APPENDIX

***APPENDIX A: GLOSSARY***

***APPENDIX B: FORMS***

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| *PM - 01* | *Project Statement* |
| *PM - 02 - 0* | *Project Management Plan: Project Approval* |
| *PM - 02 - 1* | *Project Management Plan: Project Summary* |
| *PM - 02 - 2* | *Project Management Plan: Project Charter* |
| *PM - 02 - 3* | *Project Management Plan: Project Tradeoff Matrix & Status Summary* |
| *PM - 02 - 5* | *Project Management Plan: Activity List (Work Breakdown Structure)* |
| *PM - 02 - 6* | *Project Management Plan: Work Product Identification* |
| *PM - 02 - 8* | *Project Management Plan: Estimated Cost At Completion* |
| *PM - 02 -10* | *Project Management Plan: Project Requirements* |
| *PM - 02 – 11*  *PM - 02 - 11a* | *Project Management Plan: Risk Management Worksheet*  *Risk Identification Summary* |
| *PM - 02 - 12* | *Project Management Plan: Configuration Management Plan* |
| *PM - 02 - 13* | *Project Management Plan: Quality Plan* |
| *PM - 02 - 14* | *Project Management Plan: Top Five Issues* |
| *PM - 02 - 15* | *Project Management Plan: Issue Status* |
| *PM - 03* | *Project Estimate Summary Worksheet* |
| *PM - 04* | *Task Analysis Form* |
| *PM - 06* | *Project Start-Up Check List* |
| *PM - 07* | *Status Report* |
| *PM - 08* | *Activity Tracking Table* |
| *PM - 09* | *Change Management* |
| *PM - 10* | *Issue Resolution Form* |
| *PM - 11* | *PIER Template* |
| *PM - 12* | *IT Project Decision List* |

|  |  |
| --- | --- |
| ***Number*** | ***Name*** |
| PM - 01 | Project Statement |
| PM - 02 - 0 | Project Management Plan: Project Approval |
| PM - 02 - 1 | Project Management Plan: Project Summary |
| PM - 02 - 2 | Project Management Plan: Project Charter |
| PM - 02 - 3 | Project Management Plan: Project Tradeoff Matrix & Status Summary |
| PM - 02 - 5 | Project Management Plan: Activity List (Work Breakdown Structure) |
| PM - 02 - 6 | Project Management Plan: Work Product Identification |
| PM - 02 - 8 | Project Management Plan: Estimated Cost At Completion |
| PM - 02 -10 | Project Management Plan: Project Requirements |
| PM - 02 – 11  PM - 02 - 11a | Project Management Plan: Risk Management Worksheet  Risk Identification Summary |
| PM - 02 - 12 | Project Management Plan: Configuration Management Plan |
| PM - 02 - 13 | Project Management Plan: Quality Plan |
| PM - 02 - 14 | Project Management Plan: Top Five Issues |
| PM - 02 - 15 | Project Management Plan: Issue Status |
| PM - 03 | Project Estimate Summary Worksheet |
| PM - 04 | Task Analysis Form |
| PM - 06 | Project Start-Up Check List |
| PM - 07 | Status Report |
| PM - 08 | Activity Tracking Table |
| PM - 09 | Change Management |
| PM - 10 | Issue Resolution Form |
| PM - 11 | PIER Template |
| PM - 12 | IT Project Decision List |

A. General Information

**Information to be provided in this section is general in nature and quickly provides the necessary information pertaining to the organization of the project and project participants.**

|  |  |  |  |
| --- | --- | --- | --- |
| Project Name: |  | Date: |  |

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| --- | --- | --- | --- | --- |
| State organization: |  | Submitted By: | | |
| Please answer the following questions by marking “Yes” or “No” and providing a brief response as appropriate | | | Yes | No |
| Is this an updated Project Statement? Is so, reason for update: | | |  |  |
| Is concept development effort funded? If yes, how much\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |  |  |
| Is this a follow-on to a previous project? If “yes,” please provide:  Name of previous project: Date Completed: | | |  |  |

Points of Contact.

Please list the individuals who will be responsible for this project during its initial conceptual and planning stages, as appropriate. This will be the group of individuals that meets to review and discuss the project statement and sizing.

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **Name/Organization** | **Phone** | **E-mail** |
| Project Manager |  |  |  |
| Senior Management Sponsor |  |  |  |
| Senior Technical Sponsor |  |  |  |
| Procurement Contact |  |  |  |
| Customers: |  |  |  |
| Other Stakeholders (Top 3): |  |  |  |

B. Project Charter:

Business Problem.

*Provide a brief concise description of the business problem.*

Statement of Work (Goal).

*The statement should be short, precise and clear.*

Project Objectives:

Provide a brief, list of what the project is to accomplish. The project objectives are a detailed version of the statement of work. Taken with the statement of work, the objectives define the boundaries (scope) of the project. The objective statement can also be seen as a decomposition of the statement of work into a set of necessary and sufficient objective statement.

Objectives may include both short and long-term objectives.

C. Success Factors:

*List factors that will be used to determine the success of the project. This part of the project statement should answer the question, “How do we know it the project was successful?” It is essential that the criteria be quantifiable and measurable. Short-term success factors are used to determine if a project is complete.*

**Short Term**

**Long Term**

D. Strategic and Background Information:

|  |  |  |
| --- | --- | --- |
| *Please answer the following questions by marking “Yes” or “No.”* | Yes | No |
| Is the project consistent with the state organization Business Plan.? If not, why not? |  |  |
| Is the project identified in the state organization IT strategic plan? If not, why not? |  |  |
|  |  |  |

Business Area or IT Area Impacted. Check all appropriate functions.

| Project Management |  | Planning |  | Document Tracking |  | Program-specific Data Management system |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Human Resources |  | Procurement |  | Workflow Management |  | Help Desk |  |
| Financial |  | Year 2000 |  | Desk Top Productivity |  |  |  |

Other Business Functions:

Types of Technology. Identify technology areas that might apply to this project. Check all appropriate categories.

| SQL Database |  | Real Time |  | Expert System |  | LAN |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Client Server Architecture |  | Imaging |  | WAN/Internet |  | Desktop application |  |
| Main Frame Solution |  | Electronic Data Interface |  | C.A.D. |  | Other |  |

Other Technology Areas:

E. Planning Budget:

*A small amount of high-level planning information should be provided with this project statement if any sizable effort of business analysis needs to be completed. If not, this section may be omitted.*

*Provide a list of activities to complete the concept and planning phases. There should be approximately 2 to 10 tasks.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activity #** | **Activity Description** | **# of Days** | **Estimated Cost** | **Milestone** |
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|  | TOTAL |  |  |  |

*Attach a schedule for these tasks if available.*

*F. High Level Plan*

###### Use the following table to estimate the overall cost of the proposed project after the project plan is approved. Remember that these cost figures are to be general estimates. The detailed project plan will follow in the planning phase.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activity #** | **Activity Description** | **# of Days** | **Estimated Cost** | **Milestone** |
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|  | TOTAL |  |  |  |

G. Planning Financial and Schedule Information:

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| --- | --- | --- | --- |
| Estimated Budget | Low:  High: | Estimated Start Date:  (Qtr. and Yr.) |  |
| Estimated Length (Months) |  | Estimated Completion Date: (Qtr. and Yr.) |  |
| Fiscal Year 1 Dollars |  | Fiscal Year 2 Dollars |  |

H. Other related information:

I. Overall phases of work and expected timeframes:

1. ***Related assumptions:***

# ITEC PROJECT MANAGEMENT PLAN APPROVAL

**Project Name:**

**Date:**

**Release #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Project Manager:**

**Approvals:**

**Project Manager Prime Contractor Manager - (if applicable)**

**State Organization Management/ User Management**

**Steering Committee Chairman**

**Oversight Manager - (if applicable) Project Sponsor**

**CITO - (if applicable)**

The above signatures represent agreement with the attached plan including agreement with the activities, the risks, the effort and the cost of the associated project.

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| Project Name: |  | Start Date: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| State Organization:: |  | Submitted by: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Prime Contractor: |  | Date Awarded: |  |

|  |  |
| --- | --- |
| Current Stage of Project: | Development Life Cycle (Design, Development, Integration or Testing or Implementation) |

|  |  |  |  |
| --- | --- | --- | --- |
| Project is On Schedule: | Yes:  No:   Details: | Project is within Budget: | Yes:  No:   Comments: |

|  |  |  |
| --- | --- | --- |
| Please answer the following questions by marking “Yes” or “No” and provide a brief response as appropriate | Yes | No |
| Is this an updated Project Plan? If so, reason for Update: |  |  |
| Budget for project by fiscal year and is project funded? If so, for what amount(s) and period(s):  Budget Amount: Year: Funded?  Budget Amount: Year: Funded?  Budget Amount: Year: Funded?  Total Budget: |  |  |

Points of Contact

This should be the list of individuals that will be involved with the project during the execution phase.

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **Name/Organization** | **Phone** | **E-mail** |
| Project Manager |  |  |  |
| Senior Management Sponsor |  |  |  |
| Senior Technical Sponsor |  |  |  |
| Procurement Contact |  |  |  |
| Customers: |  |  |  |
| Other Stakeholders (Top 3): |  |  |  |

Prime Contractor Information

Company:

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **Name** | **Phone** | **E-mail** |
| Project Manager |  |  |  |
| Senior Technical Sponsor |  |  |  |
| Contracts Contact |  |  |  |

Business Problem.

Statement of Work (Goal).

Project Objectives:

Provide a brief, concise list of what the project is to accomplish.

1.

2.

3.

4.

5.

6.

Success Factors:

List factors that will be used to determine the success of the project.

Short-Term

1.

2.

3.

Long-Term

1.

2.

3.

Project Dependencies/Constraints:

|  |  |  |
| --- | --- | --- |
| **Schedule** | **Scope** | **Resources** |
|  |  |  |
| Identify variable to be CONSTRAINED, IMPROVED, ACCEPTED | | |

Comments:

**+/- Status**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Team** | **Tech** | **Schedule** | **Cost** | **Comment** |
|  | -/+ | -/+ | -/+ |  |
|  | -/+ | -/+ | -/+ |  |
|  | -/+ | -/+ | -/+ |  |
|  | -/+ | -/+ | -/+ |  |
|  | -/+ | -/+ | -/+ |  |

Discuss:

**Legend**

+ = Ahead of Schedule

- = Behind Schedule

/ = On Schedule

Provide an activity list (*work breakdown structure*) *that describes each task required by the project*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Activity # | Activity Name Description | Roles | Elapsed Days | Work Hours | Start Date | Dependency | Milestone | x-Ref |
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| Deliverable Name | Due Date | Date Delivered | Point of Contact |
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An assessment of the total effort and cost at completion of the project.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Analysis in Hours | | | | | | | Analysis in Dollars | | | | | | |
| WBS No. | Activity Description | Budget Hours | Actual Hours | Est. to Complete | Est. @ Complete | Variance (+ = More) | | Budget $ | Actual $ | Est. to Complete | Est. @ Complete | Variance (+ = More) |
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Documents Product Specifications with appropriate cross-references to other documents, if applicable.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| No. | Requirement | RFP Reference | SOW Reference | Task Reference | Specification Reference | Date Completed | Comments/Clarification |
| 1. |  |  |  |  |  |  |  |
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| 14. |  |  |  |  |  |  |  |
| 15. |  |  |  |  |  |  |  |

SOW = Statement of Work

*A description of project risks, the probability of the risk occurring, the impact of the risk on the project, and the suggested mitigation activities.*

Last Risk Assessment Date: Prepared by:

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Ref  # | Risk Category/ Event | Loss  Hours | Probability | Risk Hours | Previous Risk Hours | Preventive Measures | Contingency Measures | Responsible Person | Comments |
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*A description of project risks, the probability of the risk occurring, the impact of the risk on the project, and the suggested mitigation activities.*

Last Risk Assessment Date: Prepared by:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Category | Prob | Imp | Risk | Mitigation Approaches |
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Legend

Prob = Probability of Occurrence

Imp = Impact

Provide a configuration management plan that defines the person responsible for project configuration management, the procedures that will be used, the planned configuration items, planned release dates for configuration items, and resources required to conduct CM.

CM Responsibility

Manager:

Additional Staff for CM:

Procedure Reference:

Configuration Items:. Ensure that CM is implemented throughout the project’s life cycle.

|  |  |  |
| --- | --- | --- |
| No. | Item | Comments |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |

Ensure that project has a repository for storing configuration items and associated CM records. Briefly describe.

Provide a quality plan that defines the person responsible for project quality assurance, the procedures that will be used and resources required to conduct quality assurance.

QA Responsibility

Manager:

Additional Staff for QA:

Procedure Reference:

Planned Quality Event: Ensure that QA is implemented throughout the project’s life cycle. Dates include QA audits and reviews, design walkthroughs and other project activities that QA staff will participate in.

|  |  |  |
| --- | --- | --- |
| No. | Item | Comments |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |

Ensure that project has a repository for storing configuration items and associated QA records. Briefly describe.

Ensure that QA audits the baselines and CM activities on a regular basis. Briefly describe

*A list of known issues associated with the project along with current status.*

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| --- | --- | --- | --- | --- | --- |
| Ref  # | Issue Description | Responsible Individual | Open Date | Closure Date | Status |
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Maintain a list of action items, including a description of the item, a point of contact a date by which action should be taken and a description of the action taken to close items.

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| Action Item # | Action Item Description | Responsible Individual | Open Date | Closure Date | Status |
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| --- | --- |
| Customer:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Prepared by:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |

| WBS | Project Task | Labor  Hour | Labor  Rate | Labor  Cost | Material  Cost | Travel  Cost | Other  Cost | Total per Task |
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| Other: | |  |  |  |  |  |  |  |
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| Sub-Totals: | |  |  |  |  |  |  |  |
| Risk (Reserve) | |  |  |  |  |  |  |  |
| TOTAL (scheduled) | |  |  |  |  |  |  |  |
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| Comments: *(List assumptions for costs as appropriate.)* | | | | | | | | |
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| Task number: |  | Task name: |  |

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| Predecessor task(s): |  | Prepared by: |  |

|  |  |
| --- | --- |
| Deliverables: |  |

|  |  |
| --- | --- |
| Milestones: |  |

**Normal mode**

|  |  |  |  |
| --- | --- | --- | --- |
| **Resource** | **Units** | **Rate** | **Cost** |
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|  |  |  |  |
| **Total** |  |  |  |

**Crash Mode**

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| --- | --- | --- | --- |
| **Resource** | **Units** | **Rate** | **Cost** |
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|  |  |  |  |
| **Total** |  |  |  |

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| --- | --- |
| Equipment/Supplies/Facilities: |  |

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| --- | --- | --- | --- | --- | --- |
| Time estimate: |  | Must start: |  | Must finish: |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Optimistic T*o*: |  | Pessimistic T*p*: |  | Most likely T*m*: |  |

|  |  |
| --- | --- |
|  |  |
| Cost estimate: | $ |
|  |  |
|  |  |

*Notes:*

|  | **Item** | **Status** | **Location** | **Comments/**  **Plan to Resolve** |
| --- | --- | --- | --- | --- |
| **1** | **Planning** |  |  |  |
| 1.1 | Is the project statement -- scope, definition and objectives -- the same as agreed to in the Project Statement process |  |  |  |
| 1.2 | Has the Project Statement been reviewed as part of the baseline process? |  |  |  |
| 1.3 | Is there a baseline plan against which to measure progress? |  |  |  |
| 1.4 | Does the baseline plan address or include the following areas: |  |  |  |
| 1.4.1 | Project Scope, deliverables, and milestones |  |  |  |
| 1.4.2 | Work Breakdown Structure with task dependencies |  |  |  |
| 1.4.3 | Task plans, estimates, resource assignments |  |  |  |
| 1.4.4 | Project Schedule with milestone dates |  |  |  |
| 1.4.5 | Project progress tracking |  |  |  |
| 1.4.6 | Issue Resolution and Change Management |  |  |  |
| 1.4.7 | Quality Plan |  |  |  |
| 1.4.8 | Risk Management Plan |  |  |  |
| 1.4.9 | Project Organization |  |  |  |
|  | Other Plans as needed: |  |  |  |
| 1.4.10 | Facilities Plan |  |  |  |
| 1.4.11 | Documentation Plan |  |  |  |
| 1.4.12 | Materials Plan |  |  |  |
| 1.4.13 | Training Plan |  |  |  |
| 1.4.14 | Back-up and Recovery Plan |  |  |  |
| 1.4.15 | Contingency Plan |  |  |  |
| 1.4.16 | Cut Over or Transition Plan |  |  |  |
| 1.4.17 | Warranty Plan |  |  |  |
| 1.4.18 | Others: |  |  |  |
| 1.5 | Is the plan for project resources adequate? |  |  |  |
| 1.6 | Are the original project schedule and budget realistic? |  |  |  |
| 1.7 | Is the organization plan adequate? |  |  |  |
| 1.8 | Are there adequate project controls? |  |  |  |
| 1.9 | Is there an information system for the project? |  |  |  |
| 1.10 | Were key project stakeholders brought into project plan? |  |  |  |
| 1.11 | Were potential users involved early in the planning process? |  |  |  |
| 1.12 | Was planning completed before the project was initiated? |  |  |  |
| 1.13 | Is the plan under configuration management? |  |  |  |
| 1.14 | If there are vendors, have they signed off on the project plan? |  |  |  |
| 1.15 | If there is an independent oversight contractor, have they signed off on the project plan? |  |  |  |
| **2** | **Organization** |  |  |  |
| 2.1 | Is the Project Manager qualified and experienced in Project Management? |  |  |  |
| 2.2 | Have roles and responsibilities of the team been documented and clearly communicated to the team, customer, and stakeholders? |  |  |  |
| 2.3 | Is the organization structure appropriate for the project’s size and complexity? |  |  |  |
| 2.4 | Is there an identified role of a technical leader (i.e., Project Lead, Team Lead, Solution Architect)? |  |  |  |
| 2.5 | Is the quality audit function identified and assigned? |  |  |  |
| 2.6 | Does the Project Manager have adequate administration and technical support? |  |  |  |
| 2.7 | Is there a Change Control Manager? |  |  |  |
| 2.8 | Have the configuration management functions been assigned? |  |  |  |
| 2.9 | Are there backup strategies for key members of the project? |  |  |  |
| 2.10 | Other Organization items: |  |  |  |
| **3** | **Tracking & Monitoring** |  |  |  |
| 3.1 | Are the various types of reports, their contents, frequency, and audience defined and communicated to the project team? |  |  |  |
| 3.2 | Are the input requirements from the team members clearly documented and communicated? |  |  |  |
| 3.3 | Have the reports to be produced, distributed, and filed been defined? |  |  |  |
| 3.4 | Has the format for tracking and monitoring schedules and costs been defined? |  |  |  |
| **4** | **Reviewing** |  |  |  |
| 4.1 | Have the various meetings, the purpose, context, frequency, and participants been defined and communicated? |  |  |  |
| 4.2 | Have the meeting materials been defined? |  |  |  |
| 4.3 | Are the meetings set up to have assigned notes takers that will add action items/issues to the issue list? |  |  |  |
| **5** | **Issue Management** |  |  |  |
| 5.1 | Is an Issue Management Process documented? |  |  |  |
| 5.2 | Is this process communicated to the customer and team members? |  |  |  |
| 5.3 | Will an issue form be in use? |  |  |  |
| 5.4 | Will all project issues be unconditionally tracked through the issue resolution process? |  |  |  |
| 5.5 | Will all tasks resulting from issues be entered into the project plan and tracked through the plan? |  |  |  |
| 5.6 | Are there processes for unresolved issues to be escalated and resolved within a reasonable timeframe? |  |  |  |
| **6** | **Configuration Management (Change Control)** |  |  |  |
| 6.1 | Will there be a Change Control Process in place? |  |  |  |
| 6.2 | Is the Change Control Process documented and on file? |  |  |  |
| 6.3 | Has this process been communicated to the customer and project team? |  |  |  |
| 6.4 | Will there be a change request form in use? |  |  |  |
| 6.5 | Will all project deliverable and software configuration management be changed only through the change control process? |  |  |  |
| 6.6 | Will all change requests be unconditionally tracked through this process? |  |  |  |
| 6.7 | Will all change requests and current status be logged? |  |  |  |
| 6.8 | Will all tasks resulting from approved changes be entered into the project plan and tracked through the plan? |  |  |  |
| 6.9 | Will new change requests be acknowledged in a timely manner? |  |  |  |
| 6.10 | Has a method and process for requirement tracking been developed? |  |  |  |
| **7** | **Risk Management** |  |  |  |
| 7.1 | Will the project risks being managed be according to the project’s risk management process? |  |  |  |
| 7.2 | Will the Risk Worksheet be updated on a regular and frequent basis? |  |  |  |
| 7.3 | Will the Risk Status be reported to management on a regular and frequent basis? |  |  |  |
| 7.4 | Will there be documented contingency plans for the top 5-10 risks? |  |  |  |
| 7.5 | Will the Preventive Plans for the top 5 risks be identified, included in the project plan, and implemented? |  |  |  |
| **8** | **Quality Assurance** |  |  |  |
| 8.1 | Is there a Quality Assurance Plan documented? |  |  |  |
| 8.2 | Are the quality assurance functions and related roles and responsibilities clearly defined? |  |  |  |
| 8.3 | Are completion/verification criteria defined for each task producing an output? |  |  |  |
| 8.4 | Is there a process (test plans, inspections, reviews) defined for verifying outputs for each task? |  |  |  |
| 8.5 | Will tasks be marked “complete” only after internal QA has been successfully completed? |  |  |  |
| 8.6 | Will there be a formal process for submitting, logging, tracking, and reporting of items undergoing QA throughout the submit-test-rework-resubmit-retest cycle? |  |  |  |
| 8.7 | Will statistics related to QA be collected and problems raised as issues? |  |  |  |
| 8.8 | Will the QA related information be reported regularly as part of the Status Reporting mechanisms? |  |  |  |

**Comments:**

**Project**:  **Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Submitted by: Project Organization Area:

Project is: On Plan Ahead of Plan Behind Plan

Reporting Period: From: \_\_\_/\_\_\_/\_\_\_ To: \_\_\_/\_\_\_/\_\_\_

**Current Activity Status:**

*The description of activity should not span more than 2/3 lines. Activities should be linked to the project tasks list or WBS.*

**Significant Accomplishments:**

**Planned Activities for next period:**

*The description of each activity should not span more than 2/3 lines. Activities should be linked to WBS and WPI.*

**Financial Status:**

*Planned Versus Actual Costs:*

*Planned Versus Actual Schedule:*

*Planned Versus Actual Staffing:*

*ETC Projection (Time):*

*EAC Projection (Cost):*

**Technical Status/Issues:**

**Major Action Items:**

**Current Risk Status:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **WBS** | **Activity Description** | **Depend** | **Owner** | **Planned Schedule** | | | **Actual Schedule** | | | **Target Schedule** | | |
|  |  |  |  | Start | Finish | Dur. | Start | Finish | Dur. | Start | Finish | Dur. |
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| Comments: *All activities that are not meeting planned dates need to define: reason, approach to bring into conformance, and impact.* | | | | | | | | | | | | |

**Control Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Change Proposal Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Date Created:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Originator:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Organization:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Proposed Change Description and References:**

**Justification:**

**Impact of Not Implementing Proposed Change:**

**Alternatives:**

**Initial Impact Analysis**

**Baselines Affected:**

**Configuration Items Affected:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Cost / Schedule Impact Analysis Required? No\_\_\_ Yes\_\_\_**

**Analysis Prepared by:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Impact on Cost:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Impact on Schedule:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Impact on Resources:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Final Review Results:**

**Review Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Classification:** \_\_\_\_**HIGH**  \_\_\_\_**MEDIUM** \_\_\_\_**LOW**

**Review Results:**

**Review Date:** \_\_\_\_\_\_\_\_\_\_\_\_**Assigned to:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Organization:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_**Approve for Implementation**  \_\_\_**Reject** \_\_\_**Defer Until:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reason:**

**Signature of Responsible Person:**

**Control Number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Project Name:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:**\_\_\_\_\_\_\_\_\_\_\_\_

**Requester:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Organization:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Issue Type (check one)**

\_\_\_**Request for Information** \_\_\_**System Problem**  \_\_\_**Procedural Problem** \_\_\_**Other**

**(Specify)**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Description:**

**Recommendation**

**Impact (if not resolved)**

**Date Resolution Needed:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Proposed Assignee:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Attachments (if any):**

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**Reviewer:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Review Completion Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reviewer Comments:**

**Estimate of Additional Effort:**

**Cost / Schedule Impact Analysis Required? Yes\_\_\_ No\_\_\_**

**Resource Requirements \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Work Days or Cost** \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

**Recommendation (check one)**

\_\_\_**Accept** \_\_\_**Defer**  \_\_\_**Need Additional Information**  \_\_\_**Reject**

**Assigned to:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Organization:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Planned Completion Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Comments:**

**Project Manager Signature:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Actual Completion Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Approval Signature:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Post Implementation Evaluation Report Template**

The ITEC Policy 2530 establishes requirements for a Post Implementation Evaluation Report (PIER). The report is referenced in the Project Management Methodology manual under the “Close Out” section. The PIER documents the history of a project and provides recommendations for other projects of similar size and scope. The PIER is to be completed on each project when cancelled or completed. A copy needs to be provided to the appropriate branch Chief Information Technology Officer (CITO) immediately following project completion or cancellation but no longer than six months.

Sample Table of Contents:

Executive Summary

Project Objectives

Business Areas

Project Personnel and Organization

Project History and Time line

Risk Assessment and Mitigation Techniques

Change Control, Quality and Configuration Management Techniques

Project Communication

Customer Expectations

Project Results

Financial Data

Lessons Learned

Recommendations for Future Projects

Sample PIER Report:

Executive Summary

Discussion of key points of the project (maximum 1 page)

Project Objectives

What were the objectives the project was to accomplish

What was the business problem that needed to be solved

Business Areas

Who were the project customers and a description of the business areas covered by the project

Project Personnel and Organization

A listing of project personnel including their functional title

The project Organizational Chart

Project History and Timeline

An overview of the major activities of the project and how they were accomplished

Gantt Chart showing a high level summary of the activities and timeline

Risk Assessment and Mitigation Techniques

What risks occurred and what techniques were used to mitigate these risks

Change Control, Quality and Configuration Management Techniques

What techniques were used to ensure change control, quality and configuration management and their effectiveness

Project Communication

What techniques were used to ensure communication and their effectiveness

Customer Expectations

How were customer expectations identified and met, techniques for handling them

What were the success factors and how they were met

Project Results

Statistical/Financial Data

**Planned versus actual final schedule data (Estimated Cost at Completion ITEC PM02 – 8)**

**Planned versus actual final resource data**

**Planned versus actual final project cost (should be broken down by internal and external cost for Planning, Execution and Close-Out)**

Lessons Learned

Key findings of the Lessons Learned including recommendations

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***Project:*** | | | | | | ***Date:*** |
| A record of decisions made throughout the project. Information should include: the decision date, a description, meeting in which decision occurred, the current project phase, the project phase(s) affected, the decision maker(s) and clarification comments, if needed. | | | | | | |
|
| ***Decision Date*** | ***Description of Decision*** | ***Meeting in Which Decision Made*** | ***Current Project Phase*** | ***Affected Project Phase*** | ***Decision Maker(s)*** | ***Additional Comments*** |
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