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| **Project Management Plan / Initiation Document** | | |  |
| **Document Purpose**  The Project Management Plan (PMP) / Initiation Document sets out how the project will be carried out and contains all of the detailed information required to deliver the project outcomes to time and budget. | | | |
| **Project Name:** | *Insert project name* | **Project / work package Number:** | *If applicable* |
| **Project Sponsor:** | *Insert name* | **Linked Document(s):** | *If applicable* (e.g. Project Brief, Business Case) |
| **Project Manager:** | *Insert name* | **Lifecycle Phase:** | *If applicable* (e.g. Definition) |

**\***

1. Project Description

**Summary & Background**

*A brief description of why you are doing the project, what changes/improvements need to be made and the current situation. Provide details of the strategic objectives that are pertinent to the project. i.e. how is this project going to contribute to:*

* *The achievement of your organisations objectives and improvement priorities*

**Deliverables / project outputs**

*What is the purpose of the project and what it will deliver?*

**Project outcomes**

*As a result of delivering the project, what will be the benefits, both financial and non-financial that ensue?*

**Performance, quality measures and user acceptance criteria**

*Identify the performance measures (KPI’s) that will be used to monitor the success of the project, together with the essential attributes that define user requirements*

**Project scope, assumptions and constraints**

*Clearly define what is within, and what is outside, the scope of the project (including any assumptions and constraints)*

**Linkages and dependencies**

*Outline whether the project contains links to other projects, events or initiatives that are planned or in progress. Include any known dependencies either within or between projects/work packages*

1. Project Finance & Business Case summary

*Provide a summary of the Business Case that justifies the project including the options that were considered, the assessment of the options and the details of the preferred option.*

**Financial - capital and revenue**

*Provide an updated summary of the project cost information included in the Business Case. Include the Business Case and Financial Spreadsheet as an appendix.*

* *Include a summary table below*
* *Set out known financial constraints and assumptions (including spend end date)*

**Non-financial (for example)**

* *Work that will not be done while the project is in progress*
* *Temporary deterioration of services while changes take place*
* *Consequences of success (e.g. increased demand)*

1. Accountabilities, Roles and Decision Making

**Project Board**

*Identify the Board members and the time commitments needed for them to effectively fulfil their role. Ensure that roles have been allocated to, and agreed by, Board members.*

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| --- | --- | --- |
| Role | Name | Time allocation (e.g. / week) |
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**Decision-making and Reporting**

*Identify to whom the Sponsor and Project Manager will report the progress and outcomes of the project to, along with the frequency of this reporting.*

* *What will be reported*
* *How this will take place e.g. progress report, exception report, verbal update*
* *Who is responsible for reporting*
* *Who are they reporting to*
* *When and how often this will happen*

**Project Team**

*Identify the Project Manager, team members, their responsibilities, and their time commitment and ensure that the roles have been allocated to, and agreed by, Board members*

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| --- | --- | --- |
| Project Manager: XXX | | |
| **Team member name(s)** | **Role / responsibility** | **Time allocation (e.g. / week)** |
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**Project Assurance**

*Set out the approach to project assurance that will be applied throughout the project. Specify any assurance reviews that are required (mandatory for Tier 3 projects).*

**End-of-Phase reviews**

It is mandatory for phase reviews to be completed at the end of each stage of the project lifecycle to provide an opportunity to control a project and authorise progression to the next phase based on defined acceptance criteria. Phase reviews must be defined as part of the Project Brief (e.g. following initial data gathering and analysis).

1. Stakeholder Management & Communication

* *Identify the people and/or groups who have an interest in, need to be consulted on or involved in the project, both internally and externally and how frequently*
* *Which internal policies, processes or statutory requirements need to be followed?*
* *Set out the reasons, benefits and implications for key stakeholders of undertaking the project. These will form the basis of the communications message.*
* *Consider whether a separate Stakeholder Analysis & Comms Plan should be developed and include as an appendix (depending on the level of complexity - Tier 2 & 3)*

1. Key meetings

*Identify what meetings will take place, how often, and who will be required to attend*

|  |  |  |
| --- | --- | --- |
| ***Meeting*** | ***Frequency*** | ***Attended by*** |
| XXX | XXX | XXX |

1. Project schedule / plan

*Summarise key milestones below and attach a full project schedule / plan*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project Start date: | | XXX | Project End date: | XXX |
| ***Baseline Milestones*** | | | | |
| *Identify the key points during the project and the target dates when they will be reached* | | | | |
| **Milestone 1** | XXX | | | Due Date |
| **Milestone 2** | XXX | | | Due Date |
|  |  | | |  |
|  |  | | |  |

*For large projects, where product based planning has been used, include product breakdown structure (or Work Breakdown structure) and product flow diagram as an appendix.*

1. Procurement

*Describe the approach to procurement or commissioning*

1. Tolerances

*Provide details of any specific tolerances (e.g. time bound or cost-based) and the level of approval needed should a change be required. For example, ‘an overall tolerance of x weeks on approved schedule for stage 1 of the project will be allowed’ or ‘Plus or minus x% of the total budget will be allowed. If these tolerances are breached, an exception report will be raised with the Project Board.’*

1. Risks & Issues

*Summarise key risks and issues below and include the full Risk & Issue Management Plan as an appendix*

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| --- | --- | --- | --- | --- |
| **Risk** | **Impact / Probability**  **(H / M / L)** | **Rating**  (**R / A / G**) | **Mitigating action** | **Owner** |
| XXX | XXX | XXX | XXX | XXX |
| XXX | XXX | XXX | XXX | XXX |

1. Benefits Realisation

*How will the intended benefits be realised? What will be done to make the change ‘business as usual’? Who are the owners and actioners? What is the anticipated timescale for implementation? Include the full benefits realisation management plan as an appendix.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Benefit** | **Action** | **Timescale** | **Owner** |
| XXX | XXX | XXX | XXX |
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| **Control & Approval** | | | |
| **Author:** |  | **Approver / Title:** |  |
| **Document Version no:** |  | **Approval Date:** |  |