**ITSW101-1 IT PROJECT PLAN**

**< ORGANIZATION >**

**< PROJECT NAME >**

**Document Revision  
Date of Issue:**

#### Approval Signatures

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| Prepared By Product Manager |  | Prepared By Project Manager |
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#### Document Change Control

This section provides control for the development and distribution of revisions to the Project Charter up to the point of approval. The Project Charter does not change throughout the project life cycle, but rather is developed at the beginning of the project (immediately following project initiation approval, and in the earliest stages of project planning).

The Project Charter provides an ongoing reference for all project stakeholders. The table below includes the revision number (defined within your Documentation Plan Outline), the date of update/issue, a brief description of the context and/or scope of the changes in that revision, and the person responsible for authoring the changes.

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#### Editor’s Note:

ITSW101-1 IT PROJECT PLANis adapted from the IEEE Standards for Software Project Management Plans, #1058-1998, and from the data requirements of ISO standard 12207 Software Life Cycle Processes. It is designed as a guide used to begin the project development plan. The plan should be dynamic, changing with project changes, but keeping the overall development plan well documented.

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# PROJECT OVERVIEW

This section of the IT Project Management Plan provides an overview of the purpose, scope and objectives of the project for which the Plan has been written, the project assumptions and constraints, a list of project deliverables, a summary of the project schedule and budget, and the plan for evolving the IT Project Management Plan.

## Purpose, Scope, and Objectives

Describe the purpose, scope and objectives of the project. Explain how they fit within a broader vision of any overall program or product life cycle. Describe what is out of scope as well. Describe the business or system needs being satisfied by the project. Provide a reference to any requirements descriptions that drive this project.

* Define the purpose and scope of the project.
* Describe any considerations of scope or objectives to be excluded from the project or the deliverables.
* Ensure that the statement of scope is consistent with similar statements in the business case, the project charter and any other relevant system‑level or business‑level documents.
* Identify and describe the business or system needs to be satisfied by the project.
* Provide a concise summary of:
* The project objectives;
* The deliverables required to satisfy the project objectives; and
* The methods by which satisfaction of the objectives will be determined.
* Describe the relationship of this project to other projects.
* If appropriate, describe how this project will be integrated with other projects or ongoing work processes.
* Provide a reference to the official statement of project requirements (e.g.: in the business case or the project charter).

## Assumptions, Constraints, and Risks

Describe assumptions and any constraints on which the project is based. Include system dependencies that will affect this project.

* Describe the assumptions on which the project is based.
* Describe the imposed constraints and risks on the project such as:
* Schedule;
* Budget;
* Resources;
* Quality;
* Software to be reused;
* Existing software to be incorporated;
* Technology to be used; and
* External interfaces.

## Project Deliverables

List the deliverables or services to be provided by this project, or provide a reference to where such a list can be found. Include delivery dates, delivery locations, and quantities, as appropriate. It may be useful to portray these in a table.

* Identify and list the following, as required to satisfy the terms of the project charter or contract:
* Project deliverables (either directly in this Plan, or by reference to an external document);
* Delivery dates;
* Delivery location; and
* Quantities required.
* Specify the delivery media.
* Specify any special instructions for packaging and handling.

## Schedule and Budget Summary

Provide a summary of the schedule and budget, at the top level of the project work breakdown structure (or equivalent). Include all aspects of the project, including support functions, quality assurance, configuration management, and subcontracted work when treating the schedule and budget.

* Provide a summary of the schedule and budget for the IT project.
* Restrict the level of detail to an itemization of the major work activities and supporting processes (e.g., give only the top level of the work breakdown structure).

## Evolution of the Plan

Describe how this plan will be completed, disseminated, and put under change control. Describe how both scheduled and unscheduled updates will be handled.

* Identify the compliance of this Plan to any standards.

For example: The structure of this Project Plan is in compliance with the recommendations of IEEE Standard 1058‑1998.

* Specify the plans for producing both scheduled and unscheduled updates to this Plan.
* Specify how the updates to this Plan shall be disseminated.
* Specify how the initial version of this Plan shall be placed under configuration management.
* Specify how changes to this Plan shall be controlled after its issue.

## References

Provide a list of all documents and other sources of information referenced in the plan.

* Identify each referenced document by title, report number, date, author, and publishing organization.
* Identify other referenced sources of information, such as electronic files, using unique identifiers such as path/name, date and version number.
* Include a reference for the authorizing document for this project, the Statement of Work or Marketing Requirements or Charter or whatever that might be for the organization.
* Identify and justify any deviations from the referenced standards or policies.

## Definitions and Acronyms

Define, or provide references to documents or annexes containing the definition of all terms and acronyms required to properly understand this Plan.

# PROJECT ORGANIZATION

Describe the overall organization for the project including internal and external structures, roles, and responsibilities.

## EXTERNAL INTERFACES

Describe the administrative and managerial interfaces between the project and the primary entities with which it interacts.

* Describe the organizational boundaries between the project and external entities.
* Identify, as applicable:
* The parent organization;
* The customer;
* Subcontracted organizations; and
* Other organizational entities that interact with the project.
* Use organizational charts or diagrams to depict the project's external interfaces.

## Internal Structure

Describe the internal management structure of the project, as well as how the project relates to the rest of the organization. Include employees and contract staffs that are managed as part of this project.

* Describe the interfaces among the units of the IT development team.
* Describe the interfaces between the project and organizational entities that provide supporting processes, such as configuration management, quality assurance, and verification and validation.
* Use organizational charts or diagrams to depict the lines of authority, responsibility and communication within the project.

## Roles and Responsibilities

Identify and state responsibilities assigned to each major role in the project, and identify the individuals who are responsible for those functions and activities.

* Identify and state the nature of each major work activity and supporting process.
* Identify the organizational units that are responsible for those processes and activities.
* Consider using a matrix of work activities and supporting processes vs. organizational units to depict project roles and responsibilities.

# Managerial Process Plans

This section of the IT Project Management Plan specifies the project management processes for the project. It includes the plans for project start‑up, risk management, project work, project tracking, and project close‑out.

NOTE: This section may evolve over the lifetime of the project, and only a subset of them may be relevant; use elements accordingly. If there are documented processes that the project team is following, the plan may refer to the documented processes rather than reproduce them as part of this plan.

## Start‑up Plan

Describe the effort required to begin the project. Provide estimates for staffing, resources, schedules, and training.

### Estimates

Describe how the project effort, cost, and schedule will be estimated, including methods, tools, and techniques.

* Specify the estimated cost, schedule, and resource requirements for conducting the project, and specify the associated confidence levels for each estimate.
* Specify the methods, tools, and techniques used to estimate project cost, schedule and resource requirements;
* Specify the sources of estimate data and the basis of the estimation such as: analogy, rule of thumb, standard unit of size, cost model, historical database, etc.
* Specify the schedule for re‑estimation, which might be regular, a periodic or event‑driven (e.g., on project milestones).

### Staffing

Describe how staffing will be done, along with the expected level of staffing by phase of the project, types of skills needed, and sources of staff (may be employees or contract personnel). Describe how the staff will be organized and supervised here, or include it in the section that describes the project internal structure.

* Specify the number of required staff, providing the following details:
* Number of personnel by skill level;
* Numbers and skill levels in each project phase; and
* Duration of personnel requirement.
* Specify the sources of staff personnel (e.g.: internal transfer, new hire, contracted, etc.)
* Consider using resource Gantt charts, resource histograms, spreadsheets and tables to depict the staffing plan by skill level, by project phase, and by aggregations of skill levels and project phases.

### Resource Acquisition

Identify (or refer to a location that contains a description of) the resources associated with each of the major work activities, as well as an overall summary of the resource loading for the project and how they will be acquired.

* Specify the plan for acquiring the resources and assets, in addition to personnel, needed to successfully complete the project.
* Describe the resource acquisition process.
* Specify the assignment of responsibility for all aspects of resource acquisition.
* Specify acquisition plans for equipment, computer hardware and software, training, service contracts, transportation, facilities, and administrative and janitorial services.
* Specify when in the project schedule the various acquisition activities will be required.
* Specify any constraints on acquiring the necessary resources.
* If necessary, expand this subsection to lower levels, to accommodate acquisition plans for various types of resources.

### Project Staff Training

* Specify the training needed to ensure that necessary skill levels in sufficient numbers are available to successfully conduct the IT project.
* Specify the following training information:
* The types of training to be provided;
* Numbers of personnel to be trained;
* Entry and exit criteria for training; and
* The training method (e.g., lectures, consultations, mentoring, computer‑assisted training, etc.).
* Identify training as needed in technical, managerial, and supporting activity skills.

## Work Plan

Specify (or refer to a location that contains a list of) the work activities and their relationships, depicted in a work breakdown structure. Decompose the structure to a low enough level to facilitate sound estimating, tracking, and risk management. Work packages may be built for some or each of the elements of the work breakdown structure, detailing the approach, needed resources, duration, work products, acceptance criteria, predecessors, and successors.

### Work Breakdown Structure

* Define a Work Breakdown Structure (WBS) to specify the various work activities to be performed in the IT project, and to depict the relationships among these work activities.
* Decompose the work activities to a level that exposes all project risk factors, and that allows accurate estimation of resource requirements and schedule duration for each work activity.
* Specify the following factors for each work activity:
* Necessary resources;
* Estimated duration;
* Products or deliverables of the activity;
* Acceptance criteria for the work activity products; and
* Predecessor and successor work activities.
* The level of decomposition internally within the WBS may vary depending on the quality of the requirements, familiarity of the work, applicable level of technology, etc.

### Schedule Allocation

Specify (or refer to a location that contains) the schedule for the project, showing sequencing and relationships between activities, milestones, and any special constraints.

* Specify the scheduling relationships among the project work activities in a manner that depicts the time‑sequencing constraints and illustrates opportunities for concurrent work activities.
* Identify the critical path in the schedule.
* Indicate any constraints on the scheduling of particular work activities, that are caused by external factors.
* Identify appropriate schedule milestones to assess the scope and quality of project work products and of project achievement status.
* Techniques for depicting schedule relationships may include milestone charts, activity lists, activity Gantt charts, activity networks, critical path networks and PERT charts.

### Resource Allocation

Identify (or refer to a location that contains a description of) the resources associated with each of the major work activities, as well as an overall summary of the resource loading for the project.

* Provide a detailed itemization of the resources allocated to each major work activity in the project WBS.
* Specify the numbers and required skill levels of personnel for each work activity.
* Specify, as appropriate, the allocation of the following resources:
* Personnel (by skill level);
* Computing resources;
* Software tools;
* Special testing and simulation facilities; and
* Administrative support.
* Use a separate line item for each type of resource for each work activity.

### Budget Allocation

Show (or refer to a location that contains a description of) the budget allocated to each of the major work activities. Use the organization’s standard cost categories such as personnel costs, travel, equipment, and administrative support.

* Provide a detailed breakdown of the necessary resource budgets for each of the major work activities in the WBS.
* Specify the estimated cost for activity personnel, and include as appropriate, the costs for the following items:
* Travel;
* Meetings;
* Computing resources;
* Software tools;
* Special testing and simulation facilities; and
* Administrative support.
* Use a separate line item for each type of resource in each activity budget.

## Project Tracking Plan

### Requirements Management

Describe the process to be used for measuring, reporting, and controlling changes to the product requirements. Describe the techniques to be used for configuration management of the requirements, requirements traceability, impact analysis for proposed changes, and approving changes (such as a Change Control Board).

* Specify the process for measuring, reporting, and controlling changes to the project requirements.
* Specify the processes to be used in assessing the impact of requirements changes on product scope and quality, and the impacts of requirements changes on project schedule, budget, resources and risk factors.
* In the configuration management processes, specify change control procedures and the formation and use of a change control board.
* In the processes for requirements management, include traceability, prototyping and modeling, impact analysis, and reviews.

### Schedule Control

Describe how progress will be monitored and controlled. Address how the schedule will be controlled (milestones, progress to plan on activities, corrective action upon serious deviation from the plan), when reporting will be done for both the project team and management, and what tools and methods will be used.

* Specify the schedule control activities by identifying the processes to be used for the following purposes:
* To measure the progress of work completed at the major and minor project milestones;
* To compare actual progress to planned progress; and
* To implement corrective action when actual progress does not conform to planned progress.
* Specify the methods and tools that will be used to measure and control schedule progress.
* Identify the objective criteria that will be used to measure the scope and quality of work completed at each milestone, and hence to assess the achievement of each schedule milestone.

### Budget Control

Describe how performance to budget will be monitored and controlled. Address how the actual cost will be tracked to the budgeted cost, how corrective actions will be implemented, at what intervals cost reporting will be done for both the project team and management, and what tools and techniques will be used. Include all costs of the project, including contract labor and support functions.

* Specify the budget control activities by identifying the processes to be used for the following purposes:
* To measure the cost of work completed;
* To compare the actual cost to the planned and budgeted costs; and
* To implement corrective action when the actual cost does not conform to the budgeted cost.
* Specify when cost reporting will be done in the project schedule.
* Specify the methods and tools that will be used to track the project cost.
* Identify the schedule milestones and objective indicators that will be used to assess the scope and quality of the work completed at those milestones.
* Specify the use of a mechanism such as earned value tracking to report the budget and schedule plan, schedule progress, and the cost of work completed.

### Quality Control

Describe the mechanisms that will be used to maintain quality control. [These may be described in detail in other plans or in the Supporting Process Plans of this document.]

* Specify the processes to be used to measure and control the quality of the work and the resulting work products.
* Specify the use of quality control processes such as quality assurance of conformance to work processes, verification and validation, joint reviews, audits, and process assessment.

### Reporting

Describe how the progress of the project and other information needed by the project will be communicated to everyone associated with the project.

* Specify the reporting mechanisms, report formats and information flows to be used in communicating the status of requirements, schedule, budget, quality, and other desired or required status metrics within the project and to entities external to the project.
* Specify the methods, tools, and techniques of communication.
* Specify a frequency and detail of communications related to project management and metrics measurement that is consistent with the project scope, criticality, risk, and visibility.

### Project Metrics

* Specify the methods, tools, and techniques to be used in collecting and retaining project metrics.
* Specify the following metrics process information:
* Identification of the metrics to be collected;
* Frequency of collection; and
* Processes for validating, analyzing, and reporting the metrics.

## Risk Management Plan

Describe the process that will be used to identify, analyze, build mitigation and contingency plans, and manage the risks associated with the project. Describe mechanisms for tracking the specific risks, the mitigation plans, and any contingency plans.

Risk factors that should be considered when identifying the specific project risks include contractual risks, organization-related risks, technological risks, risks due to size and complexity of the product, risks in personnel acquisition and retention, risks in achieving customer acceptance of the product, and others specific to the context of the project.

* Specify the risk management plan for identifying, analyzing, and prioritizing project risk factors.
* Specify plans for assessing initial risk factors and for the ongoing identification, assessment, and mitigation of risk factors throughout the life cycle of the project.
* Describe the following:
* Procedures for contingency planning;
* Procedures for tracking the various risk factors;
* Procedures for evaluating changes in the levels of the risk factors and responding to changes in the levels of the risk factors;
* Risk management work activities;
* Procedures and schedules for performing risk management work activities;
* Risk documentation and reporting requirements;
* Organizations and personnel responsible for performing specific risk management activities; and
* Procedures for communicating risks and risk status among the various customer, project and subcontractor organizations.
* Identify and describe the applicable impact of any of the following risk factors:
* Risks in the customer‑project relationship;
* Contractual risks;
* Technological risks;
* Risks caused by the size and complexity of the product;
* Risks in the development and target environments;
* Risks in personnel acquisition, skill levels, and retention;
* Risks to schedule and budget; and
* Risks in achieving customer acceptance of the deliverables.

## Project Closeout Plan

Describe the plan for closing out this project. Identify the plans necessary to ensure orderly closeout of the IT project. Specify the following:

* A staff reassignment plan;
* A process for archiving project materials;
* A process for capturing project metrics in the business projects database;
* A process for post‑mortem debriefings of project personnel;
* A plan for preparation of a final report to include lessons learned and an analysis of project objectives achieved;
* An examination of the initial cost/benefit analysis to see if objectives have been met; and
* Examine any performance measures intended to be impacted by the project.

# Technical Process Plans

Describe the processes and approaches to be used for developing the work products or services for the project. The primary technical focus of the project may be one or more of the following:

* Acquisition – obtaining a system, product or service.
* Supply – providing a system, product, or service.
* Development – constructing a system or product.
* Operation – running a system or service for regular use.
* Maintenance – correcting, perfecting, or adapting a system.

## Process Model

Specify the life cycle model to be used for this project or refer to an organizational standard model that will be followed. If the project is tailoring an organization’s standard life-cycle model, that tailoring should be described here.

* Define the relationships among major project work activities and supporting processes.
* Describe the flow of information and work products among activities and functions.
* Specify the timing of work products to be generated.
* Identify the reviews to be conducted.
* Specify the major milestones to be achieved.
* Define the baselines to be established.
* Identify the project deliverable to be completed.
* Specify the required approvals within the duration of the project.
* In the process model for the project, include project initiation and project termination activities.
* Use a combination of graphical and textual notations to describe the project process model.

## Methods, Tools, and Techniques

Identify the methods to be used to develop the work products or services for the project.

* Specify the development methodologies, programming languages and other notations, and the processes, tools and techniques to be used to specify, design, build, test, integrate, document, deliver, modify and maintain the project deliverable and non‑deliverable work products.
* Specify the technical standards, policies, and procedures governing development and/or modification of the work products.

## Infrastructure

Specify the plan for establishing and maintaining the development environment (hardware, operating system, network and software), and the policies, procedures, standards, and facilities required to conduct the IT project. These resources may include workstations, local area networks, software tools for analysis, design implementations, testing, and project management, desks, office space, and provisions for physical security, administrative personnel, and janitorial services.

## Product Acceptance

Describe (or refer to a separate document that provides) the plan for acceptance of the project deliverables by the customer or acquirer of the product.

* Specify the plan for customer acceptance of the deliverables generated by the IT project and include the final approval process for product acceptance.
* Specify objective criteria for determining acceptability of the deliverables.
* Reference a formal agreement of the acceptance criteria signed by representatives of the IT organization and the customer.
* Specify any technical processes, methods, or tools required for deliverable acceptance, such as testing, demonstration, analysis, and inspection.
* Describe roles and responsibilities for reviewing the plan, generating the acceptance tests, running the tests, and reviewing results.

## Deployment Plan

Describe (or refer to a separate document that provides) the plan for releasing and installing the project deliverables or deploying them to the acquirer or customer site. The plan may need to include hardware installation, telecommunications, or database infrastructure preparation, and other information, as well as describing the means of distributing the software.

* Describe (or refer to a separate document that provides) the plan for operating and maintaining the system after deployment.
* If this project develops a product that is packaged and shipped to customers for their installation, describe how the product will be prepared for release and shipment.

# Supporting Process Plans

Provide plans for the supporting processes here, or refer to the appropriate plans and where they can be found. In some cases, the organization’s standard processes can provide the majority of the information and need not be reproduced in a plan.

## Configuration Management

Specify or reference the configuration management plan for the IT project, providing the information identified in the following lines.

* Specify the methods that will be used to perform the following activities:
* Configuration identification;
* Configuration control;
* Status accounting;
* Evaluation; and
* Release management.
* Specify the processes of configuration management including procedures for the following activities:
* Initial base-lining of work products;
* Logging and analysis of change requests;
* Change control board procedures;
* Tracking of changes in progress; and
* Procedures for notification of concerned parties when baselines are established or changed.
* Identify the automated configuration management tools used to support the configuration management process.

## Verification and Validation

Specify or reference the verification and validation plan for the IT project, providing the information identified in the following lines.

* Specify the scope, tools, techniques, and responsibilities for the verification and validation work activities.
* Specify the organizational relationships and degrees of independence between development activities and verification and validation activities.
* Specify the use of verification techniques such as traceability, milestone reviews, progress reviews, peer reviews, prototyping, simulation, and modeling.
* Specify the use of validation techniques such as testing, demonstration, analysis, and inspection.
* Identify the automated tools to be used in verification and validation.

## Documentation

Describe (or refer to the description of) the processes, techniques, and tools that will be used for generating the deliverable and non-deliverable work products for the project. Include the product deliverables described earlier in this plan, as well as the various supporting plans and other documentation used by the project team to conduct the project.

* Specify the organizational entities responsible for providing input information, and for generating and reviewing the project documentation.
* Specify the following information or object identification:
* List of documents to be prepared;
* Controlling template or standard for each document;
* Who will prepare each document;
* Who will review each document;
* Due dates for review copies;
* Due dates for initial baseline versions; and
* A distribution list for review copies and baseline versions and quantities required.

Documents often found useful to perform the technical processes for developing software that satisfies the requirements include the following:

* User Requirements Specification – description of the problems to be solved, user needs to be served, in the words of the user.
* Software Requirements Specification – detailed technical descriptions of the product requirements, addressing functionality, quality attributes, interfaces, design constraints, and other information helpful to product design.
* Design Documentation – descriptions of major components of the product design, including architecture, process design, user interfaces, database design, and internal interface design.
* Test Documentation – test plans, test procedures, and test cases at all relevant levels of testing (unit, module, integration, system, acceptance, alpha, beta).

## Quality Assurance

Specify or reference the quality assurance plan for the IT project, containing the information identified in the following lines.

* Specify the plans for assuring that the IT project fulfills its commitments to the IT process and the IT product as specified in the requirements specification, the IT Project Management Plan, supporting plans and any standards, procedures, or guidelines to which the process or the product must adhere.
* As applicable, specify the quality assurance procedures to be used, such as analysis, inspection, review, audit, and assessment.
* Indicate the relationship among the quality assurance, verification and validation, review, audit, configuration management, system engineering, and assessment processes.

## Reviews and Audits

Describe the manner and methods used for all project reviews and audits.

* Specify the schedule, resources, processes, and procedures used in conducting project reviews and audits.
* Specify the plans for joint customer‑project reviews, management progress reviews, developer peer reviews, quality assurance audits, and customer‑conducted reviews and audits.
* List the external agencies that approve or regulate any project deliverable.

## Problem Resolution

Describe the resources, methods, and tools to be used for reporting, analyzing, prioritizing, and handling project issues. Issues may include problems with staffing or managing the project, new risks that are detected, missing information, defects in work products, and other problems. Describe how the issues will be tracked and managed to closure.

* Indicate the roles of development, configuration management, the change control board, and verification and validation in problem resolution work activities.
* Provide for separate tracking of effort expended on problem reporting, analysis and resolution, so that rework can be tracked and process improvement accomplished.

Note: Work product defects in baselined work products should be handled by the configuration management change control process.

## Subcontractor Management

Specify or reference the plans for selecting and managing any subcontractors that may participate in or contribute to the IT project.

* Specify the criteria for selecting subcontractors.
* Generate a separate management plan for each subcontract, using a tailored version of this Project Plan, and include all items necessary to ensure successful completion of each subcontract as follows:
* Requirements management;
* Monitoring of technical progress;
* Schedule and budget control;
* Product acceptance criteria;
* Risk management procedures;
* Additional topics as needed to ensure successful completion of the subcontract; and
* A reference to the official subcontract and subcontractor/prime contractor points of contact.

## Process Improvement

Specify the plans for periodically assessing the project, for determining areas for improvement, and for implementing the improvement plans. If this project carries a responsibility for defining, testing, or using some new organization process, describe how that is incorporated into the project’s work. If this project is responsible for showing the impact to the business of using some new process, describe how that is included in the project’s measurement plan.

* Ensure that the process improvement plan is closely related to the problem resolution plan.
* Include in the improvement plan a process to identify the project processes that can be improved without serious disruption to an ongoing project, and to identify the project processes that can best be improved by process improvement initiatives at the organizational level.

# Additional Plans

Specify or reference any additional plans required to satisfy product requirements and contractual terms, which may include:

* Plans for assuring safety, privacy, and security requirements are met;
* Special facilities or equipment specification;
* Product installation plans;
* User training plans;
* Integration plans;
* Data conversion plans;
* System transition plans;
* Product support and maintenance plans; and
* Identify potential follow-up project plans which will use or supersede this project.