<PROJECT NAME>

PROJECT MANAGEMENT PLAN

Version Number: 1.0

Version Date: <mm/dd/yy>

Notes to the Author

[This document is a template of a Project Management Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

- *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 project documents; they are not mandatory formats.*

When using this template, the following steps are recommended:

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected) select File->Properties->Summary and fill in the appropriate fields within the Summary and Custom tabs.*

   After clicking OK to close the dialog box, update all fields throughout the document selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update each field individually by clicking on it and pressing F9.

   These actions must be done separately for any fields contained with the document's Header and Footer.

2. *Modify boilerplate text as appropriate for the specific project.*

3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*

4. *To update the Table of Contents, right-click on it and select "Update field" and choose the option - "Update entire table".*

5. *Before submission of the first draft of this document, delete this instruction section "Notes to the Author" and all instructions to the author throughout the entire document.*

VERSION HISTORY

[Provide information on how the development and distribution of the Project Management Plan will be controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version Number	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
1.0	*<Author name>*	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	*<description of change>*

TABLE OF CONTENTS

[Insert appropriate disclaimer(s)]

1   INTRODUCTION

1.1   PURPOSE OF PROJECT MANAGEMENT PLAN

[Provide the purpose of the project charter.]

The intended audience of the *<Project Name>* PMP is all project stakeholders including the project sponsor, senior leadership and the project team.

1.2   PROJECT CHARACTERIZATION

[Characterize the project by identifying the following key project attributes: HHS Strategic Goals, HHS Enterprise Architecture Business Segment(s), HHS Program(s), IT Investment (s), and IT Systems that are associated with this project.]

HHS Strategic Goals: *[Identify the specific HHS strategic goals to which this project aligns]*

HHS Enterprise Architecture Segment: *[Identify the HHS Segment Enterprise Architecture that this Project supports]*

HHS Programs: *[Identify the program(s) that this project impacts]*

HHS IT Investments: *[Identify the specific investment(s) in the HHS Portfolio Management Tool that are funding this project]*

HHS IT Systems: *[Identify any IT systems that will be impacted by this project]*

2   EXECUTIVE SUMMARY OF PROJECT CHARTER

[Provide an executive summary of the approved project charter. Provide a reference to the approved Project Charter. Elaborate on any sections within the Project Charter that need further detail contained within the PMP.]

2.1   ASSUMPTIONS/CONSTRAINTS

[Insert summary of any changes from the project assumptions and/or constraints that were originally outlined in the project charter.]

3   SCOPE MANAGEMENT

[Insert the project's scope management plan or provide a reference to where it is stored.]

3.1   WORK BREAKDOWN STRUCTURE

[Insert the project's work breakdown structure or provide a reference to where it is stored.]

3.2   DEPLOYMENT PLAN

[Example: The project involves deploying an application to state health partners. This section would discuss the approach for rolling out the application to the end users, including conducting environment assessments, developing memorandums

of understandings, hardware/software installation, data conversion.]

3.3 CHANGE CONTROL MANAGEMENT

[Example of Change Control: If a development server for your project is administered by another organization that is responsible for installing machine upgrades and there are scheduled outages that will impact your project schedule. Changes to the project will need to be made to deal with the potential impact of the scheduled outage.]

4 SCHEDULE/TIME MANAGEMENT

[Example of schedule management approach: Establish a baseline within the first two weeks of the project and monitor progress against the baseline on a weekly basis. The Project Manager will be responsible for ensuring the project schedule is updated with the latest information and never more than three business days out of date. For variances on executive milestones greater than 10%, the project may choose to use guidance specified by CPIC.]

4.1 MILESTONES

The table below lists the milestones for this project, along with their estimated completion timeframe.

Milestones	Estimated Completion Timeframe
[Insert milestone information (e.g., Project planned and authorized to proceed)]	*[Insert completion timeframe (e.g., Two weeks after project concept is approved)]*
[Add additional rows as necessary]	

4.2 PROJECT SCHEDULE

[Insert the project's schedule or provide a reference to where it is stored.]

4.2.1 Dependencies

[Insert the schedule/project dependencies (both internal and external).]

5 COST/BUDGET MANAGEMENT

[Insert the project's cost management plan or provide a reference to where it is stored.]

6 QUALITY MANAGEMENT

[Example: For an information system, controlling the consistency of screen layouts would include reviewing all screens to make sure they match the standards. Quality measures may be no bugs or defects for certain critical requirements, consistent screen layouts, or correctly calculating variables. Quality may be ensured through inspections, audits, formal testing and documentation of defects in a defect tracking system to ensure defects are fixed, retested and closed. Some projects may choose to use a traceability matrix to determine if critical requirements have been met.]

7 STAFFING MANAGEMENT

[Insert the project's human resource management plan or provide a reference to where it is stored.]

7.1 PROJECT TEAM TRAINING

[Insert the project team training plan or provide a reference to where it is stored.]

8 COMMUNICATIONS MANAGEMENT

[Insert the project's communication management plan or provide a reference to where it is stored.]

8.1 COMMUNICATION MATRIX

[Insert the project's communication matrix or provide a reference to where it is stored.]

Stakeholder	Messages	Vehicles	Frequency	Communicators	Feedback Mechanisms

9 RISK MANAGEMENT

[Insert the project's risk management plan or provide a reference to where it is stored.]

9.1 RISK LOG

[The Risk Log is normally maintained as a separate document. Provide a reference to where it is stored.]

10 ISSUE MANAGEMENT

[Insert the project's issue management plan or provide a reference to where it is stored.]

10.1 ISSUE LOG

[The Issue Log is normally maintained as a separate document. Provide a reference to where it is stored.]

11 ACQUISITION STRATEGY

[Example: This can include information such as ensuring project team members are assigned computers, how development and test servers are procured or can go into more detail and include an acquisition strategy that details how the project will be staffed (e.g., performance based fixed price contract, CITS contractors).]

12 COMPLIANCE-RELATED PLANNING

[Insert a list of compliance related processes the project must adhere to. Compliance related processes may include:

- *Capital Planning and Investment Control (CPIC)*
- *Security (including the C&A process)*
- *Enterprise Architecture*
- *Section 508 Compliance*
- *Records Management*
- *Privacy Impact Assessment (PIA)*
- *PHIN related requirements (PHIN Vocabulary and PHIN Messaging)]*

Appendix A: Project Management Plan Approval

The undersigned acknowledge that they have reviewed the *<Project Name>* **Project Management Plan** and agree with the information presented within this document. Changes to this **Project Management Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Owner, Project Manager (if identified), and any appropriate stakeholders. Add additional lines for signature as necessary.]

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name	Description	Location
<Document Name and Version Number>	*<Document description>*	*<URL or Network path where document is located>*

[Insert appropriate disclaimer(s)]

APPENDIX C: KEY TERMS

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
[Insert Term]	*<Provide definition of term and acronyms used in this document.>*