Project plan template

Introduction

Work your way through the plan section by section, filling in the empty boxes. Don’t feel you need to do it all in one go. It’s much better to take your time and get it right.

This template is just a helpful guide – some of the sections may not apply to your type of project so add or remove sections to suit you. Likewise, with all of the tables delete or add as many rows as you like. This is your plan so go ahead and adjust it until it fits you and your project perfectly.

Once you’re done with this introductory page, feel free to delete it. The same goes for the guidance notes and prompts included in italics throughout the template. You can keep them, delete them or save them in another document for referring to another time – it’s entirely up to you.

***Acknowledgements***

This document has been derived from a template prepared by the Department of Premier and Cabinet, Tasmania. The structure is based on the *Tasmanian Government Project Management Guidelines.*

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| --- |
| **<Project Name**  **Project Proposal** |
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**Document Acceptance and Release Notice**

This document is authorised for release once all signatures have been obtained.

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| PREPARED: |  | Date: |  | / |  | / |  |
| (for acceptance) | <Name>  < Position> |  |  | | | | |
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| ACCEPTED: |  | Date: |  | / |  | / |  |
| (for release) | <Name>  <Position> |  |  | | | | |

**Project Summary**

**Purpose**

*Provide a statement about the purpose of this document. For example:“to obtain feedback and/or to secure a decision to proceed with the proposed project”.*

The purpose of this document is <enter details>.

**Working Title for the Proposed Project**

*The working title is an interim title. It may change once the project is approved*. *Include both the abbreviation and long title.*

The working title for the project is the<Project Title> Project.

**Objective(s)**

*An objective is a high level description or statement of the overarching rationale for why the project is being conducted, and should be directly related to the Corporate Objectives and the business driver(s) for the project. It focuses on what the project is going to achieve, rather than what is produced. A project can have one or more objectives, which do not need to be measurable. Each should be listed as a single sentence.*

The objective of the <Project Title> Project is to <enter detail>

**Project Complexity**

*Provide a statement as to the expected complexity of the proposed project as well as an outline of how you have made this assessment. This information provides stakeholders/senior management with the opportunity to discuss and agree the complexity of the project. If it is decided the project is complex, a fully documented Business Case may be required.*

**Potential Benefits**

*Outline any perceived benefits to the organisation/ business from undertaking the project. These will be longer-term and the project must also identify measurable outcomes as part of the proposed scope.*

**Feasibility Statement**

*This section should make a statement about the feasibility of the proposed project, eg does the organisation have capacity and capability to deliver the project.*

**Recommendation**

*This section should provide a recommendation on whether or not the project should proceed.*

**Business Assessment**

**Situation Assessment and Problem Statement**

*This section should clearly establish the benefit to the organisation of proceeding with the proposed project. It should contain:*

* *a description of the relevant environmental conditions;*
* *an assessment of how the business needs are currently being met or not met;*
* *an analysis of the gap between the current situation and the stated objective(s).*

**Options considered**

*List the options that you have considered to date. Some options that may need to be identified and analysed are:*

* *Option 1- Do nothing*
* *Option 2 - An option that would achieve the same result as the preferred option*
* *Option 3 - The preferred option*

**Consultation**

*Provide a summary of any consultation with stakeholders undertaken to date and their respective levels of support for the concept. Initial negative support may indicate increased risk for the proposed project.*

**Proposed Scope**

*Based on the information outlined in Section 2 for the preferred option, begin to scope the project that will implement the recommended option and describe how the project will be managed. The information in the following sub-sections are important, as they will form the basis of a Project Business Plan if the project/initiative proceeds.*

**Scope Definition**

*Outline the broad scope of the proposed project, including any assumptions or constraints that may be relevant.*

**Table <n>: <Project> Proposed Scope**

|  |  |
| --- | --- |
| **Element** | **Detail** |
| Objective | *See section 1.2 of this template* |
| Outcome | *You may not be able to identify and specify target outcomes for the proposed project at this point. The broad business outcomes should be specified as a minimum.* |
| Output | *Outputs are the products, services, business or management practices that will be required (produced) to meet the identified outcomes.* |
| Quality Criteria | *What criteria will be used to judge whether outputs are fit-for-purpose* |
| Customer(s) | *The person or entities that will utilise the project outputs to generate the outcomes* |

**Assumptions**

*It is essential that assumptions made during the planning process are recognised and recorded, for example resource availability, environment, technology, security etc.*

The main assumptions are:

**Constraints**

*Constraints are known limitations within which the project must work, for example deadlines, finance and budget, legislation etc.*

The main constraints are:

**Scope of Work**

*The scope of work is defined as the processes that are required to produce the project outputs.*

*The following table initially identifies all of the project work that clearly falls within the scope of the project, that which is outside the scope, and any work that requires further consideration.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table <n>: <Project Title> Scope of Work** | | | | |
| **Part of the Project (Inside Scope)** | **Responsibility** | **Not Part of the Project (Outside Scope)** | **Responsibility** | **Uncertain or Unresolved** |
| *Training operational staff to use the new system* | *Project Manager* |  |  |  |
|  |  | *Updating the induction manuals* | *HR Section* | *timeline for completion* |

*Where the project is dependent on other work being completed (ie. outside the scope of the project), agreement must be sought as to who is responsible and timelines for completion.*

**Implementation Strategy**

*Briefly outline the time and resources (both human and financial) that are required to undertake the work to produce the outputs.*

The estimated resources that will be required to implement the proposed project are detailed in table <n> below.

|  |  |  |
| --- | --- | --- |
| **Table <n>: <Project Title> Project Implementation Strategy** | | |
| **Element** | **Detail** | **Issues** | |
| Project Schedule | *Outline the expected timeframe for delivery of the project. For example: The project is expected to commence on <dd/mm/yy> and be completed by <dd/mm/yy>* | *List any issues or notes that may be relevant to the scheduling, for example, where estimations have been used. You may also wish to identify any allowances or tolerances (the % of change in schedule that the project manager may accept without reference to the Steering Committee)* | |
| Budget Estimate | *Outline the expected budget for the project including estimates of any ongoing costs of supporting the project outputs as they are often overlooked.* | *List any issues or notes that may be relevant to the budget, for example, where estimations have been used. You may also wish to identify any allowances or costing sensitivities relevant to the budget estimate. For example, the cost of materials.* | |
| Other Resources | *List other resourcing requirements, for example accommodation, IT equipment and information requirements.* | *List any issues or notes that may be relevant to the resources, for example, where estimations have been used* | |

**Project Management Outline**

**Governance**

*List the parties who will form the governance structure for the project if approved.*

*As a minimum you will need in your governance structure a:*

* *Project Sponsor[[1]](#footnote-1)*
* *Business Owner*
* *Project Manager*

*As the project evolves, assuming it is approved, you may add one or more of the following parties in your governance structure:*

* *Project Team*
* *Steering Committee*
* *Reference Groups*
* *Working Group, and/or*
* *Quality Consultants*

*Note: In small projects, Steering Committees are generally not established and it may be more practical to identify existing groups or committees you will report to on progress of the project.*

The Project’s governance structure is based on the *Tasmanian Government Project Management Guidelines Version 6.0* prepared by the Department of Premier and Cabinet.

**Key Risks and Issues**

*List any major risks or issues identified through consultation. Keep in mind that assumptions, constraints and issues related to project schedule, budget estimate and resources identified in this proposal may also need to be considered as issues and risks to the project.*

These major risks or issues will be investigated further should the project proceed:

1. In many cases the Project Sponsor will also be the Business Owner. [↑](#footnote-ref-1)