**[Insert Project Name]**

**Project Planning Document**

**Medium or Large Project**

Further description if needed

***Please note:*** *all text highlighted in grey has been developed to assist you in preparing your Project Planning Document. Please delete this text once you understand the requirements.*

Document Control

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| **Version** | **Date** | **Author** | **Amendment** | **Distribution** |
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Document Approval

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**Supported by:**

**……………………………………………………………………..** Date: **……………………**

(INSERT Business Owner name / title)

**Approved by:**

**……………………………………………………………………..** Date: **……………………**

(INSERT Project Sponsor name / title)

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1. Purpose

*The Project Plan document defines the project to form the basis for its management and assessment of its overall success. This will be used to gain approval to proceed with the project and used as the basis against which performance will later be assessed.*

*[You can use* [*StrategyDotZero*](https://anu.strategydotzero.com/Account/Login) *as an alternative to this template.]*

1. Project Definition

*You can extract most of this information from the Project Brief prepared in the Initiate stage of your project.*

* 1. Background

*Provide a brief outline of any background to the project i.e. rationale/drivers for the project, who commissioned the project and where does it fit within the wider picture?*

* 1. Project Objectives

*What specific outcomes will be achieved, and how will you measure these outcomes?*

*Tip: The project objectives should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART).*

***Specific:*** *Who is involved?*

*What do we want to accomplish?*

*Where – identify a location*

*When – establish a timeframe*

*Which – identify requirements and constraints*

*Why – specific reasons, purpose or benefits of accomplishing the objective.*

***Measurable: Establish concrete criteria for measuring progress toward each objective***

***Agreed: It is crucial measurable objectives are agreed between stakeholders.***

***Realistic: Make it realistic. Do you have the right resources and funding? Is it achievable?***

***Time based: Allocate a time frame. By when are you going to achieve the objective?***

* 1. **Scope**

*What are the boundaries for this project (for example, type of work, type of client, type of problem, geographic area covered)? The more specific you are, the less opportunity there is for confusion at a later stage in the project. List any areas excluded that you believe stakeholders might assume are included, but are not as Out of scope.*

|  |  |
| --- | --- |
| **Stage 1 – In scope** | **Out of scope** |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Stage 2 – In scope** | **Out of scope** |
|  |  |
|  |  |

* 1. **Constraints**

*What things must you take into consideration that will influence your deliverables and schedule? Are there any constraints in terms of resources, time, quality and cost?*

* 1. Assumptions

*What is assumed for the project to be successful?*

* 1. Dependencies

*Are there any dependencies that could impact on successful delivery/outcomes for your project? For example, a component of your project may not be able to start until another project is completed. These can be internal or external.*

* 1. Key Stakeholder Groups

Stakeholder Impact: C = Critical ; E = Essential ; IP = Interested Party

| **Stakeholders** | **Impact** | **Comment on stakeholder impact** |
| --- | --- | --- |
| *Office of the Vice Chancellor, including Executive Director Administration and Planning* | *E* | *Required to approve* |
| *College Deans and General Managers and Service Division Directors* | *IP* | *Required to have input and overview of the project* |
|  |  |  |
|  |  |  |

1. Business Case

Refer to the Business Case *(see template). Update the Business Case as required.*

1. Governance

*What structure for over sighting the project will be put in place?*

|  |  |  |
| --- | --- | --- |
| ☐ Project Board/Steering Committee | ☐ Reference Group | ☐ Working Groups |

*Provide reasoning for the above decision.*

1. Project Organisational Structure

*Insert a chart or table that describes the organisation of the project governance structure.*

1. Team Structure and Roles

*You can extract and expand on this from the Project Brief in the Start Up stage. You need to be clear about staff roles so that you don't duplicate responsibilities, and so that everyone is clear about what's expected of them. You will need to document who will be on the project and their responsibilities.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Responsibility** | **Name / position** | **Contact details** |
|  |  |  |  |
|  |  |  |  |

1. Quality Expectations and Acceptance

*You can extract and expand on this from your Project Brief*

|  |  |
| --- | --- |
| **Expectation** | **Acceptance Criteria** |
| *Provide a brief statement about the quality expected from the people who will benefit from the end results.* | *Provide a list of criteria that the project must meet for the customer/stakeholders to accept it. Use the SMART method to assist in defining so it is measurable and realistic.* |
|  |  |

* 1. Applicable Standards

*What will be the standard to which the deliverables need to be adhered to? This could be an Australian Standard, international standard or internal ANU Methodologies or framework.*

1. Project Success Measures

*<This section can be copied from the updated business case>*

*List defined project outcomes and corresponding success criteria. To achieve a successful project it is imperative to understand the business drivers and ensure the project delivers the business results for which it was designed. Key Performance Indicators (KPIs) are a common term for criteria used to measure the benefits of a project. These indicators are:*

* *Established by the customer and stakeholders at the beginning of the project and listed in order of priority*
* *Directly related to and supported by business goals*
* *Able to provide the basis for critical decision-making throughout the project*
* *The basis on which the product will be accepted by the customer at the end of the project*
* *Measurable*

|  |  |  |
| --- | --- | --- |
| **Key Performance Indicator (KPI)** | **Project Outcomes** | **Success Criteria** |
| e.g. Reduce operating costs by 10% by consolidating resources into one centralised location | *e.g. Move 25 resources from Location A to Location B* | *e.g.*  *- Move completed by end of Q4*  *- Location A vacated and lease cancelled by Nov 30.*  *- No customer downtime during core business hours M-F 8am to 5pm (AEST)* |
|  |  |  |
|  |  |  |

1. Benefits Measurement Plan

*The Benefits Measurement Plan is used to define the benefits of the project and the work and responsibilities for benefits realisation, measurement and reporting. This includes high level information about the proposed types of benefits applicable for the key outcomes and where possible, it will also include detailed metrics, including targets, baselines and timelines for the benefits to be measured.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity/Process** | **Deliverable/Output** | **Outcome** | **Benefit** | **Responsible Person** | **Measure** |
| *Description of the activity or process to be undertaken, ie develop new booking system* | *Describe what is produced by the activity, ie in-house booking system* | *Describes the utility or feature of the deliverable, ie facilitates realt-ime booking of university rooms and venues* | *It is the value or advantage of producing the deliverable*  *ie Reduces the effort and timeframe needed to book a venue* | *The person/position responsible for benefit realisation* | *How it will be measured. How will we know this is successful?*  *ie Customer Satisfaction survey. This can be sourced from Success Criteria above* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. Procurement Management

Refer to the ANU Procurement Policy and Procedures.

1. Risk Management Plan

Refer to the Risk Register (see template)

1. Communication Management Plan

Refer to the Communications Plan (see template)

1. Change Management

*This section can be included if the project is likely to lead to one or more of the following;*

* *Relocation of work area;*
* *Elimination of positions;*
* *Change to hours of operation;*
* *Introduction of significant technological change; or*

*A significant change to work practices or impact on conditions, including change that would be likely to lead to changed responsibility levels*

*Where Change Management is required, organisational changes occurring as part of the project should be conducted in accordance with the* [ANU Enterprise Agreement](http://hr.anu.edu.au/employment-at-anu/enterprise-agreement) *(Section 68) and the* [ANU Organisational Arrangements Change Procedure](https://policies.anu.edu.au/ppl/document/ANUP_000812).

*This section should describe the planned change management activities that will need to take place as part of the project.*

1. Reporting Plan

*Details of reporting approaches to be used on the project*

| **Type** | **Audience** | **Trigger** |
| --- | --- | --- |
| *e.g. Status Report, Highlight Report, Checkpoint* | *e.g. Steering Committee, Client* | *e.g. SC Meetings, Major Event* |

1. Issues Register

Refer to the Issues Register (see template)

1. Project plan
   1. Work Breakdown Structure

*Provide a high level overview of the project effort. The Work Breakdown Structure will assist in developing the Project Schedule. This can be mapped in a simple structural diagram such as the one below (using MS Word Smart Art Org Chart tools).*

*Example: Work Breakdown Structure for a “Conference”*

* 1. Schedule

*Insert a high level Gantt chart incorporating critical path and key milestones. This is a high level schedule for project activities.*

*OR use StrategyDotZero.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **ID** | **Activity** | **Description** | **Who** | **Scheduled start** | **Scheduled Finish** | **Predecessor** |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  | e.g. 1 |
| 3 |  |  |  |  |  | e.g. 2 |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

* Activities in the Predecessor column must be completed prior to this activity commencing

16.4 Monitor and Controls

Detail what controls you will use to track progress and report to the defined governance group.

| **Control** | **Frequency** | **Responsibility** |
| --- | --- | --- |
| Seek governance approval on the tolerances for the project scope, budget, schedule and quality. |  |  |
| Track the project against the success criteria, tolerance levels for budget, scope, schedule and quality. |  |  |
| Update and submit Project Status Reports to Project Board/Steering Committee |  |  |
| Update and submit updated issue/risk register to Project Board/Steering Committee |  |  |
| Update and submit Lessons log to Project Board/Steering Committee |  |  |
|  |  |  |

* 1. Variation Process

Outline the process that will be taken in the event that the project needs a variation request. What constitutes a variation that exceeds tolerance levels and needs to be approved? Who is responsible for developing the variation request? Who is authorised to approve the Project variation?

1. Budget

*Breakdown of the elements considered when estimating the budget. Use the Budget Management Template to estimate and document project costs.*

*Please see the attached Budget Management Template that provides a detailed cost estimate for the project. This Budget Management Template should accompany the Project Planning Document for approval.*

*A summary of project costs (including ongoing operations and maintenance costs) and where they will be funded from is provided in the table below.*

* 1. Project

| **Type** | **Cost** | **Funding Source** | **Approved By** |
| --- | --- | --- | --- |
| External |  |  |  |
| Proposing Area |  |  |  |
| Impacted Area(s) |  |  |  |
| **Total** |  |  |  |
| **Comments:** | | | |

* 1. Ongoing

| **Type** | **Cost per Annum** | **Funding Source** | **Approved By** |
| --- | --- | --- | --- |
| Staff |  |  |  |
| Licensing |  |  |  |
| Maintenance |  |  |  |
| **Total** |  |  |  |
| **Comments:** | | | |