**PROJECT MANAGEMENT PLAN**

The Project Management Plan provides builds off the Project Charter and documents a comprehensive baseline of what must be achieved by the project, how it is to be achieved, who will be involved, how it will be reported and measured, and how information will be communicated.

|  |
| --- |
| **KEY PROJECT INFORMATION** |
| *This table should be completed by ITS PPMO POC or the Project Manager, as it provides general information about the project.* |
| **PROJECT NAME** |  |
| **SPONSOR NAME** |  | **ITS OWNER NAME** |  |
| **SPONSOR ORG** |  | **ITS PROJECT MANAGER** |  |
| **SPONSOR POC** |  | **SPONSOR PROJECT MANAGER** |  |
| **IMPACT GROUP** | <Faculty / Staff / Students> | **IMPACT SCOPE** | <All / High / Medium / Low / None> |
| **AUDIT TASK NUMBER(S)** | <List all audit task number(s) associated with this project or enter ‘N/A’> |
| **ITS SERVICE TICKET(S)** | <List all related ITS PPMO, ITS Communications, and ITS ASRB service tickets here or enter ‘N/A’> |
| **DOCUMENT AUTHOR** | <Last Name, First Name> | **DOCUMENT DATE** | <MM/DD/YYYY> |

| **REVISION HISTORY** |
| --- |

|  |  |  |  |
| --- | --- | --- | --- |
| **VERSION** | **DATE** | **ORGANIZATION/AUTHOR** | **DESCRIPTION OF CHANGES** |
|  | <MM/DD/YYYY> |  |  |
|  | <MM/DD/YYYY> |  |  |
|  | <MM/DD/YYYY> |  |  |

| **NOTE TO ALL USERS** |
| --- |
| Helper-text in white table cells bound by “< >” are designed to help the user with content. Once the user starts typing, the helper texts will automatically be written over and removed.Texts in table cells shaded gray are fixed and shouldn’t be edited.After completing document, update the **Table of Contents** by “right-clicking” and selecting “update field” to update the page numbers for each section as they may have changed. Make sure to update the cover page, version history, and headers/footers as well.If you have any questions about this template or the IT Project Management Lifecycle, please contact the ITS Portfolio and Project Management Office at pmo@gmu.edu. |

Table of Contents

[**EXECUTIVE OVERVIEW** 3](#_Toc90290125)

[**PROJECT EXECUTION APPROACH** 4](#_Toc90290126)

[**SCOPE MANAGEMENT** 4](#_Toc90290127)

[**COST MANAGEMENT** 4](#_Toc90290128)

[**ROLES AND RESPONSIBILITIES FOR THE COST MANAGEMENT PLAN** 5](#_Toc90290129)

[**SCHEDULE MANAGEMENT PLAN** 5](#_Toc90290130)

[**PROJECT MILESTONES THAT CONSTRAIN THE SCHEDULE** 5](#_Toc90290131)

[**PROJECT SCHEDULE TOOLS** 6](#_Toc90290132)

[**ROLES AND RESPONSIBILITIES FOR THE PROJECT SCHEDULE** 6](#_Toc90290133)

[**WORK BREAKDOWN STRUCTURE MANAGEMENT** 7](#_Toc90290134)

[**RESOURCE MANAGEMENT** 7](#_Toc90290135)

[**PROJECT TEAM** 7](#_Toc90290136)

[**STAKEHOLDER ENGAGEMENT** 9](#_Toc90290137)

[**PROJECT MANAGEMENT COMMUNICATION** 9](#_Toc90290138)

[**ORGANIZATIONAL CHANGE MANAGEMENT** 10](#_Toc90290139)

[**RISK MANAGEMENT** 10](#_Toc90290140)

[**ISSUE MANAGEMENT** 10](#_Toc90290141)

[**APPENDIX A: SUPPLEMENTAL PLAN TOPICS** 12](#_Toc90290142)

[**REQUIREMENTS MANAGEMENT** 12](#_Toc90290143)

[**QUALITY MANAGEMENT** 12](#_Toc90290144)

[**QUALITY BASELINE** 12](#_Toc90290145)

[**SECURITY MANAGEMENT** 13](#_Toc90290146)

[**TRAINING PLAN** 13](#_Toc90290147)

[**APPROVALS** 14](#_Toc90290148)

| **EXECUTIVE OVERVIEW** |
| --- |
| *The Executive Overview of the Project Management Plan builds on what is included in the Executive Overview of the previously created Project Charter. While the Charter describes WHAT the project is intended to accomplish, the Project Management Plan may contain many of the same elements. This document needs to expand upon high-level elements of HOW this project will be run, WHO the participants are that will be executing and delivering the project’s scope and WHEN key events are expected to occur. Copy any relevant text from the Charter and edit as required.* |
|  |

| **PROJECT EXECUTION APPROACH** |
| --- |
| *There are multiple approaches to managing a project through execution. Select the methodology that most closely describes the approach to be used for this project by placing an ‘X’ next to the selected approach.* |
|

|  |  |
| --- | --- |
|  | Standard Waterfall |
|  | Iterative/Agile (Scrum) |
|  | Kanban |
|  | Hybrid/Combination |
|  | Other: <specify here> |

 |
| **Approach Description** | <Describe that approach. Include any Project Lifecycle diagram needed and explain all the phases and stages that will be used as part of this approach> |

| **SCOPE MANAGEMENT** |
| --- |
| *Project Scope Management is the process of maintaining control over those activities and deliverables that fall within the scope of each project and managing changes if they arise. Complete the following statements to explain your approach to this topic.* |
| **Scope change requests must be submitted to:** | <Group, person, or system who/that will document and perform triage to scope change requests> |
| **Scope change requests must be reviewed by an additional group or person when:** | <Conditions that trigger a review of scope change requests beyond the initial triage> |
| **Scope change requests that require additional review will be submitted for approval to:** | <Secondary group or person who will approve or deny scope change requests when required> |
| **Scope change requests will be documented using:** | <Process used to record change requests and actions taken as a result> |

| **COST MANAGEMENT** |
| --- |
| *The cost management plan sets the format and standards by which the project costs are measured, reported and controlled. This section builds on the estimated costs identified in the Charter document and further refines the project costs for each category including hardware, software, licensing, and non-Mason labor/consulting services. Note that the Mason labor needs for the project are outlined in the Resource Management section below. Copy from Charter and edit as required.* |

| **CATEGORY** | **OVERVIEW** | **IMPLEMENTATION****COSTS** | **OPERATIONS COSTS** |
| --- | --- | --- | --- |
| **Hardware** |  |  |  |
| **Software** |  |  |  |
| **Subscription / Licensing** |  |  |  |
| **Services / Non-Mason Labor** |  |  |  |
| **Mason Labor** | *See Resource Management Section* |  |  |
| <Other Costs> |  |  |  |

| **ROLES AND RESPONSIBILITIES FOR THE COST MANAGEMENT PLAN** |
| --- |
| *Complete the following statements to explain your approach to this topic.* |
| **The project costs will be managed by** | <Who or what group will manage the costs?> |
| **Approvals of expenditures and changes to project costs will be the responsibility of** | <Who or what group will have the authority to approve expenditures and changes to the project or its budget?> |
| **When applicable, vendor charges will be verified and managed by** | <Who or what group will have the authority to approve time and charges from any vendor(s) working on this project?> |
| **Cost performance will be quantitatively measured and reported on by** | <Who or what group will monitor and report on project costs? What cost report format and frequency will be used, and to whom will they be presented?> |

| **SCHEDULE MANAGEMENT PLAN** |
| --- |
| *Effective schedule management is necessary for ensuring tasks are completed on time, resources are allocated appropriately, and to help measure project performance. This section should include discussion of the scheduling tool/format, schedule milestones, and schedule development roles and responsibilities.* |
|  |

| **PROJECT MILESTONES THAT CONSTRAIN THE SCHEDULE** |
| --- |
| *Milestones identify the scheduled completion of major deliverables and key external interfaces over the project lifecycle. Some milestones are locked and identified at early stages of the project. These milestones can frequently constrain timing of the project. Use the table below to document the “Fixed Date” milestones and how they impact the schedule. Example: A software license may be expiring, and that expiration date may constrain the schedule to complete tasks before that date.* |

| **MILESTONE DATE** | **MILESTONE NAME** | **DESCRIPTION OF PROJECT SCHEDULE IMPACT** |
| --- | --- | --- |
| <MM/DD/YYYY> |  |  |
| <MM/DD/YYYY> |  |  |
| <MM/DD/YYYY> |  |  |
| <MM/DD/YYYY> |  |  |
| <MM/DD/YYYY> |  |  |
| <MM/DD/YYYY> |  |  |

| **PROJECT SCHEDULE TOOLS** |
| --- |
| *Complete the following statements to address the tools used for this project’s schedule and related tasks. Ensure you document the schedule of record and if needed, include additional references to other tools that will be used. Remove the gray helper text as you complete the bullets.* |
| **The project schedule of record will be maintained using:** | <What tool will be used?> |
| **The digital files for this project will be located:** | <Where will you store the files? – ex: “…in MS Teams site with a synchronized copy on the PM’s PC”> |
| **Ongoing dissemination/socialization of the project schedule will be done using:** | <What tool/process will be used to send out schedule status updates? – ex: “…the project web site within Project Online”> |

| **ROLES AND RESPONSIBILITIES FOR THE PROJECT SCHEDULE** |
| --- |
| *Complete this section to indicate who will be acting to manage the Schedule. Remove the gray helper text as you complete the bullets.* |
| **The initial schedule will be created by** | <Who or what group will create the initial schedule?> |
| **Ongoing updates and schedule maintenance will be the responsibility of** | <Who or what group will be maintaining the schedule of record?> |
| **Changes to the schedule must be approved if** | <What is the threshold that will trigger the need for approval of a schedule change? – ex: “…the change impacts the date of a key deliverable”> |
| **Changes to the schedule will be approved by** | <Who or what group will need to provide approval if the change to the schedule requires oversight?> |

| **WORK BREAKDOWN STRUCTURE MANAGEMENT** |
| --- |
| *A Work Breakdown Structure (WBS) subdivides project deliverables and associated project work into smaller, more manageable components. It shows work to be executed by the project team to accomplish the project goals and create the required deliverables. Show how this projects work will be organized using one of the example formats show in APPENDIX C or your own structure to create a representation of the hierarchy you will use. Where possible, name items specifically for your project. Include top level items for the entire project and lower-level items/work packages that are known at this stage (even if that includes generic terms). The full detailed WBS should be included in your actual project plan, but this description should include enough information to illustrate how you plan to organize the project schedule.* |
|  |

| **RESOURCE (PEOPLE) MANAGEMENT** |
| --- |
| *Explain how you plan to staff the project. This section should include discussion on matrixed or project-specific organizational structure if either or both arrangements are being used for this project. This section should also include how resources will be procured and managed, as well as the key resources needed for the project.* |
| **How will you engage with resources required to complete the project?** |  |
| **Are the required resources already familiar with the project? Describe.** |  |
| **Have the managers of the resources agreed to the timelines and skill sets required and are they providing support? Describe.** |  |
| **How will you handle resource constraints?** |  |
| **Does the project risk level require you to consider alternate resources (personnel, equipment, tools) in case of constraints or issues?** |  |

| **PROJECT TEAM** |
| --- |
| *List roles and resources required to perform the work of this project in the table below. The responsibilities are provided as guidelines for the expectations of the typical project roles; edit them as they apply to the roles on this specific project* |

| **PROJECT ROLE**  | **NAMED RESOURCE** | **RESPONSIBILITIES** |
| --- | --- | --- |
| **Project Sponsor** |  | * Ultimate decision-maker
* Provides project oversight and guidance.
* Reviews/approves some project elements.
* Approves Changes to Scope
 |
| **ITS Program Portfolio Manager** |  | * Manages program-level activities.
* Assigns portfolio resources.
* Provides guidance and direction to the project manager.
* Reviews and approves changes to scope.
 |
| **ITS Project Manager** |  | * Manages project in accordance with the project plan.
* Receives guidance from Program Manager.
* Provides overall project direction.
* Directs/leads team members toward project objectives.
* Handles problem resolution.
* Conducts initial customer outreach.
* Determines any special needs of the customer.
 |
| **Vendor Project Manager** |  | * Liaises and coordinates field activities.
* Evaluates current business practices for efficacy.
* Reviews and documents current practices
* Recommends business improvements.
* Interprets business needs into “To-Be” business requirements.
 |
| **Quality Lead, ITS****(Matrix)** |  | * Evaluates business processes and practices from a quality perspective.
* Develops Requirements Traceability Matrix, Test Plan and test scripts, based on requirements.
* Recommends business improvements to conform to best practices and policy adherence.
* Tests product and reports test results against requirements
 |
| **Product Owner** |  | * Establishes requirements.
* Requests changes
* Provides User Acceptance
 |
| **Key User / Subject Matter Expert** |  | * Provides design input.
* Verifies requirements.
* Performs User Acceptance test
 |

| **STAKEHOLDER ENGAGEMENT** |
| --- |
| *The list of stakeholders involved can be found below. They are listed in terms of their interest, influence and involvement. For those who are adopters of the project, we should be sure to connect them during meetings so they can discuss the value proposition with all relevant stakeholders which will garner more influence and support. For those stakeholders who may be seen as detractors from the project, we must ensure we update them frequently, relay the importance of completing the project and allay their concerns within our realm of responsibility.*  |

| **STAKEHOLDER** | **STAKE (ROLE, INFLUENCE, REASON)** | **ENGAGEMENT METHOD** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| **PROJECT MANAGEMENT COMMUNICATION** |
| --- |
| *Provide a brief description of the communication plan to be followed on this project. This could include, but is not limited to team status meetings, leadership meetings (if any), Executive level meetings, etc. Samples are included in the table below.**The Communication Plan below details the deliverables, tools and in-person meetings used to facilitate timely reporting and communication amongst project leadership and team members. The purpose is to ensure that all stakeholders are apprised of progress throughout the project’s lifecycle.* |

| **REQUIREMENT** | **OWNER** | **FREQUENCY / CONTENT** | **FORMAT** | **ATTENDEES / DISTRIBUTION LIST** |
| --- | --- | --- | --- | --- |
| *Portfolio Status* | *Program Manager* | *Weekly on Wednesday* | *PDF* | *Sponsor, Stakeholders, Project Managers* |
| *Project Staff* | *Project Manager* | *Weekly on Monday. Discuss accomplishments, upcoming activities, and risks and issues.* | *Meeting* | *Designated project team members* |
| *Status Report* | *Project Manager* | *Weekly on Monday. This report will describe work accomplished this week, work to be done next week, decisions required, and any issues/concerns* |  *Word (template)* |  *Program Manager, Product Owner* |

| **ORGANIZATIONAL CHANGE MANAGEMENT** |
| --- |
| *This section is intended to document how the project will gain acceptance and buy-in from those impacted by the change this project will create. It should include a reference to the change expected, the impact of that change, and the approach to mitigate resistance to the change. This will typically be a marketing strategy that includes a value proposition for the impacted group. Sample content is provided for you below.* |
| *“The project manager is responsible for overseeing the risk management process throughout the duration of the project, proactively identifying risks, and taking the appropriate actions to prevent or mitigate them. When a risk is identified, it is first assessed to ascertain the probability of occurrence, the degree of impact to the project schedule, scope, cost, and quality, then prioritized. The probability of occurrence (Not likely, Likely, Most Likely), and the degree of impact (High, Medium, Low) will be used as the basis for assigning the risk priority. All identifiable risks will be entered into a risk register and documented as a risk statement. High priority risks will be included in Status Reports for communication.”* |

| **RISK MANAGEMENT** |
| --- |
| *This process prescribes how risks are identified, evaluated, monitored, and controlled. The main objective of risk management is to decrease the probability and impact of negative events, and exploit opportunities that have positive impact on the project. This section provides a general description of the approach being taken to identify and manage risks associated with each project. Sample content is provided for you below.* |
| *“The project team will employ a communication plan to socialize the project across the customer/stakeholder group. The socialization will include reoccurring ITS communications managed by the ITS Communications team that illustrate the need and benefit of the change. As soon as it is possible and prior to the project’s transition to operations, the project team will engage the customer/stakeholder group in training to ensure they are prepared for that transition. Following the transition to operations, the project team will remain active during a period of stabilization.”* |

| **ISSUE MANAGEMENT** |
| --- |
| *Issues are unplanned events that have happened and may have an impact on the project objectives. The purpose of issue management is to identify, document and resolve issues. Most of the mitigation efforts should be focused on issues that pose the greatest potential threat to project success. Open issues should be reviewed at each project team status meeting and progress made on the issues should be recorded in the issue log. An issue escalation process should be determined as a part of the overall issue management planning activities and should be documented.**When possible and practical, team leaders will try to resolve non-technical issues relating to their team or collaboratively with other teams. When issues cannot be resolved in a timely manner, or the team leader does not have the authority to make the decision, the project manager will be engaged to resolve the issue. If the issue cannot be resolved by the project manager or when an issue has arisen that affects the schedule, scope, cost, or quality of the project, the project manager will contact the project owner and/or project sponsor as soon as practical for guidance. Under such situations, Issue Identification and resolution will follow the change management process.* |
| *Describe the approach to ensure all issues:** *Are identified and documented in issue tracker or log*
* *Are prioritized*
* *Are assigned specific owners*
* *Are given next steps and the due dates documented*
* *Have ownership clearly communicated to those responsible for action items*
* *Are reviewed regularly (e.g., daily for complex projects and at least weekly for simple projects)*
 |

# **APPENDIX A: SUPPLEMENTAL PLAN TOPICS**

In addition to the sections above, below are supplemental questions and topics for the user to consider. These topics are laid out to allow the user to think about other vital areas that may be impacted by the project. Completion of these topics is dependent on the size, scope, and type of the project and may not be needed for all projects. Please complete as necessary.

| **REQUIREMENTS MANAGEMENT** |
| --- |
| *This section describes the processes and approaches for planning, monitoring, analyzing, communicating, and managing the requirements of the Project.* |
| *Consider the following when managing requirements:** *Identify and name those responsible for* ***providing, refining, fulfilling, and testing requirements****. Project Manager may choose to note responsible parties in Team matrix for requirements management.*
* *Requirements are often derived from the Project Charter and other artifacts which are subsequently interpreted in design document/s.*
* *Specific requirements need not be elaborated within this document, except perhaps by reference.*
* *The project manager is responsible for* ***monitoring*** *how project team addresses the requirements by* ***providing deliverables in acceptable form and with quality****.*
 |

| **QUALITY MANAGEMENT** |
| --- |
| *This process ensures that the deliverables for the project meet a formally established standard of acceptance. All project deliverables should be defined to provide a foundation and understanding of the tasks at-hand and what work must be planned. This section should include quality roles and responsibilities, quality control, quality assurance, and quality monitoring.* |
|  |

| **QUALITY BASELINE** |
| --- |
| *This section should include the quality baseline for the project. The purpose of this baseline is to provide a basis for ensuring that quality can be measured to determine if acceptable quality levels have been achieved.* |

| **ITEM** | **ACCEPTABLE LEVEL** | **COMMENTS** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

| **SECURITY MANAGEMENT** |
| --- |
| *Describe how the integrity, availability, and confidentiality of all data, files, and records related to the project will be managed in accordance with applicable state and federal laws, rules and regulations, and Mason’s IT Security Office (ITSO) specific protocols. If applicable, ensure that each outside vendor has been fully vetted according to our Third-Party Management program by checking for the availability of vendor SOC and SOC2 reports as well as when those reports were assessed by ITSO.* |
| *Consider the following when managing a project.*1. *Is project outcome linked to a specific audit finding? If so, consult with the ITSO Security Officer and internal audit for both information-gathering and sharing as the project progresses.*
2. *Will any of the work items require changes to firewall, security access, sensitive shared file systems or data?*
3. *Will any of the work items require systems engineering or network hardware/software changes? If so, Log Team Dynamix (TDX) tickets required to fulfill project requirements related to security/access.*
4. *If this project will involve the ability to consume and share sensitive data as a deliverable, identify:*
	1. *The administrators of the systems, servers, applications, databases, etc.*
	2. *The management model for the data and the data flow*
	3. *The roles of those involved*
5. *Have all project team members and stakeholder have been made aware of Mason policies regarding the handling of sensitive data? If not, direct them to Policy 1114 via:* [*https://universitypolicy.gmu.edu/all-policies/*](https://universitypolicy.gmu.edu/all-policies/)

*Ensure project follows ITS Information Security Standard during project planning and implementation and be sure to consult with ITSO in all projects, particularly during gate reviews.  The link to ITS Security Standards can be found here:*[*https://its.gmu.edu/working-with-its/it-security-office/it-security-standards/its-information-technology-security-standard/*](https://its.gmu.edu/working-with-its/it-security-office/it-security-standards/its-information-technology-security-standard/) |

| **TRAINING PLAN** |
| --- |
| *Not every project will have a requirement for Training. If this project does not, enter “N/A” under table heading.* *The Training Plan outlines the objectives, needs, strategy and curriculum to be addressed when training users on the new or enhanced product, system, or process. The plan will present the activities needed to support the development of training materials, coordination of training schedules, reservation of personnel and facilities, planning for training needs, and other training-related tasks. Training activities are developed to teach users the use of the system as specified in the training criteria. List necessary training proposed for the project.* |

| **STAKEHOLDER GROUP** | **TYPE OF TRAINING REQUIRED** | **SUGGESTED TRAINING AIDS** | **TRAINING LOCATION** | **TRAINING DATE(S)** |
| --- | --- | --- | --- | --- |
|  |  |  |  | <MM/DD/YYYY> |
|  |  |  |  | <MM/DD/YYYY> |
|  |  |  |  | <MM/DD/YYYY> |
|  |  |  |  | <MM/DD/YYYY> |

| **APPROVALS** |
| --- |
| *By all stakeholders agreeing to the scope, resource types, and deliverables required to successfully complete this project, the individuals listed approve the formal initiation of this project and grant authority to commit resources and direct/lead the project activities through planning, execution of delivery, monitoring and control, transition to operations, and project closure.* |

| **ROLE** | **NAME / TITLE** | **SIGNATURE** | **DATE** |
| --- | --- | --- | --- |
| **Sponsor:** |  |  | <MM/DD/YYYY> |
| **Sponsor POC:** |  |  | <MM/DD/YYYY> |
| **ITS Reviewer:** |  |  | <MM/DD/YYYY> |
| **<Additional>** |  |  | <MM/DD/YYYY> |
| **<Additional>** |  |  | <MM/DD/YYYY> |

Once this document is completed, the readiness review meeting has occurred, and signatures have been acquired, submit this Project Planning document, the project schedule, and communication plan package to the PMO. Email approvals are accepted in place of a signature but must be appended to the end of this document.

*Next: Acceptance of Deliverables*