Project Templates

Templates + Explanations

Contains the project management templates that are useful throughout the life of a given project. These templates cover the initiation, planning, execution, and closing stages of a project. Accompanying each template is a table explaining its context and usefulness.

Bryce Hanson

5/5/2011

Template Notes: Charter

What is the context of the template?	During the initiation stage of the Project
Why is the template important?	Outlines the scope of the project and acts as a mechanism to obtain buy-in from stakeholders
What problem does the template solve?	A Charter gets all stakeholders on "the same page" and can be referred to throughout the project to manage customer expectations. Most importantly, it gets the ball rolling and gets the project to gain momentum.
From whom is the information in the template gathered from?	Information is gathered from all stakeholders within the project.
To whom is the information in the template provided?	All stakeholders should have access to the Charter throughout the project.
What is the best format to gather and communicate the information?	Information would be best gathered in a meeting with all stakeholders. The Project manager should then fill in and finalize the Charter. After approval from all stakeholders, each stakeholder should sign the document to commit to project completion. Charter should be in a Word document format. A hard copy with signatures should be kept on file.

Project Charter

Project Name: **Click here to enter text.**

Prepared By: **Click here to enter text.** **Click here to enter a date.**

PROJECT CHARTER PURPOSE

The project charter defines the scope, objectives, and overall approach for the work to be completed. It is a critical element for initiating, planning, executing, controlling, and assessing the project. It should be the single point of reference on the project for project goals and objectives, scope, organization, estimates, work plan, and budget. In addition, it serves as a contract between the Project Team and the Project Sponsors, stating what will be delivered according to the budget, time constraints, risks, resources, and standards agreed upon for the project.

PROJECT OVERVIEW

[Replace this text with the rationale and business justification for undertaking this project.]

PROJECT SCOPE

The project scope section describes the parameters of the project; what will be accomplished by the project, and what the projects output will be.

Goals and Objectives

Goals	Objectives
[Replace this text with Project Goals. For example: The project will provide an improved system for managing product returns.]	**[Replace this text with Objectives for each Goal. For example:** **1. Develop a system by June that tracks an end-to-end process for 100% of product returns.** **2. Integrate new system with Sales in order to improve customer satisfaction 40% by year end.]**
	Note: Press "Tab" key to move to the next cell or add another row

Departmental Impacts

Department	Impact to and Participation of Organization
[Replace with name of Department]	**[Replace with the impact and participation of the organization]**

Project Deliverables

Deliverables are the desired output of a project. Deliverables are usually tangible products or documents that are delivered to an internal or external customer.

Significant stages of a project are separated into milestones*. The milestones of a project are determined by grouping the project deliverables into logical work packages that will be completed throughout the project. Milestones are used to measure the progress towards the project outcome.*

Milestone	Deliverable
1. Milestone 1	**• [Deliverable 1—description. Examples: feasibility study report, financial due diligence report, prototype design, etc…]** **• [Deliverable 2—description]** **• [Deliverable *n*—description]**
2. Milestone 2	**• [Deliverable 1—description]** **• [Deliverable 2—description]** **• [Deliverable *n*—description]**
3.	•

Deliverables Out of Scope

Specify what deliverables are not to be included in the project. Deliverables that are not included in the project are known as “outside of the scope of the project.” Agreeing on deliverables out of scope of the project sets expectations and prevents the project from getting out of control.

Replace this text with a description of key logical areas not considered part of the boundaries of this project. Examples of these Out-of-Scope Deliverables may include data, processes, applications, or business management.

Project Estimated Costs & Duration

Double click to use worksheet								

PROJECT CONDITIONS

The project conditions section explains the environment in which the project is operating.

Project Assumptions

Project assumptions are conditions or resources that are expected to be available for the project to be accomplished on time.

- [Assumption 1. Examples: Project staff will be available as needed; Equipment order lead times are known and can be expected to be met; formal charter or scope change procedures will be followed, etc…]
- [Assumption 2]
- [Assumption 3]

Project Risks

List any risks to the project that might occur and how you plan to handle them.

#	Risk	Likelihood	Risk Owner	Project Impact-Mitigation Plan
1	[Project Risk. Example: reorganization may result in the loss of key people being reassigned]	[High/Medium/Low]	[name]	[Replace this text with a description of the Mitigation Plan. Example: This will affect the project schedule and could push back completion past the stated delivery date. We plan to develop exit strategies for key people to plan the reassignment of duties]
2	[Project Risk]	[High/Medium/Low]		[Replace this text with a description of the Mitigation Plan.]

Project Constraints

Project constraints are limits placed on the project that are outside of the control of the project manager.

- [Replace this text with a description of a Constraint. Examples: Budget limit, hiring freeze, etc…]
- [Constraint 2]
- [Constraint 3]

Project Team Responsibility Matrix

This template outlines the responsibilities of team members. It reduces confusion and increases team member accountability. This table is filled out with the participation of all of the individuals included therein.

	Project Team				
Task	**Bill**	**Larry**	**Moe**	**Curly**	**Sue**
Example: **Identify Target Customers**	R	A			I

Key	
Responsible	**R**
Assists	**A**
Information	**I**
Decides	**D**

Signatures

Project Manager: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

[Role in Project]: ____
Name: Click here to enter text.
Telephone: Click here to enter text.
Email: Click here to enter text.

Template Notes: WBS

What is the context of the template? (Where does it fit in the Project Life Cycle?)	During the Planning stage of the Project after the Charter/scope has been finalized and before scheduling/budgeting.
Why is the template important? (What need does it fill and why? What is the purpose?)	The WBS is used to establish a "breakdown" of the tasks of the project into manageable units. It is essential when scheduling and budgeting for the project.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	Confusion about the number and relationships between tasks in the project. Is used to gather information and aids communication in the beginning stages of the project. If the WBS is not done, resource leveling is near impossible, because there won't be enough information to do so.
From whom is the information in the template gathered from? (Where do we get the information?)	Subject Matter Experts (SMEs) for each of the major tasks.
To whom is the information in the template provided? (Who is the intended audience and why?)	WBS should be provided to any managers within the project. It should also be shared with those that are developing schedules and/or budgets.
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	The WBS should be constructed in an excel spreadsheet or in an MS Project file.

WBS Excel Spreadsheet

Task ID #	Description
1	**Build Spaceship**
1.1	Research Spaceship building on the internet
1.2	**Construct spaceship**
1.2.1	buy materials
1.2.2	assemble materials
2	**Fly around in spaceship**
3	**Go where no man has gone before**
3.1	find out where man has gone
3.2	aim space ship in opposite direction
3.3	increase throttle
4	**return home**
5	**Celebrate**
<---Right click here to insert more rows.	
	END OF PROJECT

bhanson:
Indent and outdent tasks using the paragraph indent controls in the Home ribbon (next to the align text right button). Indentation of a task is what controls its WBS numbering

bhanson:
Do not delete the contents of this cell !

bhanson:
Click on this Button to refresh the WBS numbering scheme.

Template Notes: Responsibility Matrix

What is the context of the template? (Where does it fit in the Project Life Cycle?)	During the early planning stages of the project.
Why is the template important? (What need does it fill and why? What is the purpose?)	The responsibility matrix outlines the roles of all the stakeholders in the project. It tells whether the stakeholder assists, informs, decides, or is responsible for the project task.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	This template addresses a lack of hierarchy in the project. It establishes accountability between project members.
From whom is the information in the template gathered from? (Where do we get the information?)	All stakeholders/members of the project
To whom is the information in the template provided? (Who is the intended audience and why?)	All stakeholders/members of the project
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	Use a table in MS Word or an Excel spreadsheet to create a Responsibility matrix.

Project Team Responsibility Matrix

This template outlines the responsibilities of team members. It reduces confusion and increases team member accountability. This table is filled out with the participation of all of the individuals included therein.

	Project Team				
Task	**Bill**	**Larry**	**Moe**	**Curly**	**Sue**
Example: **Identify Target Customers**	R	A			I

Key	
Responsible	**R**
Assists	**A**
Information	**I**
Decides	**D**

Template Notes: Communication Plan Matrix

What is the context of the template? (Where does it fit in the Project Life Cycle?)	During the planning stage of the project.
Why is the template important? (What need does it fill and why? What is the purpose?)	This template establishes the communication structure for the project. It establishes what needs to be communicated to who, in what format and how often.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	Solves communication inefficiencies and creates accountability for communicating project updates. If a communication plan is not created, necessary updates might not be communicated to those that need to know. Also, without a communication plan, project team members might have their inboxes deluged with unnecessary project updates.
From whom is the information in the template gathered from? (Where do we get the information?)	All Project Stakeholders, but especially the managers within the project.
To whom is the information in the template provided? (Who is the intended audience and why?)	All Project Stakeholders on a need to know basis.
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	The matrix should be created in either a table in MS Word or in an Excel Spreadsheet.

Communication Plan Matrix

Description

This document ensures that all stakeholders are equally informed of how, when, and why communication will happen. Communication is often a very effective way to solve problems, deal with risks, and ensure that tasks are completed on time.

Successful communication plans will identify stakeholders, the information to be communicated, and how this information will be communicated. They will leave nothing to chance.

Communication	Purpose	Audience	Frequency	Method	Point of Contact
Example: **Project updates**	Example: To Monitor and measure the progress of the project	Example: All project participants	Example: First Monday of the month	Example: Email	*Example:* Bryce Hanson

Template Notes: Bottom-up Estimating (PERT)

What is the context of the template? (Where does it fit in the Project Life Cycle?)	This template is used during the later end of the defining stage and towards the beginning of the Planning Stage
Why is the template important? (What need does it fill and why? What is the purpose?)	This template helps in obtaining accurate estimates for the time it will take to complete a work package.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	This template helps in gathering the information from the many people working on the project. Once completed, the Project manager will be able to accurately schedule and allocate the budget for the project.
From whom is the information in the template gathered from? (Where do we get the information?)	Information for this template is gathered from the individuals that are assigned the work package. Take into consideration the expertise of the individual when gathering the information
To whom is the information in the template provided? (Who is the intended audience and why?)	This information is provided to the Project manager which will use it to communicate the schedule and budget to stakeholders on a need to know basis.
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	Excel spreadsheet.

PERT Excel Template

Inputs (do not alter):	2	4	6		Key:	Critical Path

	Work Package #	Work Package name	Name of estimator	Estimate Type	Optimistic estimate (in days or $)	Most Likely or Expected (in days or $)	Pessimistic Estimate (in days or $)	PERT estimate	Activity Std Dev	Activity Std Dev squared (for Z calculation)	Reviewed and Approved by
					a	m	b	t_e	σt_e	σt_e^2	
Example A	1.1.3.1	order parts	Joe Q. Worker	**Duration**	2	4	8	4.33	1.00	1.00	Bryce Hanson
				Cost	2000	5000	10000	5333.33	1333.33	1777777.78	
Example B	1.1.4	order parts	Joe Q. Worker	**Duration**	5	6	10	6.50	0.83	0.69	Bryce Hanson
				Cost	500	1500	2000	1416.67	250.00	62500.00	
Example C	1.2	order parts	Joe Q. Worker	**Duration**	3	5	8	5.17	0.83	0.69	Bryce Hanson
				Cost	1000	1100	1500	1150.00	83.33	6944.44	

	Critical path Expectedd uration/ex pected budget	Critical path PERT Project duration/b udget	Sum of σte^2		Probability of completing the project within schedule/ budget
	T_S	T_E	σT_E	Z	P
Project Schedule	9	9.50	2.39	-0.209	0.41710612
Project Budget	6100	6483.33	1847222.22	0.000	0.49991721

PERT (Program Evaluation Review Technique) Formulas

The weighted average activity time is computed by using the following formula:

$$t_e = \frac{a + 4m + b}{6}$$

where $t_e =$ weighted average activity time

$a =$ optimistic activity time (1 chance in 100 of completing the activity earlier under *normal* conditions)

$b =$ pessimistic activity time (1 chance in 100 of completing the activity later under *normal* conditions)

$m =$ most likely activity time

The variability in the activity time estimates can be aproximated with the following equations:

Standard deviation for the activity:

$$\sigma_{t_e} = \left(\frac{b - a}{6}\right)$$

Standard deviation for the project (note that the standard deviation of the activity is squared. This is called variance) This sum only includes activities on the *critical path(s)* being reviewed.

$$\sigma_{T_E} = \sqrt{\sum {\sigma_{t_e}}^2}$$

$T_E =$ the sum of all $t_e$values along the critical path (follows a normal distribution

Where $T_S =$ critical path duration

$T_E =$ scheduled project duration

$Z =$ probability of meeting scheduled duration found in statistical table. (aka, use the Z value to look up the p value on a stats table)

Template Notes: Risk Assessment

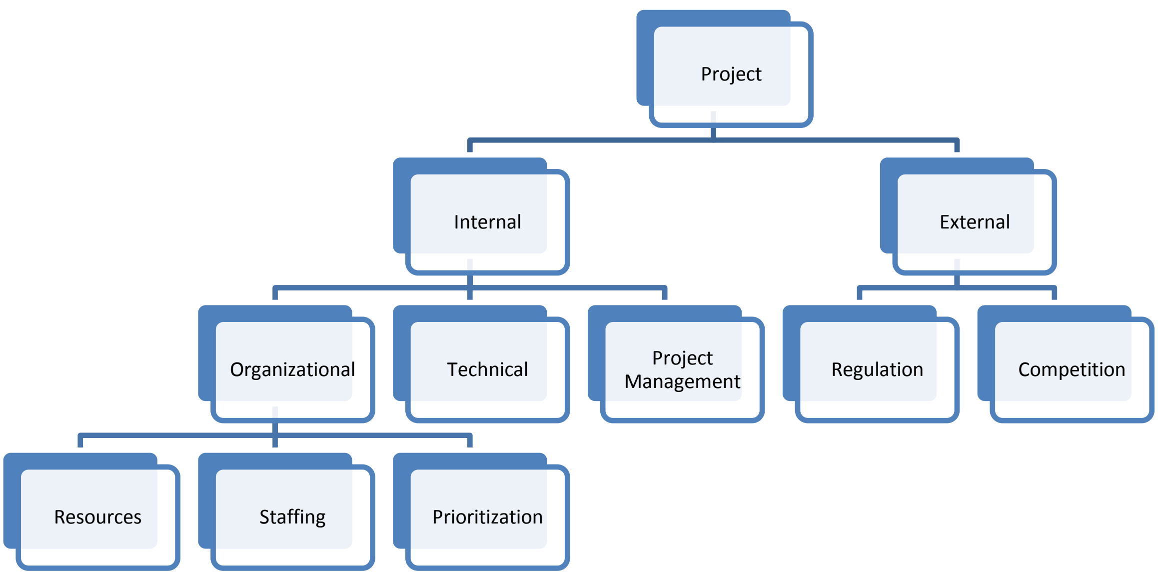
What is the context of the template? (Where does it fit in the Project Life Cycle?)	Towards the end of the Planning Stage of the Project. By this time the project should be well defined with a functional schedule.
Why is the template important? (What need does it fill and why? What is the purpose?)	Change happens, and planning is important. Projects need to determine potential risk to properly plan for them.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	Prevents being unprepared for problems as they arise. Prevents panic.
From whom is the information in the template gathered from? (Where do we get the information?)	SMEs. Bottom up, using a survey method is best.
To whom is the information in the template provided? (Who is the intended audience and why?)	Project Manager analyzes and distributes to people responsible for work packages
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	Survey form from bottom up, then created into a chart or matrix for distribution.

Risk Assessment Template

This template is to be used towards the end of the planning stage of a project. It is used to identify and plan for the risks associated with project success. Identifying and planning for the mitigation of possible risks reduces confusion and keeps extra cost and effort to a minimum. Information pertinent to this template is gathered from subject matter experts within the project, organized into a Risk Response chart by the PM and then distributed among the project team.

Risk Identification

The Project Manager (PM) should seek to establish a catalogue of possible risks to a project with the help of subject matter experts (SMEs) within the project. The PM should either solicit responses via correspondence, conduct a brainstorming group session, or both to gather a list of possible risks. The list of risks can then be organized into a Risk Breakdown Structure. An example follows:



As time allows, the PM should work through several iterations of risk assessment with the SMEs to build a robust catalogue of project risks. A survey is a useful tool to solicit responses from project members. Below is an example of a useful survey question.

1. Design specifications:
    a. How likely do you think that the design specifications will have to be reworked? Choose an item.
    b. If the design specifications will have to be reworked, what will be the impact on the project? Choose an item.
    c. How difficult will it be to detect whether this risk will occur? Choose an item.
    d. If this risk occurs, when will it likely happen in the project? Click here to enter text.

All project risks within the risk breakdown structure should be addressed with the survey and the results should be charted in a Risk Severity Matrix. An example follows with the response to the previous question charted:

	5					
	4					
Likelyhood	**3**		Redesign of product specifications			
	2					
	1					
		1	**2**	**3**	**4**	**5**
				Impact		

KEY:	Minor Risk	Moderate risk	Major risk

With all of this information in hand, the PM can proceed to make the Risk Response Chart. This Chart will be addressed in a separate template.

PERT

If the PERT formula was used to create a bottom-up estimate for the project, schedule and budget risks can be assessed statistically. Use the expected and PERT estimates of the critical path to calculate the probability of completing the project on time or on budget.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Inputs (do not alter):	2	4	6		Key:	Critical Path					
2												
3		**Work Package #**	**Work Package name**	**Name of estimator**	**Estimate Type**	**Optimistic estimate (in days or $)**	**Most Likely or Expected (in days or $)**	**Pessimistic Estimate (in days or $)**	**PERT estimate**	**Activity Std Dev**	**Activity Std Dev squared (for Z calculation**	**Reviewed and Approved by**
4						a	m	b	t_e	σt_e	σt_e^2	
5	**Example A**	1.1.3.1	order parts	Joe Q. Worker	**Duration**	2	4	8	4.33	1.00	1.00	Bryce Hanson
6					**Cost**	2000	5000	10000	5333.33	1333.33	1777777.78	
7	**Example B**	1.1.4	order parts	Joe Q. Worker	**Duration**	5	6	10	6.50	0.83	0.69	Bryce Hanson
8					**Cost**	500	1500	2000	1416.67	250.00	62500.00	
9	**Example C**	1.2	order parts	Joe Q. Worker	**Duration**	3	5	8	5.17	0.83	0.69	Bryce Hanson
10					**Cost**	1000	1100	1500	1150.00	83.33	6944.44	
11												
12												
13												
14			Critical path Expected duration/ expected budget	Critical path PERT Project duration/ budget	Sum of σte^2		Probability of completing the project within schedule/ budget					
15			T_S	T_E	σT_E	Z	P					
16	Project Schedule		9	9.50	2.39	-0.209	0.41710612					
17	Project Budget		6100	6483.33	1847222.22	0.000	0.49991721					

Template Notes: Change Control Plan

What is the context of the template? (Where does it fit in the Project Life Cycle?)	Any time during the execution of the Project.
Why is the template important? (What need does it fill and why? What is the purpose?)	Most project schedules and budgets will change at some point. The change control plan allows the process of making changes to be controlled and documented.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	Keeps project team members from making changes to the project without approval. Controls scope creep or unnecessary "gold plating".
From whom is the information in the template gathered from? (Where do we get the information?)	The change request form is filled out by the person requesting the change. Whoever has authority to do so approves the change and signs the form. Then the project manager fills in the change control log.
To whom is the information in the template provided? (Who is the intended audience and why?)	The project manager maintains and references the project control log. The change control log can be used at the end of the project when assessing the effectiveness of the project.
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	Create the change request form in a Word document. Change control log can be created in a table or in a spreadsheet.

Change Request Form

Project Name: Click here to enter project.

Date Received: Click here to enter a date.

Change Request #: Click here to enter number.

Requester information

Name: Click here to enter name.

Department: Choose an item.

Email: Click here to enter email.

Phone: Click here to enter Number

Change Information

Description of Change Request

Click here to enter text.

Reason for Change (Issues, Benefits, etc.)

Click here to enter text.

Priority:

Choose an item.

Impact Assessment

Project aspects impacted	*Impacts*
Stakeholders	
Deliverables	
Work Tasks	
Schedule	
Effort	
Cost	

Status Information

This section is to be filled out by the project manager

Status

Choose an item.

Assigned To

Click here to enter text.

Assigned Date

Click here to enter a date.

Decision

Click here to enter text.

Decision Date

Click here to enter a date.

Target Implementation Date

Click here to enter a date.

Project Change Request Form / Signatures

Project Name:

Project Manager:

I have reviewed the information contained in this Project Change Request Form and agree:

Name	*Title*	*Signature*	*Date* *(MM/DD/YYYY)*

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Change Request Form.

Change Control Log

Any project will go through changes, it is important to document, evaluate, and gain approval for all changes to the project.

When using the change control log, remember to:

- Have all appropriate stakeholders be involved in the evaluation and approval process
- Thoroughly assess the impact the change has on the projects critical success factors
- Gain appropriate management level approval before any change is implemented
- Communicate all changes to all stakeholders
- Allow any stakeholder to submit a project change request.
- Most important: Use it!

Log Number	Date	Change Description	Initiated By	Importance High/Medium/Low	Approved By	Team Notification	Status
***Example:* 1**	Example: 7/31/2010	Example: Add Gold Plating to the end product.	*Example: Bryce Hanson*	*Example: High*	*Example: Dan Aronson*	*Example: Face to Face meeting*	Example: Closed

Template Notes: Lessons Learned

What is the context of the template? (Where does it fit in the Project Life Cycle?)	• Go to your change log, figure out the genius gathered from your experience. • Post project assessment • In process improvements
Why is the template important? (What need does it fill and why? What is the purpose?)	Forces you into an analysis, allows the organization to move forward more efficiently. Increases knowledge base.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	Standardizes the process. Prevents repeats of past mistakes.
From whom is the information in the template gathered from? (Where do we get the information?)	Project Team. You can also use the change log to gather information.
To whom is the information in the template provided? (Who is the intended audience and why?)	Team, and other Project Managers. Anyone affected in the future by similar processes.
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	In a word document.

Lessons Learned

Lessons learned purpose and objectives

Throughout each project, lessons are learned and opportunities for improvement are discovered. As part of a continuous improvement process, documenting lessons learned helps the project team discover the root causes of problems that occurred and avoid those problems in future projects.

The objective of this report is gathering all relevant information for better planning and implementation of future projects.

Lessons learned questions

- What worked well—or didn't work well—either for this project or for the project team?
- What needs to be done differently?
- What surprises did the team have to deal with?
- What project circumstances were not anticipated?
- Were the project goals attained? If not, what changes need to be made to meet goals in the future?

Top 3 Significant Project Successes

Project Success	Factors That Supported Success

Other Notable Project Successes

Project Success	Factors That Supported Success

Project Shortcomings and Solutions

Project Shortcoming	Recommended Solutions

Template Notes: Audit Checklist

What is the context of the template? (Where does it fit in the Project Life Cycle?)	• If something is not going well • Quality check/High risk • Post project
Why is the template important? (What need does it fill and why? What is the purpose?)	Detect issues/flaws in planning or execution. Ability to learn from the project and develop best practices. Increase knowledge base. Verify records.
What problem does the template solve? (Decision making, information gathering, planning, communication, etc? Ramifications if it is not done?)	It can keep you on track, or get you directed back on track. Saves time. Work smarter not harder.
From whom is the information in the template gathered from? (Where do we get the information?)	From the organization and from the project team. Best interest of the organization vs. project progress etc... Interviews and surveys.
To whom is the information in the template provided? (Who is the intended audience and why?)	Report to managers and executives Let the team know what they need to fix
What is the best format to gather and communicate the information? (How can we be efficient in doing this?)	Surveys to gather Communicate in a nicely worded report.

Project Audit Checklist

The following is a template for a project audit checklist. Only a few items are filled in to serve as an example. Items to consider when developing a complete audit checklist would include:

Organization View

- ✓ Was the organizational culture supportive and correct?
- ✓ Was senior management's support adequate?
- ✓ Did the project accomplish its intended purpose?
- ✓ Were risks appropriately identified and assessed?
- ✓ Were the right people and talents assigned?
- ✓ Have staff been fairly reassigned to new projects?
- ✓ What does evaluation from contractors suggest?
- ✓ Were the project start-up and hand-off successful?
- ✓ ***Is the customer satisfied?***

Project Team View

- ✓ Were the project planning and control systems appropriate for this type of project?
- ✓ Should all similar projects use these systems?
- ✓ Did the project conform to plan for budget and schedule?
- ✓ Were interfaces with stakeholders effective?
- ✓ Have staff been fairly assigned to new projects?
- ✓ Did the team have adequate resources?
- ✓ Were there resource conflicts?
- ✓ Was the team managed well?
- ✓ What does evaluation from contractors suggest?

This form is to assist the Project manager with reviewing the health of a project:

Relevance (at this time)

(How relevant is this attribute to this project or audit?)

1 — 3 — 5

Little / none — Moderate — Critical

Theory & Practice

(An indication of this attribute's strength or weakness)

1 — 3 — 5

Not addressed — Adequate — Well covered

Item	Attribute	Relevance	Practice	Assessment
1	**Project Planning**			
1.1	Does the project have a formal Project Plan?			
1.2	Are the key elements of a Project Plan present? a. Project Definition & Scope? b. Project Objectives? c. Cost / Benefit Analysis? d. Staffing Requirements? e. Time Line? f. Risk Analysis? g. Critical Success Criteria (if we meet these, we've met our goals?			
2	**Project Management**			
2.1	Have the key elements of a coherent project management strategy been established? a. Project tracking plan & methodology b. Project status reporting structure & process c. Change Management plan & tracking d. Issues Management process & tracking plan e. Risk Management Plan f. Software Quality Assurance g. Software Configuration Management			
2.2	**Project Scheduling & Tracking**			
2.2.1	Has a structured approach been used to break work effort into manageable components?			
2.2.2	Are team members involved in the development of activity & task decomposition?			

3	**Quality Management**			
3.1	Does the project have a 'Quality Culture'?			
3.2	Is there a Quality Plan covering all Policies, Guidelines and Procedures?			
3.3	**Quality Assurance**			
3.3.1	Has an overall Quality Assurance Plan been developed for the project?			
3.3.2	Does the plan address key project elements? a. Project Planning? b. Project Management?			