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Montclair State University – Proprietary

Use Pursuant to Organization Instructions

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< Blue Text within angle brackets “< - >” in this template is guidance information and blue text without brackets is example data. All blue text must be replaced and turned to black text or removed when creating the final document. >

# DEFINITIONS

Standard acronyms and definitions are contained in OM-STD-003 *Standard Definitions and Acronyms*. Significant definitions required by this document are listed in the table below.

| **Term** | **Definition** |
| --- | --- |
|  |  |
|  |  |
|  |  |

# PROJECT OVERVIEW

< Information in this section should be copied directly from the *Business Case - Charter* if such a document was produced for this project. >

< Enter a paragraph briefly describing the purpose of this project. >

## Project Objectives

< Describe the objectives for this project – when these objectives are achieved, the project is complete >

## Project Scope

< This section should define at a high level, the intended scope for this project. This would include impacted systems and departments. >

## Sponsor, Customers, Stakeholders

**Sponsor:**

< Identify the Sponsor or sponsoring organization for this project. >

**Customers:**

< Identify the user groups that will benefit from this project. >

**Stakeholders:**

< Identify key stakeholders – people who need to be informed or will contribute to the project without being project team members. >

## Benefits

< Describe the expected benefits from completing this project >

## Key Requirements

< List key requirements that must be met by the objectives above >

## Major Deliverables

< List the key deliverable products, services, or functionality that are a result of this project. >

## Work Breakdown

< List here the major areas of work required for this project. Costs and status are to be tracked against this work breakdown. Schedules will reflect these major areas. >

## Project Duration and Milestone Dates

< Enter a bullet list of significant milestone dates. As a minimum enter expected project start and end. >

* Project Planning Complete: < Date >
* < Milestone > < Date >
* Project Complete: < Date >

## Vendor Management

< Explain here how vendors, contractors, business partners will be used on this project. Describe how they will be selected and managed on the project. Break out estimated vendor costs in the Cost Breakdown table below. Reference the Procurement Plan section below as necessary. >

## Cost Breakdown

< List major cost items to be budgeted and tracked. These will be compared against the Benefits listed above to justify the project. >

| **Cost Item** | **Vendor** | **When Needed / Phase** | **Estimated Cost** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Constraints

< List any identified constraints that are part of this project. >

## Assumptions

< List any assumptions upon which this plan is based. >

# PROJECT ORGANIZATION

< Describe the project team and major roles and responsibilities >

| **Role** | **Name** | **Responsibilities** |
| --- | --- | --- |
| Project Manager |  |  |
|  |  |  |
|  |  |  |

< Further description of team - consider pasting in an organization chart >

# ADMINISTRATIVE APPROACH

## Communication Plan

< Describe regular meetings, status reports, types of communication for key stakeholders, reports, and other methods of communication. >

### Meetings

| **Meeting** | **Duration** | **Chair** | **Required Attendees (by Role)** |
| --- | --- | --- | --- |
| Team Weekly Meeting | 1 hour | Project Manager |  |
| PMO Project Review | 1 hour | PMO Coordinator |  |
|  |  |  |  |

### Status Reports

* Project Scorecard – Monthly – to the PMO Coordinator
* < List >

### Other Communications

## Stakeholder Management

< Describe key project stakeholders – those people that are not part of the project team but on whom successful completion of the project depends – identify by name, title, or role and, for each, identify how they contribute to the project. >

| **Role** | **Name** | **Responsibilities / Interactions / Meetings** |
| --- | --- | --- |
| Sponsor |  |  |
|  |  |  |
|  |  |  |

## Risk Management

< Describe the approach for risk management. How often are risks reviewed? Who is responsible for managing risks and ensuring risk mitigation or contingency plan are established? How are risks documented and managed to closure. When are risks escalated to the PMO or other stakeholders? >

## Issue and Action Item Management and Escalation

< Describe the approach for issue and action-item management. How often are they reviewed? Who is responsible for documenting issues and action items? How are they managed to closure? When are issues escalated to the PMO or other stakeholders? >

## Project Measurement and Status Reporting

< Describe the project measures and Key Performance Indicators (KPIs) that will be tracked and reported. Identify who is responsible for collecting and reporting project metrics and status reports and to whom they are reported. >

The project will use the standard Project Scorecard Template: OM-Template – *Project Scorecard* – to report project status monthly. The project will maintain a Microsoft Project Schedule / Work Plan to track completion of activities, planned vs. actual dates for each activity, and personnel assignments to each activity. The Scorecard will be presented monthly in the PMO meetings and the schedule is available for review with the PMO or Executive Director when requested.

## Personnel Resource Management Plan

< Describe the personnel that will be required for this project providing Role and Count by project phase or timeline. For each Role, describe or point to documentation of skills and knowledge required to perform that role on this project.

Describe when personnel will be added and released on the project team.

Describe key personnel resources that are outside the project team (e.g., Testers, Subject Matter Experts). Describe the role and provide estimated numbers by project phase or timeline.

Describe methods by which personnel will be added to the project (e.g., direct hire, vendor contract, borrowed from another group) >

## Skills and Knowledge Transfer

### Project Team and Stakeholder Training

< Describe the methods and events for ensuring that project team members, key stakeholders, and other parties associated with this project have sufficient knowledge and skills to perform their work and receive project-specific skills and knowledge as it is developed during the life of the project. >

### User Documentation, Support Documentation, Training

< Describe the methods and deliverables to convey required knowledge and data from the project team to Montclair State University personnel and support teams. Specifically describe any User / Customer training to be provided and any Help Desk or support documentation to be provided as part of this project. >

# TECHNICAL APPROACH

## Life Cycle Phases, Activities and Milestone Dates

< Using the Work Breakdown Structure as a basis, identify key milestone dates for phases of the project. Describe here the phases with the major deliverables for each phase that will mark its completion. >

| **Phase - Activity** | **Start – End Dates** | **Major activities and deliverables** |
| --- | --- | --- |
| Initiation | 01-Nov-2013 – 31-Dec-2013 | Business Case - Charter approvedInitial budget for planning approved |
| Planning - Vendor Selection(Only if required) | Jan-2014 – Feb-2014 | Contractor(s) selected using criteria and due diligenceVendor SOWs approvedContracts established |
| Planning – Project Planning |  | Project Management Plan initiatedProcurement Plan and vendor Statements of Work (SOWs) approvedTechnical Architecture Document initiatedWBS & Schedule / Work Plan initiatedResource Plan approvedPreliminary Budget approvedRisk Log initiated |
| Planning - Analysis |  | Detailed Requirements acquired and approved Detailed Project Management Plan approvedDetailed WBS & Schedule / Work Plan approvedResource Plan approvedBudget updated and approved |
| Planning - Design |  | Technical Architecture Document updatedInterface Control Document and Data Dictionary initiated“To-Be” Process Flows and Work Process Descriptions approvedTest Environment Documents approvedUser documentation and Training Plan approved |
| Execution – Develop, Test, Deploy - Release 1 |  | Release Functional Description approvedChange Log Records approvedVersion Description Document approvedTest Records and Acceptance Criteria approvedSupport and Help Documentation approvedUser Documentation and Training Documents |
| Execution – Develop, Test, Deploy - Release 2 |  | Release Functional Description approvedChange Log Records approvedVersion Description Document approvedTest Records and Acceptance Criteria approvedSupport and Help Documentation approvedUser Documentation and Training Documents |
| Closeout |  | Shutdown Plan approvedVendor Contracts closed or transferredProject Documents and Records archivedLessons Learned and Opportunities documented and submitted to the PMOProject Funding is closed |

## Processes, Methods, and Tools

< Identify here specific tools and methods to be used by the project. Identify specific templates, procedures, guides, etc. from the OneMontclair Process Documentation Library (PDL) that the project team will use as well as any applications or tools from other sources. >

| **Tool, Template, or Method** | **When Applied or Used** | **Description / Purpose / Source** |
| --- | --- | --- |
| Daptiv | Planning and throughout the life of the project | This tool is used to manage project resources and report status |
| As-is / To-Be Workflow Diagrams | Business Requirements Gathering and Solution Design | These diagrams will be used to understand the current business processes, gain concurrence from the customer and users, and to design new versions of the work processes that will be implemented in the new application |
| OM-Template – Project Scorecard | Monthly throughout the project life | The Project Scorecard is used monthly to report project status, achievements, issues, and other details to the PMO |
| MS Project Schedule | Maintained current throughout the project life | Used to track planned and actual completion of project tasks organized along the project’s Work Breakdown Structure. Evaluation of the schedule leads to early indicators of potential problems with availability of resources and potential schedule slippage. |

## Development and Testing Environment

< Describe the development and testing environment required to support this project and its deliverable systems or baselines. This section may refer to the *Technical Architecture Document* for more detail. Describe the methods for advancing work processes / applications / baselines from development through testing into operations. Describe the tests that will occur, who performs them, and who approves advancement to the next level. >

## Required Off-the-shelf Hardware and Software

< List here hardware and software that has to be migrated, purchased, installed, and / or configured as part of this project. If the project requires no new hardware or software then so state. If hardware or software is released from service as a result of this project, then list them here as well. This section may refer to the *Technical Architecture Document* for more detail.

If appropriate, provide a timeline describing when hardware or software changes will take place. >

## Requirements Management Plan

< Describe the methods, documents, and tools to be used to collect, record, manage, and trace project requirements from initial business and program requirements through customer requirements, into testing. Describe the requirements documents that will be maintained, who approves them, and how changes to approved requirements will be reviewed and approved. >

## Peer Review, Testing, Verification, Validation Plan

< Describe how work products (documents, code, screens, databases, etc.) will be reviewed or tested against requirements (e.g., peer review, testing, prototypes, demonstration, acceptance testing) throughout the project lifecycle. Verification involves reviewing or testing documents, applications, processes, against their requirements. Validation involves ensuring that work products continue to meet their intended use with customers or users. >

## Technical Documentation

< Describe the design methods to be used and resulting technical documentation types that will be written when transforming requirements into applications. Identify which technical documents will be approved and by whom. Include baseline descriptions, version description documents, screen layouts, etc. >

## Customer Support Products

< Describe the customer support products such as training materials, work aids, instruction manuals, installation manuals, help files, etc. that will be produced as part of this project. Describe how they will be delivered and who approves them. Include documents to be turned over to the service desk for continued maintenance of the deliverable products. >

## Deployment, Installation, and Support Approach

< If not covered above, describe in detail the approach for installing and deploying the deliverable system or applications. Refer to the *Technical Architecture Document* if appropriate. >

# PROCUREMENT PLAN

< This section may be ‘not applicable’ (enter “N/A” here) or you may enter a reference to a Procurement Plan external to the Project Management Plan. For each vendor working on this project, copy and paste the following sections under a third-level heading with the vendor’s name. Numbered items below may be listed as “TBD” in the initial Project management plan to be filled in at a later phase. >

### < Vendor Name {or description if vendor not chosen yet} >

1. **Objective** - < What will this vendor do? >
2. **Period of Performance** - < Indicate during which project phases vendor will be active or provide date estimates >
3. **Contract Vehicle** - < What contract, SOW, or other controlling documents will be used >
4. **Contract Manager** - < MSU person responsible for managing the contract – typically from Procurement >
5. **Technical Contract Manager** – < Name a person or role on this project who will be the technical point of contact with the vendor >
6. **Management Reviews** - < Explain meetings, reviews, status reports that will be used to monitor vendor work activities against schedule and plan >
7. **Technical Interchange Meetings** - < Explain meetings, documents, etc. that will be used to communicate technical aspects and requirements for this project >
8. **Deliverables** - < List deliverables from this vendor and acceptance method / criteria that will be used for each >
	1. **Deliverable Name** – Format, delivery method, acceptance criteria
	2. **Deliverable Name** – Format, delivery method, acceptance criteria
9. **Requirements Management Approach** - < Describe how requirements and changes to requirements for the vendor’s work will be communicated, reviewed, and approved >
10. **Contract Completion Criteria** - < How will successful vendor work completion be determined and by whom >
11. **Additional Notes** - < More information >

# QUALITY ASSURANCE APPROACH

## Process Documentation

< Describe where and how project process-related documentation (policies, procedures, templates specific to the project) will be written, managed, and controlled. If appropriate, refer to the use of the standard OneMontclair Process Documentation Library (PDL) where standard project process-related documentation is stored. >

## Process Reviews and Audits

< Describe how the project manager will ensure that team members are properly using the processes, methods, and tools described in the sections above on this project. >

During project team meetings and phase kickoff meetings, the Project Manager reviews current policies, methods, tools, and templates in use during the current project phase with the project team. During team meetings, any issues related to processes, tools, and templates are discussed and appropriate action taken by the team.

Periodically, the Project Manager may ask the OneMontclair Program Quality Manager to review the effective use of processes, tools, and methods for the purpose of improving efficiency and team effectiveness.

## Approach for Regulatory Compliance

< Describe the appropriate regulatory requirements that affect this project. Describe steps the project will take to ensure compliance of the solution with appropriate regulations. Describe how the project will ensure that records and documents that may be needed for regulatory audits will be created and stored. List audit personnel or groups who are stakeholders for this project and how they will be informed of important compliance issues. Describe any audits or reviews involving regulatory compliance that must be conducted during the development and deployment phases of the project. >

## Identification and Escalation of Quality and Process Issues

< Describe how any issues affecting the quality of the project deliverables or overall quality of the OneMontclair program will be identified, analyzed, and escalated to the PMO. Describe when such escalation will be necessary. >

# DOCUMENT CONTROL

## Document Version

| **Version** | **Date** | **Author** | **Change** |
| --- | --- | --- | --- |
| 1.0 | 01-Nov-2013 |  |  |
|  |  |  |  |

## Document Approval

This plan is approved by the persons named below. Signatures are on file.

| **Title** | **Name** | **Approval Date** |
| --- | --- | --- |
| Executive Director |  | 01-Nov-2013 |
|  |  |  |
|  |  |  |

## Document Change Control

This document is under the control of the Project Manager. Change requests or updates are submitted to the Project Manager for consideration. The approvers listed above will consider and approve document revisions.

## References

< Enter all and only documents that are actually referenced in the text of this document >

* OM-STD-003 – *Standard Definitions and Acronyms*
* OM-Template – *Project Scorecard*
* < Doc ID > - Document Name