senior Project Director, with the assistance of the Quality Specialists, will track and measure quality against the approved standards to ensure all standards are met. If any changes are proposed and approved by the Project Sponsor and CCB, the Senior Project Director is responsible for communicating the changes to the project team and updating all project plans and documentation.

# Risk Management Plan

This section provides a general description for the approach taken to identify and manage the risks associated with the project. It should be a short paragraph or two summarizing the approach to risk management on this project.

For complex or large projects, the Risk Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document.

For additional information, refer to the Risk Management Plan document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

The approach for managing risks for the [PROJECT NAME] Project includes a methodical process by which the project team identifies, scores, and ranks the various risks. Every effort will be made to proactively identify risks ahead of time in order to implement a mitigation strategy from the project’s onset. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk’s planned timeframe.

Upon the completion of the project, during the closing process, the Senior Project Director will analyze each risk as well as the risk management process. Based on this analysis, the Senior Project Director will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

# Risk Register

For an example of a Risk Register, refer to the Risk Register document located on the Tennessee Business Solutions Methodology (TBSM) intranet site.

# Human Resource Plan

This section should contain a summary of the approach to project staffing. This section should include discussion on projected organizational structure for this project. This section should also include how resources will be procured and managed, and should also identify any key resources needed for the project.

The [PROJECT NAME] Project will consist of a matrix structure with support from various internal organizations. All work will be performed internally. Staffing requirements for the [PROJECT NAME] Project include the following:

Senior Project Director (1 position) – responsible for all management for the [PROJECT NAME] Project. The Senior Project Director is responsible for planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.

Senior Programmer (1 position) – responsible for oversight of all coding and programming tasks for the [PROJECT NAME] Project as well as ensuring functionality is compliant with quality standards. Responsible for working with the Senior Project Director to create work packages, manage risk, manage schedule, identify requirements, and create reports. The Senior Programmer will be managed by the appropriate agency team member who will provide performance feedback to the functional manager.

Programmer (1 position) – responsible for coding and programming for the [PROJECT NAME] Project. All coding and programming tasks will be reviewed by the Senior Programmer prior to implementation. Responsibilities also include assisting with risk identification, determining impacts of change requests, and status reporting. The Programmer will be managed by the appropriate agency team member and feedback will be provided to the functional manager for performance evaluations by the Senior Project Director and Senior Programmer.

Senior Quality Specialist (1 position) – responsible for assisting the Senior Project Director in creating quality control and assurance standards. The Senior Quality Specialist is also responsible for maintaining quality control and assurance logs throughout the project. The Senior Quality Specialist will be managed by the appropriate agency team member who will also provide feedback to the functional manager for performance evaluations.

Quality Specialist (1 position) – responsible for assisting the Senior Project Director and Senior Quality Specialist in creating and tracking quality control and assurance standards. The Quality Specialist will have primary responsibility for compiling quality reporting and metrics for the Senior Project Director to communicate. The Quality Specialist will be managed by the appropriate agency team member who will provide feedback, along with the Senior Quality Specialist to the functional manager for performance evaluations.

Technical Writer (1 position) – responsible for compiling all project documentation and reporting into organizational formats. The Technical Writer is responsible for assisting the Senior Project Director in Configuration Management and revision control for all project documentation, acting as a scribe during all project meetings, and maintaining all project communication distribution lists. The Technical Writer will be managed by the appropriate agency team member who will also provide feedback to the functional manager for performance evaluations.

Testing Specialist (1 position) – responsible for helping establish testing specifications for the [PROJECT NAME] Project with the assistance of the Senior Project Director and Programmers. The Testing Specialist is responsible for ensuring all testing is complete and documented in accordance with TSI standards, and for ensuring all testing resources are coordinated. The Testing Specialist will be managed by the appropriate agency team member who will also provide feedback to the functional manager for performance evaluations.

The Senior Project Director will negotiate with all necessary TSI functional managers in order to identify and assign resources for the [PROJECT NAME] Project. All resources must be approved by the appropriate functional manager before the resource may begin any project work. The project team will not be co-located for this project and all resources will remain in their current workspace.

# Resource Calendar

A Resource Calendar should be included as part of the project plan. The resource calendar identifies key resources needed for the project and the times/durations they will be needed. Some resources may be needed for the entire length of the project while others may only be required for a portion of the project. This information must be agreed to by the Project Sponsor and Functional Managers prior to beginning the project.

The [PROJECT NAME] Project will require all project team members for the entire duration of the project although levels of effort will vary as the project progresses. The Project is scheduled to last one year with standard 40 hour work weeks. If a project team member is not required for a full 40 hour work week at any point during the project, their efforts outside of the [PROJECT NAME] Project will be at the discretion of their Functional Manager.



# Cost Baseline

This section contains the cost baseline for the project upon which cost management will be based. The project will use earned value metrics to track and manage costs and the cost baseline provides the basis for the tracking, reporting, and management of costs.

The cost baseline for the [PROJECT NAME] project includes all budgeted costs for the successful completion of the project.

|  |  |  |
| --- | --- | --- |
| **Project Phase** | **Budgeted Total** | **Comments** |
| Planning | $350,000 | Includes work hours for all project team members for gathering requirements and planning project |
| Design | $250,000 | Includes work hours for all project team members for work on [PROJECT NAME] conceptual design |
| Coding | $200,000 | Includes all work hours for coding of [PROJECT NAME]  |
| Testing | $175,000 | Includes all work hours for testing (including beta testing) of [PROJECT NAME] software |
| Transition and Closeout | $150,000 | Includes all work hours for transition to operations and project closeout |

# Quality Baseline

This section should include the quality baseline for the project. The purpose of this baseline is to provide a basis for ensuring that quality can be measured to determine if acceptable quality levels have been achieved. It is important for all projects to clearly define and communicate quality standards and the quality baseline serves this purpose.

The [PROJECT NAME] Project must meet the quality standards established in the quality baseline. The quality baseline provides the acceptable quality levels of the [PROJECT NAME] Project. The software must meet or exceed the quality baseline values in order to achieve success.

| **Item** | **Acceptable Level** | **Comments** |
| --- | --- | --- |
| Voice Recognition | At least 98% recognition level with 2% or less errors in text | Using standard TSI English language databases |
| Compatibility | No errors associated with running software with compatible applications | Using the \_\_\_\_\_\_\_ suite of applications |
| Supporting Documentation | Less than 1% failure rate in beta testing new users to run setup and execute software functionality |  |

# Acceptance

(This section should be modified for best application to specific projects. Include all project team members that should have some level of authority regarding document review and approval.)

Approved by:

 Date:

<Approvers Name>

[PROJECT NAME] Executive Sponsor

 Date:

<Approvers Name>

[PROJECT NAME] Business Sponsor

 Date:

<Approvers Name>

[PROJECT NAME] Project Director/Manager

 Date:

<Approvers Name>

[PROJECT NAME] Stakeholder