



Treasury Board of Canada  
Secretariat

Secrétariat du Conseil du Trésor  
du Canada

# **Enhanced Management Framework for Information Management/Information Technology**

## **PROJECT PLAN TEMPLATE**

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**Chief Information Officer Branch  
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**Canada**

# Project Plan Template Overview

## What is a Project Plan?

The project plan is the controlling document to manage an Information Management/Information Technology (IM/IT) project. The project plan describes the:

- Interim and final deliverables the project will deliver,
- Managerial and technical processes necessary to develop the project deliverables,
- Resources required to deliver the project deliverables, and
- Additional plans required to support the project.

## Why create a Project Plan?

Documenting the decisions is essential. As you record, gaps appear and inconsistencies protrude. Creating the project plan usually requires hundreds of mini-decisions and these bring clarity to the project.

The project plan communicates the decisions to others. Often what we assume is common knowledge is unknown by other members of the team. Fundamentally, the project manager's goal is to keep everyone progressing in the same direction and communication is essential to achieve this goal. The project plan makes communicating a lot easier.

The project plan is a wealth of information as well as a checklist. By reviewing the project plan, as often as is required, the project manager knows where the project is to identify what correction action or changes of emphasis or shifts in direction are needed.

80% of a project manager's time is spent on communication: hearing, reporting, teaching, counselling, and encouraging. The other 20% is spent on activities where the project manager needs information that is data-based. The project plan is a critical set of documents that should meet this need.

The job of the project manager is to develop a project plan and to accomplish it. Only the written project plan is precise and communicable. The project plan consists of documents on who, what, why, when, where, how and how much. The project plan encapsulates much of the project manager's work. If their comprehensive and critical nature is recognized in the beginning, the manager can approach them as friendly tools rather than annoying overhead. The project managers can set the direction much more crisply and quickly by doing so.<sup>1</sup>

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<sup>1</sup> Brooks, P., *The Mythical Man Month Anniversary Edition*, Reading, Mass.: Addison-Wesley, 1995.

## **Is the Project Plan Applicable to all IM/IT Projects?**

The project plan is applicable to all types of IM/IT projects regardless of size, complexity or criticality. Not all projects are concerned with developing source code for a new software product. Projects can cover

- Business cases,
- Feasibility studies and the definition of IM/IT requirements,
- Specific phases of an IM/IT product life cycle,
- Major modifications to existing software products, and
- Upgrades to technical infrastructure.

Smaller projects may require less formality than larger projects, but all components of the project plan should be addressed by every IM/IT project.

## **Who is responsible for the Project Plan?**

The individual or organization responsible for the IM/IT project will be responsible for the project plan.

## **Evolution of Project Plans**

One of the first activities to be completed in a project is the initial version of the project plan. Over time, as the inputs to the project are better understood, the plans will become more detailed. Each version of the project plan should be placed under configuration management, and each version should contain a schedule for subsequent updates to the project plan.

## **What is the Project Plan Template?**

The project plan template presents the format and content of an IM/IT project plan. The ordering of the sections is not meant to imply the order to develop the sections. The order is meant for ease of reading, presentation, and use, and not as a guide to the order of preparation of the various section.

This template is based on the IEEE Std 1058-1998, IEEE Standard for Software Project Management Plans.

The text within each section is for the benefit of the person writing the project plan and should be removed before the project plan is completed.

The template is for project managers and other individuals who prepare and update project plans and track adherence to those plans.

## Tailoring the Project Plan Template

Incorporate additional elements by inserting or appending sections by direct incorporation or by reference to other documents.

Organizations can develop generic project plans so that projects can reuse sections that are common across the organization such as organization charts, roles and responsibilities, supporting processes, and infrastructure allowing projects to focus on project-unique elements such as requirements, schedule, budget, etc.

## References

PPTO-PS-001          Project Management Process

PPTO-PS-002          Project Planning Process

PPTO-PS-003          Project Tracking and Oversight Process

IEEE Std 1058-1998, IEEE Standard for Software Project Management Plans.

Watts S. Humphrey. *Managing the Software Process*. Addison-Wesley, Reading, Mass., 1989.

## Contributors

The Project Planning, Tracking, and Oversight (PPTO) Working Group of the Enhanced Management Framework (EMF) of the Chief Information Officer Branch (CIOB) of the Treasury Board of Canada Secretariat (TBS) developed this document.

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## Document Change Control

<b>Revision Number</b>	<b>Date of Issue</b>	<b>Author(s)</b>	<b>Brief Description of Change</b>
0.1	1999-07-23	EMF-PPTO	Initial Draft
0.2	1999-07-30	EMF-PPTO	Updates from first level review.
0.3	1999-08-09	TBS Client Services	Updates to comply with TBS Document/Web standards
0.4	1999-08-12	EMF-PPTO	Updates from PPTO Working Group review.
1.0	1999-11-10	EMF-PPTO	First Draft

**PROJECT PLAN TEMPLATE**

**< INSERT ISSUING ORGANIZATION >**

**< INSERT PROJECT NAME >**

**Document Revision #:**

**Date of Issue:**

**Project Manager:**

## Approval Signatures

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Approved by: Business Project Leader

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Prepared by: Business Project Manager

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Prepared by: IM/IT Project Manager

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## Document Change Control

This section provides control for the development and distribution of revisions to the Project Charter up to the point of approval. The Project Charter does not change throughout the project life cycle, but rather is developed at the beginning of the project (immediately following project initiation approval, and in the earliest stages of project planning). The Project Charter provides an ongoing reference for all project stakeholders. The table below includes the revision number (defined within your Documentation Plan Outline), the date of update/issue, the author responsible for the changes, and a brief description of the context and/or scope of the changes in that revision.

Revision Number	Date of Issue	Author(s)	Brief Description of Change

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## 1. Project Overview

This section of the IM/IT Project Management Plan provides an overview of the purpose, scope and objectives of the project for which the Plan has been written, the project assumptions and constraints, a list of project deliverables, a summary of the project schedule and budget, and the plan for evolving the IM/IT Project Management Plan.

### 1.1 Purpose, Scope, and Objectives

- Define the purpose and scope of the project.
- Describe any considerations of scope or objectives to be excluded from the project or the deliverables.
- Ensure that the statement of scope is consistent with similar statements in the business case, the project charter and any other relevant system-level or business-level documents.
- Identify and describe the business or system needs to be satisfied by the project.
- Provide a concise summary of:
  - the project objectives,
  - the deliverables required to satisfy the project objectives, and
  - the methods by which satisfaction of the objectives will be determined.
- Describe the relationship of this project to other projects.
- If appropriate, describe how this project will be integrated with other projects or ongoing work processes.
- Provide a reference to the official statement of project requirements (e.g.: in the business case or the project charter).

### 1.2 Assumptions, Constraints and Risks

- Describe the assumptions on which the project is based.
- Describe the imposed constraints and risks on the project such as:
  - schedule,
  - budget,
  - resources,
  - quality,
  - software to be reused,
  - existing software to be incorporated,
  - technology to be used, and
  - external interfaces.

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### 1.3 Project Deliverables

- Identify and list the following, as required to satisfy the terms of the project charter or contract:
  - project deliverables (either directly in this Plan, or by reference to an external document),
  - delivery dates,
  - delivery location, and
  - quantities required.
- Specify the delivery media.
- Specify any special instructions for packaging and handling.

### 1.4 Schedule and Budget Summary

- Provide a summary of the schedule and budget for the IM/IT project.
- Restrict the level of detail to an itemization of the major work activities and supporting processes (e.g.: give only the top level of the work breakdown structure).

### 1.5 Evolution of the Plan

- Identify the compliance of this Plan to any standards.

The structure of this Project Plan is in compliance with the recommendations of IEEE Std 1058-1998.

- Specify the plans for producing both scheduled and unscheduled updates to this Plan.
- Specify how the updates to this Plan shall be disseminated.
- Specify how the initial version of this Plan shall be placed under configuration management.
- Specify how changes to this Plan shall be controlled after its issue.

### 1.6 References

- Provide a complete list of all documents and other sources of information referenced in this Plan.
- Identify each referenced document by title, report number, date, author and publishing organization.
- Identify other referenced sources of information, such as electronic files, using unique identifiers such as path/name, date and version number.
- Identify and justify any deviations from the referenced standards or policies.

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## 1.7 Definitions and Acronyms

- Define, or provide references to documents or annexes containing the definition of all terms and acronyms required to properly understand this Plan.

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## 2. Project Organization

### 2.1 External Interfaces

- Describe the organizational boundaries between the project and external entities.
- Identify, as applicable:
  - the parent organization,
  - the customer,
  - subcontracted organizations, and
  - other organizational entities that interact with the project.
- Use organizational charts or diagrams to depict the project's external interfaces.

### 2.2 Internal Structure

- Describe the internal structure of the project organization.
- Describe the interfaces among the units of the IM/IT development team.
- Describe the interfaces between the project and organizational entities that provide supporting processes, such as configuration management, quality assurance, and verification and validation.
- Use organizational charts or diagrams to depict the lines of authority, responsibility and communication within the project.

### 2.3 Roles and Responsibilities

- Identify and state the nature of each major work activity and supporting process.
- Identify the organizational units that are responsible for those processes and activities.
- Consider using a matrix of work activities and supporting processes vs. organizational units to depict project roles and responsibilities.

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### 3. Managerial Process Plans

This section of the IM/IT Project Management Plan specifies the project management processes for the project. This section defines the plans for project start-up, risk management, project work, project tracking and project close-out.

#### 3.1 Start-up Plan

##### 3.1.1 *Estimates*

- Specify the estimated cost, schedule and resource requirements for conducting the project, and specify the associated confidence levels for each estimate.
- Specify the methods, tools and techniques used to estimate project cost, schedule and resource requirements;
- Specify the sources of estimate data and the basis of the estimation such as: analogy, rule of thumb, standard unit of size, cost model, historical database, etc.
- Specify the methods, tools, techniques to be used to re-estimate the project cost, schedule and required resources.
- Specify the schedule for re-estimation, which might be regular, a periodic or event-driven (e.g.: on project milestones).

##### 3.1.2 *Staffing*

- Specify the number of required staff, providing the following details:
  - number of personnel by skill level,
  - numbers and skill levels in each project phase, and
  - duration of personnel requirement.
- Specify the sources of staff personnel (e.g.: internal transfer, new hire, contracted, etc.)
- Consider using resource Gantt charts, resource histograms, spreadsheets and tables to depict the staffing plan by skill level, by project phase, and by aggregations of skill levels and project phases.

##### 3.1.3 *Resource Acquisition*

- Specify the plan for acquiring the resources and assets, in addition to personnel, needed to successfully complete the project.
- Describe the resource acquisition process.
- Specify the assignment of responsibility for all aspects of resource acquisition.

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- Specify acquisition plans for equipment, computer hardware and software, training, service contracts, transportation, facilities, and administrative and janitorial services.
- Specify when in the project schedule the various acquisition activities will be required.
- Specify any constraints on acquiring the necessary resources.
- If necessary, expand this subsection to lower levels, to accommodate acquisition plans for various types of resources.

#### **3.1.4 Project Staff Training**

- Specify the training needed to ensure that necessary skill levels in sufficient numbers are available to successfully conduct the IM/IT project.
- Specify the following training information:
  - the types of training to be provided,
  - numbers of personnel to be trained,
  - entry and exit criteria for training, and
  - the training method, for example: lectures, consultations, mentoring, computer-assisted training, etc.
- Identify training as needed in technical, managerial and supporting activity skills.

### **3.2 Work Plan**

#### **3.2.1 Work Breakdown Structure**

- Define a Work Breakdown Structure (WBS) to specify the various work activities to be performed in the IM/IT project, and to depict the relationships among these work activities.
- Decompose the work activities to a level that exposes all project risk factors, and that allows accurate estimation of resource requirements and schedule duration for each work activity.
- Specify the following factors for each work activity:
  - necessary resources,
  - estimated duration,
  - products or deliverables of the activity,
  - acceptance criteria for the work activity products, and
  - predecessor and successor work activities.
- The level of decomposition internally within the WBS may vary depending on the quality of the requirements, familiarity of the work, applicable level of technology, etc.

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### 3.2.2 *Schedule Allocation*

- Specify the scheduling relationships among the project work activities in a manner that depicts the time-sequencing constraints and illustrates opportunities for concurrent work activities.
- Identify the critical path in the schedule.
- Indicate any constraints on the scheduling of particular work activities, that are caused by external factors.
- Identify appropriate schedule milestones to assess the scope and quality of project work products and of project achievement status.
- Techniques for depicting schedule relationships may include milestone charts, activity lists, activity Gantt charts, activity networks, critical path networks and PERT charts.

### 3.2.3 *Resource Allocation*

- Provide a detailed itemization of the resources allocated to each major work activity in the project WBS.
- Specify the numbers and required skill levels of personnel for each work activity.
- Specify, as appropriate, the allocation of the following resources:
  - personnel (by skill level),
  - computing resources
  - software tools
  - special testing and simulation facilities, and
  - administrative support.
- Use a separate line item for each type of resource for each work activity.

### 3.2.4 *Budget Allocation*

- Provide a detailed breakdown of the necessary resource budgets for each of the major work activities in the WBS.
- Specify the estimated cost for activity personnel, and include as appropriate, the costs for the following items:
  - travel,
  - meetings,
  - computing resources,
  - software tools,
  - special testing and simulation facilities, and
  - administrative support.

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- Use a separate line item for each type of resource in each activity budget.

### 3.3 Project Tracking Plan

#### 3.3.1 *Requirements Management*

- Specify the process for measuring, reporting and controlling changes to the project requirements.
- Specify the processes to be used in assessing the impact of requirements changes on product scope and quality, and the impacts of requirements changes on project schedule, budget, resources and risk factors.
- In the configuration management processes, specify change control procedures and the formation and use of a change control board.
- In the processes for requirements management, include traceability, prototyping and modeling, impact analysis and reviews.

#### 3.3.2 *Schedule Control*

- Specify the schedule control activities by identifying the processes to be used for the following purposes:
  - to measure the progress of work completed at the major and minor project milestones,
  - to compare actual progress to planned progress, and
  - to implement corrective action when actual progress does not conform to planned progress.
- Specify the methods and tools that will be used to measure and control schedule progress.
- Identify the objective criteria that will be used to measure the scope and quality of work completed at each milestone, and hence to assess the achievement of each schedule milestone.

#### 3.3.3 *Budget Control*

- Specify the budget control activities by identifying the processes to be used for the following purposes:
  - to measure the cost of work completed,
  - to compare the actual cost to the planned and budgeted costs, and
  - to implement corrective action when the actual cost does not conform to the budgeted cost.
- Specify when cost reporting will be done in the project schedule.

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- Specify the methods and tools that will be used to track the project cost.
- Identify the schedule milestones and objective indicators that will be used to assess the scope and quality of the work completed at those milestones.
- Specify the use of a mechanism such as earned value tracking to report the budget and schedule plan, schedule progress, and the cost of work completed.

#### **3.3.4 *Quality Control***

- Specify the processes to be used to measure and control the quality of the work and the resulting work products.
- Specify the use of quality control processes such as quality assurance of conformance to work processes, verification and validation, joint reviews, audits and process assessment.

#### **3.3.5 *Reporting***

- Specify the reporting mechanisms, report formats and information flows to be used in communicating the status of requirements, schedule, budget, quality, and other desired or required status metrics within the project and to entities external to the project.
- Specify the methods, tools and techniques of communication.
- Specify a frequency and detail of communications related to project management and metrics measurement that is consistent with the project scope, criticality, risk and visibility.

#### **3.3.6 *Project Metrics***

- Specify the methods, tools, and techniques to be used in collecting and retaining project metrics.
- Specify the following metrics process information:
  - identification of the metrics to be collected,
  - frequency of collection, and
  - processes for validating, analyzing, and reporting the metrics.

### **3.4 Risk Management Plan**

- Specify the risk management plan for identifying, analyzing, and prioritizing project risk factors.
- Specify plans for assessing initial risk factors and for the ongoing identification, assessment, and mitigation of risk factors throughout the life cycle of the project.
- Describe the following:

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- procedures for contingency planning,
  - procedures for tracking the various risk factors,
  - procedures for evaluating changes in the levels of the risk factors and responding to changes in the levels of the risk factors,
  - risk management work activities,
  - procedures and schedules for performing risk management work activities,
  - risk documentation and reporting requirements,
  - organizations and personnel responsible for performing specific risk management activities, and
  - procedures for communicating risks and risk status among the various customer, project and subcontractor organizations.
- Identify and describe the applicable impact of any of the following risk factors:
    - risks in the customer-project relationship,
    - contractual risks,
    - technological risks,
    - risks caused by the size and complexity of the product,
    - risks in the development and target environments,
    - risks in personnel acquisition, skill levels and retention
    - risks to schedule and budget, and
    - risks in achieving customer acceptance of the deliverables.

### 3.5 Project Closeout Plan

- Identify the plans necessary to ensure orderly closeout of the IM/IT project.
- Specify the following:
  - a staff reassignment plan
  - a process for archiving project materials,
  - a process for capturing project metrics in the business projects database,
  - a process for post-mortem debriefings of project personnel, and
  - a plan for preparation of a final report to include lessons learned and an analysis of project objectives achieved.

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## 4. Technical Process Plans

### 4.1 Process Model

- Define the relationships among major project work activities and supporting processes.
- Describe the flow of information and work products among activities and functions.
- Specify the timing of work products to be generated.
- Identify the reviews to be conducted.
- Specify the major milestones to be achieved.
- Define the baselines to be established.
- Identify the project deliverable to be completed.
- Specify the required approvals within the duration of the project.
- In the process model for the project, include project initiation and project termination activities.
- Use a combination of graphical and textual notations to describe the project process model.
- Indicate any tailoring of your organization's standard process model for a project.

### 4.2 Methods, Tools, and Techniques

- Specify the development methodologies, programming languages and other notations, and the processes, tools and techniques to be used to specify, design, build, test, integrate, document, deliver, modify and maintain the project deliverable and non-deliverable work products.
- Specify the technical standards, policies, and procedures governing development and/or modification of the work products.

### 4.3 Infrastructure

- Specify the plan for establishing and maintaining the development environment (hardware, operating system, network and software), and the policies, procedures, standards, and facilities required to conduct the IM/IT project. These resources may include workstations, local area networks, software tools for analysis, design implementations, testing, and project management, desks, office space, and provisions for physical security, administrative personnel, and janitorial services.

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#### 4.4 Product Acceptance

- Specify the plan for customer acceptance of the deliverables generated by the IM/IT project.
- Specify objective criteria for determining acceptability of the deliverables.
- Reference a formal agreement of the acceptance criteria signed by representatives of the IM/IT organization and the customer.
- Specify any technical processes, methods, or tools required for deliverable acceptance, such as testing, demonstration, analysis and inspection.

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## 5. Supporting Process Plans

### 5.1 Configuration Management

- Specify or reference the configuration management plan for the IM/IT project, providing the information identified in the following lines.
- Specify the methods that will be used to perform the following activities:
  - configuration identification,
  - configuration control,
  - status accounting,
  - evaluation, and
  - release management.
- Specify the processes of configuration management including procedures for the following activities:
  - initial baselining of work products,
  - logging and analysis of change requests,
  - change control board procedures,
  - tracking of changes in progress, and
  - procedures for notification of concerned parties when baselines are established or changed.
- Identify the automated configuration management tools used to support the configuration management process.

### 5.2 Verification and Validation

- Specify or reference the verification and validation plan for the IM/IT project, providing the information identified in the following lines.
- Specify the scope, tools, techniques and responsibilities for the verification and validation work activities.
- Specify the organizational relationships and degrees of independence between development activities and verification and validation activities.
- Specify the use of verification techniques such as traceability, milestone reviews, progress reviews, peer reviews, prototyping, simulation and modeling.
- Specify the use of validation techniques such as testing, demonstration, analysis and inspection.
- Identify the automated tools to be used in verification and validation.

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### 5.3 Documentation

- Specify the plans for generating non-deliverable and deliverable project documentation.
- Specify the organizational entities responsible for providing input information, and for generating and reviewing the project documentation.
- Specify the following information or object identification:
  - list of documents to be prepared,
  - controlling template or standard for each document,
  - who will prepare each document,
  - who will review each document,
  - due dates for review copies,
  - due dates for initial baseline versions, and
  - a distribution list for review copies and baseline versions and quantities required

### 5.4 Quality Assurance

- Specify or reference the quality assurance plan for the IM/IT project, containing the information identified in the following lines.
- Specify the plans for assuring that the IM/IT project fulfills its commitments to the IM/IT process and the IM/IT product as specified in the requirements specification, the IM/IT Project Management Plan, supporting plans and any standards, procedures, or guidelines to which the process or the product must adhere.
- As applicable, specify the quality assurance procedures to be used, such as analysis, inspection, review, audit, and assessment.
- Indicate the relationship among the quality assurance, verification and validation, review, audit, configuration management, system engineering, and assessment processes.

### 5.5 Reviews and Audits

- Specify the schedule, resources, and processes, and procedures to be used in conducting project reviews and audits.
- Specify the plans for joint customer-project reviews, management progress reviews, developer peer reviews, quality assurance audits, and customer-conducted reviews and audits.
- List the external agencies that approve or regulate any project deliverable.

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## 5.6 Problem Resolution

- Specify the resources, methods, tools, techniques and procedures to be used in reporting, analyzing, prioritizing and processing IM/IT problem reports generated during the project.
- Indicate the roles of development, configuration management, the change control board, and verification and validation in problem resolution work activities.
- Provide for separate tracking of effort expended on problem reporting, analysis and resolution, so that rework can be tracked and process improvement accomplished.

## 5.7 Subcontractor Management

- Specify or reference the plans for selecting and managing any subcontractors that may participate in or contribute to the IM/IT project.
- Specify the criteria for selecting subcontractors.
- Generate a separate management plan for each subcontract, using a tailored version of this Project Plan, and include all items necessary to ensure successful completion of each subcontract as follows:
  - requirements management,
  - monitoring of technical progress,
  - schedule and budget control
  - product acceptance criteria,
  - risk management procedures,
  - additional topics as needed to ensure successful completion of the subcontract, and
  - a reference to the official subcontract and subcontractor/prime contractor points of contact.

## 5.8 Process Improvement

- Specify the plans for periodically assessing the project, for determining areas for improvement, and for implementing the improvement plans.
- Ensure that the process improvement plan is closely related to the problem resolution plan.
- Include in the improvement plan, a process to identify the project processes that can be improved without serious disruption to an ongoing project, and to identify the project processes that can best be improved by process improvement initiatives at the organizational level.

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## 6. Additional Plans

- Specify or reference any additional plans required to satisfy product requirements and contractual terms, which may include:
  - plans for assuring that safety, privacy, and security requirements are met,
  - special facilities or equipment specification,
  - product installation plans,
  - user training plans,
  - integration plans,
  - data conversion plans,
  - system transition plans,
  - product maintenance plans, or
  - product support plans.

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# Annex A

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# Annex B

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