**Scope Statement**

[AGENCY NAME]

[PROJECT NAME]

**[Publish Date]**

**Table of Contents**

[Using this Template 1](#_Toc438536116)

[Revisions 2](#_Toc438536117)

[executive summary 3](#_Toc438536118)

[business objectives 3](#_Toc438536119)

[Project Scope Statement 4](#_Toc438536120)

[Scope Approach 7](#_Toc438536121)

[Acceptance 8](#_Toc438536122)

# 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 Scope Statement is an expansion of the information outlined within the Project Charter. It is used to obtain agreement among the Senior Project Director, Project Sponsor, and Project Stakeholders in defining the project’s deliverables and the work necessary to create these deliverables. Preparing a detailed scope statement is critical to the success of the project, and builds upon many documents created in earlier project phases.

# executive summary

Provide a brief summary of the project using the Project Charter and/or Business Case as a basis. This section should state what is included and what is not included in the project scope.

The Office of the Photo Reprints (OPR) is responsible for the creation and maintenance of a

Statewide historic photograph system housing pre-1975 photos of State government parks and buildings. OPR oversees a centralized electronic system for the processing of photo reprint requests, and coordinates the work of OPR staff and in 15 local offices in all State of Tennessee counties Annually, these services include the issuance of over 300,000 reprints and certificates of authenticity (COA) for historic photographs, and cataloging more than 150,000 new photographs each year.

# business objectives

The business objectives/business need section should be stated in business terms and should provide an understanding of:

* What created the need, or how the opportunity was recognized
* The magnitude of the need/opportunity
* Contributing factors, such as a workload increases or staff reductions and fiscal constraints
* An understanding of the extent to which the need/opportunity would be addressed if an appropriate alternative were implemented.
* The consequences for the State and its customers if the need or opportunity is not addressed

Understanding the magnitude of the need or opportunity, the Project Director will be better able to estimate reasonable amounts of resources to expend for the project, and the extent to which a response will address the business needs.

A statement of the business vision helps ensure traceability in the project. Business goals and objectives are linked back to the vision, and each project objective is also linked to the business vision. Business objectives can be stated as business measures, such as increasing profits by 20%.

The OPR is required to provide timely, accurate and appropriate information to effectively serve communities and allow other authorized agencies to obtain information and data from this system. However, the current photo management system is outdated and has difficulty meeting the growing business demands for historic reprints and information. A re-designed system will address existing problems resulting from an outdated system. This system will allow for more timely and accurate processing of reprint requests from State agencies and the general public. A more efficient system is also expected to increase the revenue provided by this State office.

# Project Scope Statement

1. **Scope Description**

**Includes:** (Describe the functionality that is included within the project.)

* Web-based historic reprint request functionality
* Real-time status of request
* Online payment processing via credit, debit, or PayPal
* Online COA requests
* Reporting of requests received and processed
* Collecting and storing historic images

**Does Not Include:** (Describe the functionality or elements related to the project that are not included.)

* Storage of historic photos taken after 1975
* Interfaces with other agencies
1. **Completion Criteria**

Describe what will be created in terms of deliverables (and their characteristics) and/or what constitutes a successful project completion.

The system will provide functionality in all activities for historic photo cataloging and reprint services. These activities include the following:

* Reprint historic photos
* Perform historic photo search
* Catalog and store historic photos
* Collect and process reprint requests
* Collect and process COA requests
* Print/reprint COAs
* System & Table User Administration
* Technical Requirements
* Security Requirements
* Edit photo data
* Provide utilization and revenue reports
* Process online payments
1. **Deliverables**

Deliverables are tangible products or things that the project will produce, stated at a high level. They describe what the state agency and its customers will get when the project is done. It is important to also state exclusions, or what will not be included in the project. Deliverables will be detailed elsewhere in the project plan.

The new application will contain the following modules:

* Historic Photo search and reprint
	+ Users: OPR Authorized Staff, State Agencies, General Public
* COA validation and reprint
	+ Users: OPR Authorized Staff, State Agencies, General Public
* Payment Module
	+ Users: OPR Authorized Staff, State Agencies, General Public
* Historic Photo Catalog
	+ Users: OPR Authorized Staff
* Administration
	+ Users: OPR Authorized Staff
1. **Risk Assessment**

This section should describe the top two or three projects risk and a high-level mitigation plan. This brief assessment will be expanded in the formal Risk Management Plan which is completed as part of the Project Management Plan.

The high-level risks listed below were identified during the preliminary OPR risk assessment:

* This project involves many State agencies and the general public.
* The application is likely to be highly customized for unique OPR requirements.
* Initial estimates of project effort have exceeded 6000 hours.
* Contractors may work off-site.
* Some State resources may not be available to work at 100% allocation to this project.
* The implementation timeframe falls within the months leading up to state and local elections, and could potentially impact availability of State resources due to increased volume of reprint requests.
1. **Constraints**

All projects have constraints, and these should be defined from the outset. Projects have resource limits in terms of people, money, time and equipment.

* The funding for this project is constrained by Federal guidelines. Therefore, to receive full funding for the system, the project must be complete and in production by XX/XX/XXXX.
* To ensure adequate time is available for testing and issue resolution, development must be complete by XX/XX/XXXX.
* All Security standards must be considered.
* The system must be hosted on the State network.
1. **Dependency Linkages**

In some cases, one project may be dependent upon another project’s deliverables. This linkage needs to be identified and its progress monitored. In other cases, a project may be dependent upon information from several agencies. Therefore, the tasks and activities of the information gathering process need to be monitored.

The Department of Space Planning is in the process of implementing a redesign of several State-owned office buildings. For proper historic preservation of the building images, this project includes tasks for providing information and photos to OPR.

1. **Impacts**

Organizational change management, retraining, increases/decreases in operating budgets are example impacts.

The implementation of a new system within OPR will dramatically change the manner in which the department does business on a daily basis. For example, in the current system, reprint requests are taken via phone and keyed into the system by OPR staff. Going forward, it is estimated that 80% of reprint requests will occur online via the customer and public facing website. The current OPR staff will be required to undergo intensive training on the new system so that they can be prepared to resolve issues via phone and guide customers through the process.

1. **Measures of Project Success**

This section should describe the metrics that will be used on the project to determine how success will be measured. Such metrics may include how to measure customer satisfaction or may state what “user friendly” system is.

The new system should be user-friendly and allow the activities of the OPR department to occur in a more efficient and effective manner. Within the first year of implementation, revenues are expected to increase by 25% and the time to process should decrease by 15%.

1. **Assumptions**

Project assumptions should be defined before the project activities take place so that time is not spent on a project that has no basis for funding. For example, support and attention will be provided by the Business Sponsor and the Steering Committee, resources will be available to adequately staff the project, etc.

* Monetary funding is available
* Project is supported by Executive staff and a Steering Committee will be appointed to guide and monitor the project activities.
* OPR staff is available to work with the vendor in the roles of project manager, developer, and testing.
1. **Critical Success Factors**

Describe those factors that will ensure the success or failure of the project. For example, the Organizational Change Management Plan will be accepted, the system infrastructure environment will be adequate, etc.

The new web-based OPR System will allow State agencies and the general public to request photo reprints and COAs via an online request mechanism. This system will also allow user to pay for the reprints online

# Scope Approach

Planned Approach

Describe how the project will be implemented. For example, discuss phasing, outsourcing plans, or the hiring of temporary resources, creation of various testing environments, etc.

It is important that the approach to managing the projects’ scope be clearly defined and documented in detail. This section provides a summary of the Scope Statement in which it addresses the following:

* Who has authority and responsibility for scope statement
* 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.)
* Who is responsible for accepting the final project deliverable and approves acceptance of project scope

For the OPR project, creation of the scope statement will be the responsibility of the Senior Project Director. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Senior Project Director, Sponsor and Stakeholders will establish and approve documentation for measuring project scope which 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 provide estimate and impact to schedule and costs if any to the Senior Project Director who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Director will submit the scope change 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 Project Director will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Director and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

# 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