

PPM programme & project management

Guide to Project Charter Writing

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Version: 4.0
 Release Date: April 2016

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Acronyms and Abbreviations

AC	Actual Cost
ACWP	Actual Cost of Work Performed
AD	Activity Description
ADM	Arrow Diagramming Method
AF	Actual Finish date
AOA	Activity-on-Arrow
AON	Activity-on-Node
AS	Actual Start date
BAC	Budget at Completion
BCWP	Budgeted Cost of Work Performed
BCWS	Budgeted Cost of Work Scheduled
BOM	Bill of Materials
CA	Control Account
CAP	Control Account Plan
CCB	Change Control Board
CoQ	Cost of Quality
CPFF	Cost-Plus-Fixed-Fee
CPI	Cost Performance Index
CPIF	Cost-Plus-incentive-Fee
CPM	Critical Path Method
CSF	Critical Success Factor
CV	Cost Variance
DD	Data Date
dplg	Department of Provincial and Local Government
DPSA	Department of Public Service and Administration
DU	Duration
EAC	Estimate at Completion
EF	Early Finish date
ES	Early Start date
ETC	Estimate to Complete
EV	Earned Value
EVM	Earned Value Management
FF	Free Float or Finish-to-Finish
FFP	Firm Fixed-Price
FFS	Fees for Services
FPIF	Fixed Price Incentive Fee
FS	Finish-to-Start
FTE	Full Time Equivalent
GERT	Graphical Evaluation and Review Technique
HR	Human Resources
IFB	Invitation for Bid
ISO	International Organisation for Standardisation
IT	Information Technology
LF	Late Finish date
LOE	Level of Effort
LS	Late Start date
NT	National Treasury
OBS	Organisation(al) Breakdown Structure
PALAMA	Public Administration Leadership and Management Academy
PC	Percent Complete
PDLC	Product Development Life Cycle
PDM	Precedence Diagramming Method
PERT	Program Evaluation and Review Technique
PF	Planned Finish date

PM	Project Management or Project Manager
PMBOK	PMBOK® Project Management Body of Knowledge
PMI®	Project Management Institute
PMO	Programme / Project Management Office
PMP®	Project Management Professional
POC	People and Organisation Framework
PPM	Programme and Project Management
PS	Planned Start date
PV	Planned Value
QA	Quality Assurance
QC	Quality Control
RAM	Responsibility Assignment Matrix
RASCI	Responsibility, Approves, Supports, Consulted, Informed
RBM	Results Based Management
RBS	Risk Breakdown Structure
RDU	Remaining Duration
RFEOI	Request for Expression of Interest
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Quotation
RFR	Request for Resources
RFS	Request for Services
RFT	Request for Tender
RSA	Republic of South Africa
SF	Scheduled Finish date or Start-to-Finish
SMART	Specific, Measurable, Achievable, Relevant, Time bound
SME	Subject Matter Experts
SOW	Scope / Statement of Work
SPI	Schedule Performance Index
SS	Scheduled Start date or Start-to-Start
SV	Schedule Variance
T&M	Time and Materials
GTAC	Government Technical Advisory Centre
TC	Target Completion date
TF	Total Float or Target Finish date
TOR	Terms of Reference
TQM	Total Quality Management
TS	Target Start date
VE	Value Engineering
WBS	Work Breakdown Structure

1 Introduction

1.1 Why Projects?

There are many successful projects within the Public Service, but there are also many challenges encountered in managing complex and large-scale projects. The importance of project management as a strategic business tool and enabler of transformational change and the need for expert project management, has been recognised. The Government Technical Advisory Centre of National Treasury has recognised the importance of building capacity in projects and partnerships in the Public Service, as both are important enablers of transformational change and support the development and implementation of government priorities.

Projects are a powerful vehicle for enabling transformational change and developing internal Public Service strategic project management capacity supports:

- achievement of government priorities; • implementation of results based plans; • modernisation of government; • knowledge transfer; and, • reduced reliance on external consultants.

1.2 Project Management in the Public Service

There is currently little consistency in the approach to project management in the Public Service. This makes it difficult to accurately quantify the project management maturity of the organisation as a whole. Most Departments operate independently and even within specific Departments and Divisions there can be significant variation in rigour, approach and maturity of project management processes, methodologies and expertise. While there are many examples of skilled Project Managers applying a disciplined approach with effective results, there are other areas which still have significant room for improvement in their application of project management best practices.

In addition to the varying degrees of project management discipline within the organisation, project management capacity and expertise are also not uniform. There are varying levels of skills and expertise across the organisation, even among Project Managers. The variety of job classification levels used for Project Managers, compounded by contrasting experience, qualification, training and education levels, make it difficult to ensure that project management discipline is applied uniformly from project to project. Varying knowledge and capacity exists for effective project scoping, planning, cost and duration estimating. The application of „best practice“ techniques for tracking, monitoring and reporting between projects is therefore unmanageable.

Besides the challenges facing internal projects, many large initiatives across departments require specific expertise in managing these complex partnerships. Large initiatives may also be staffed with a combination of resources from various departments and also with external consultants. As is to be expected, this mixture of resources from dissimilar internal and external sources can result in cultural and communication challenges, knowledge transfer issues and HR concerns.

1.3 A Programme and Project Management Framework

GTAC offers a corporate approach to project management through a customised **Programme and Project Management Framework**¹ (PPM Framework). The framework provides a standardised, corporate, „best practice“ approach for the management of projects in the Public Service with a clear, recommended, step-by-step process. Available via an internal website, the framework provides project workers with an easy-to-follow guide with clear objectives, suggested steps and actions,

¹ Refer to the PPM website for the most recent version of the Programme and Project Management Framework (FWK_1)

helpful checklists and links to practical tools, techniques, templates and additional resources. The advantage of the corporate approach is that it is based on accepted „best practices“ (it is a derivative of the Guide to the Project Management Body of Knowledge, i.e. “The PMBOK ® Guide”, published by the Project Management Institute, PMI®), but is aligned with existing Public Service policies (e.g. management of risk), directives (e.g. procurement), business practices (e.g. records management) and other corporate initiatives (e.g. knowledge management). Furthermore, due to the extensive number of stakeholders and partners, whose varying sets of values, principles and expectations need to be considered, especially when carrying out multi-department or interdepartment projects, the PPM Framework recognises the importance of people by integrating project management processes and activities with people and organisation change management principles, stages and actions.

The PPM Framework, as illustrated below, recommends a phased methodology for conducting project work in the Public Service with clear objectives and checkpoints for each phase.

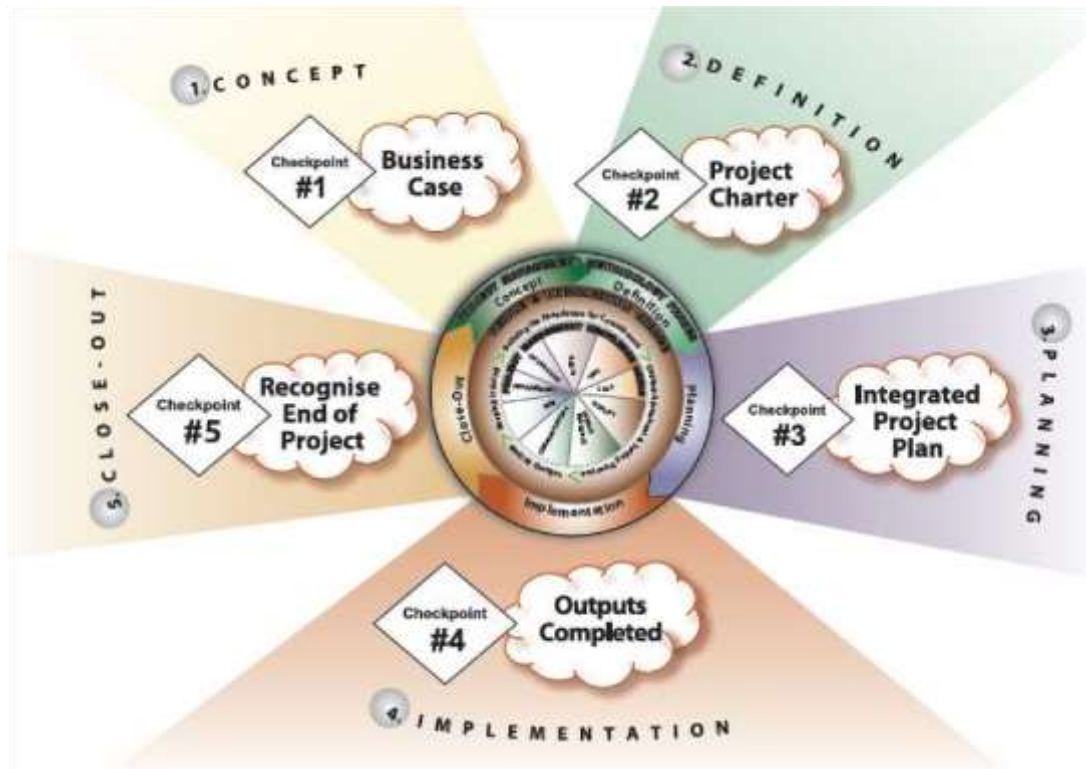


Figure 1: Project Management Framework

1.4 Benefits of Adopting a Consistent Approach

The benefits of adopting a consistent, standard approach to project management across the entire organisation include:

- Improved decision-making
- Fast-tracked project start-up
- Improved project scoping
- Greater predictability of results
- More effective use of resources
- Increased satisfaction of those involved and impacted
- Calculated management of risk

- Improved knowledge transfer
- More connected organisation working together across horizontal and vertical boundaries
- Reduced duplication
- Better project outcomes

1.5 Scope and Purpose of this Document

The purpose of this document is to complement the PPM Framework and any other departmentspecific project management methodologies that exist in the Public Service, with material suited to the specific process of writing an effective **Project Charter**. It is intended as a guide, providing practical advice and a detailed explanation of the steps in a charter writing process that can be used by departments or any other organisation within the Public Service. While primarily targeted for project managers, the guide can also be used by other project management practitioners who have either been asked to lead a project, or are simply interested in improving their understanding or gaining the knowledge needed to develop effective Project Charters.

The Guide to Project Charter Writing²:

- Explains why Project Charters are done and what the benefits of charters are;
- Outlines the key players and their roles and responsibilities during Project Charter development;
- Provides a process for creating an effective Project Charter, that is based on “best practices”;
- Provides advice, tips and suggestions that may be helpful during each step of the Project Charter writing process;
- References the placement of a Project Charter within the PPM Framework, as well as available tools, templates and checklists in the PPM that may be of use during Project Charter development and how a Project Charter is used during the latter phases of a **Project Management Methodology**³.

1.6 How to Use this Document

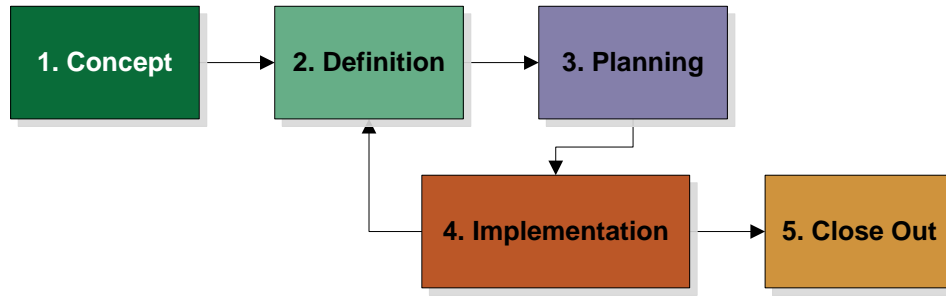
This document contains a process. It is intended for a variety of audiences and can serve as a practical approach to Project Charter writing for anyone in the Public Service who may be leading, managing or participating in Public Service projects.

1.7 Project Management Context

The figure below shows where a Project Charter is integrated into the PPM Framework. There are five phases in the methodology, the Project Charter is the output of the Definition Phase (phase 2).

² Refer to the PPM Website for most recent version of the Guide to Charter Writing (GUI_3)

³ Refer to the PPM website for the most recent version of the PPM Methodology (MET_1)



The purpose, objectives and deliverables of each phase are as follows:

Phases	Purpose and Objectives	Key Deliverables
Concept	<u>Purpose:</u> determine that a project is needed and, on a high level, specify what the project should accomplish as well as who needs to be involved. <u>Objective:</u> obtain official approval to formally initiate a project.	<i>Business Case</i>
Definition	<u>Purpose:</u> define and add structure to the project. <u>Objectives:</u> determine the governance structure, assign the project manager, document the high-level scope and clearly document the project outputs, outcomes and key constraints (time, budget, resources).	<i>Project Charter</i>
Planning	<u>Purpose:</u> ensure all aspects of the project are identified, planned and appropriately documented. <u>Objectives:</u> define the scope in detail, determine the required resources, time and money, determine the processes to monitor and control the project.	<i>Integrated Project Plan</i>
Implementation	<u>Purpose:</u> execute the tasks and activities that have been planned and documented in the Integrated Project Plan. <u>Objective:</u> carry out the work needed to complete the project deliverables and achieve the project outputs, while monitoring and controlling the project's progress and performance.	<i>Kick Off Meeting Change Requests Progress Reports Project Deliverables</i>
Close-Out	<u>Purpose:</u> deliver the end product to the client and get their approval, review results and make improvements for the future. <u>Objectives:</u> complete all outstanding project activities, create project archives, document lessons learnt, arrange for knowledge transfer and facilitate the transition to operations (if applicable).	<i>Sign Offs/Approvals Lessons Learnt Project Archives</i>

The project life cycle is iterative in the sense that challenges, obstacles or issues encountered during the implementation phase may require the project manager to re-define or re-plan all or part of the project. In such cases, it is important to ensure that the **Project Change Control** process is used to document all changes.

2 Project Charter 101

2.1 What is a Project Charter?

A Project Charter is a document that forms a common agreement on the project scope among those involved in the project. This includes the project manager, the project sponsor, project partners, key stakeholders and project team members (refer to the Appendix for a summary of roles and responsibilities as well as the **Guide to Project Sponsorship**⁴). Once approved, the charter forms the basis upon which future project decisions are made. It is intended to be issued only once.

The Project Charter formally announces the existence of the project and acts as a terms of reference for the project.

Tip: If a change occurs later in the project and it significantly alters the project's scope and purpose as outlined in the Project Charter, then a new charter should be created.

2.2 What are the benefits of a Project Charter?

A Project Charter:

1. Provides a basis for scope management and control, i.e. it helps to prevent scope creep in later stages of the project by placing explicit boundaries early on around what is and what is not included as part of the project's scope
2. Formalises commitment of the project sponsor and partners to contribute necessary resources (people, money, equipment, etc.) to complete the project goals and objectives and confirms that they understand what will be delivered and that they agree with the performance measures and success criteria specified in the charter
3. Formalises commitment of the project team, i.e. that the members have understood their roles and responsibilities on the project and are committed to its successful completion
4. Formalises commitment of the project manager to plan, execute, monitor, control and complete the project in accordance with the purpose, goals and objectives listed in the charter. Confirms that he/she understands what needs to be done, what resources will be available and how the success of the project will be measured.

2.3 Who is involved in creating a Project Charter?

The Project Manager:

- is accountable for the creation of the Project Charter
- is responsible for bringing the right people together to effectively discuss, define and complete all sections of the Project Charter
- is responsible for obtaining sign-off on the charter from the project sponsor, partners and project team members
- signs the completed Project Charter indicating agreement to the contents and direction of the project.

The Project Sponsor:

⁴ Refer to the PPM website for the most recent version of the Guide to Project Sponsorship (GUI_2)

- is responsible for providing the necessary information about the project required by the Project Manager to complete the charter, in addition to communicating the background, business case and the context for the project
- assists the Project Manager to acquire the resources needed for the development of the Project Charter
- supports the Project Manager in identifying potential partners and negotiating partnership agreements
- validates the project purpose, goals, objectives and performance measures •
solicits information and buy-in from the key Project Stakeholders & partners
- signs the completed Project Charter indicating agreement to the contents and direction of the project.

Project Partners:

- negotiate partnership agreements and participate, as needed, in the development of the Project Charter by providing resources and/or contributing to discussions and decisions • validate the project purpose, goals, objectives and performance measures
- sign the completed Project Charter indicating agreement to the contents and direction of the project.

The Core Project Team:

- drives out the scope and deliverables, assumptions, constraints, project risks and risk response strategies, project team roles and responsibilities, timelines and costs
 - for large or complex projects, this team also drives out some additional components for the charter i.e. communications requirements, change impacts, linkages to related projects, critical success factors and/or strategic alignment
- signs the completed Project Charter indicating agreement to the contents and direction of the project.

Key Project Stakeholders:

- are informed, consulted and/or participate, as needed, in discussion and decisions related to project scope and deliverables, assumptions, constraints, timelines, costs and resource requirements

Tip: An inclusive and collaborative approach helps to get early buy-in from the decisionmakers, partners, key stakeholders and the people who will be responsible for delivering the work on the project. It also promotes team building in the Core Project Team.

2.4 When do you create a Project Charter?

A Project Charter is part of the process of defining a project. It is created once a formal decision has been made to do the project. In the PPM Framework, the completed and approved Project Charter marks the end of the Definition Phase (phase 2).

3 Project Charter Writing Approach

A process has been created to assist project managers in creating effective Project Charters. The process has a number of steps, each of which has a specific goal and specific participants. This

process has been integrated with the PPM Framework and this Guide includes references all of the templates you will need during the charter writing process.

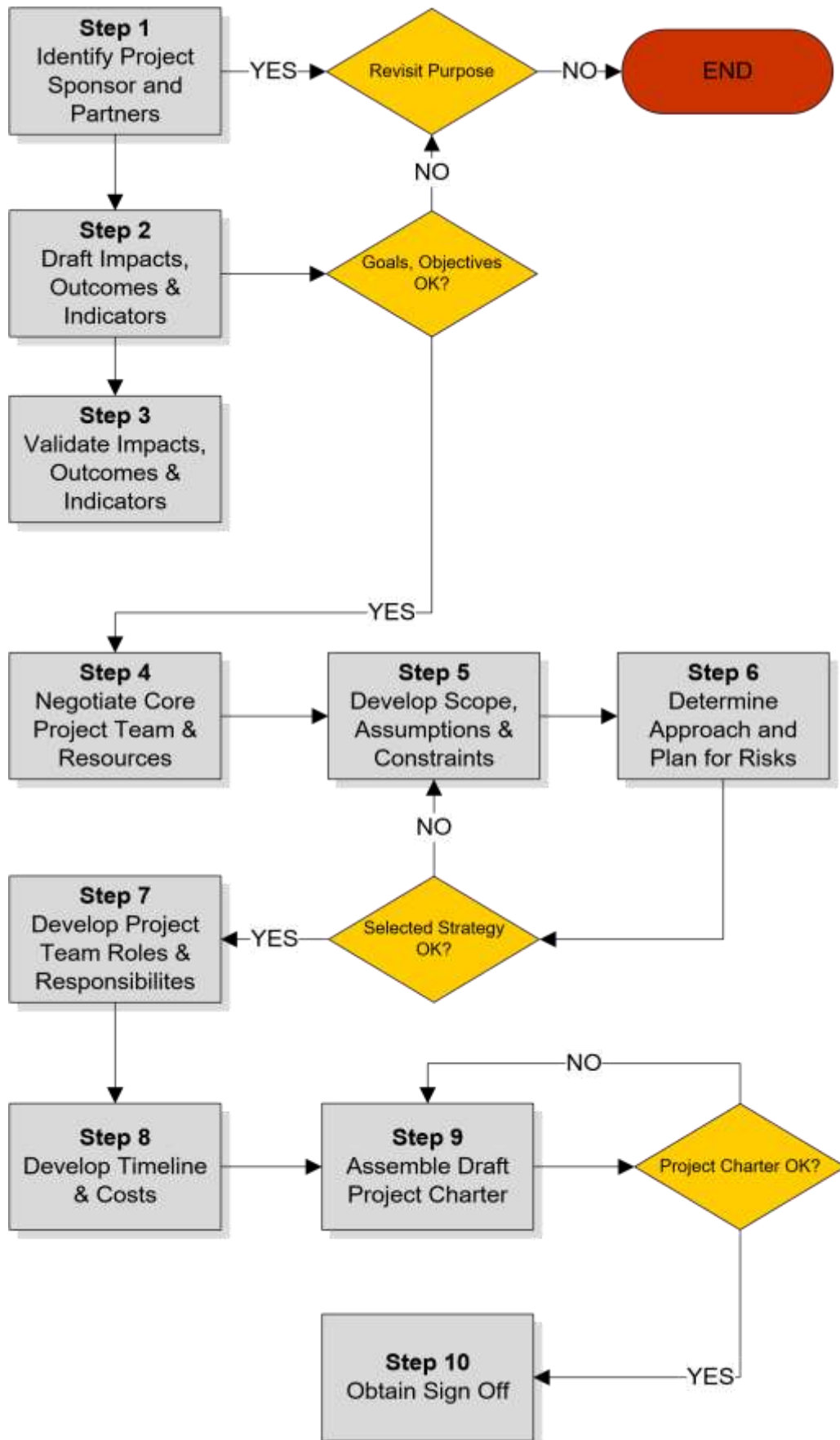
3.1 Principles

There are several principles under which this process was developed:

1. It incorporates best practices for Project Charter development.
2. It is scalable i.e. it can be applied to both small and large or complex projects.
3. It is inclusive and collaborative and ensures the right people are informed, consulted and/or included as needed.
4. It helps to ensure the right information is created in the right way.
5. It supports the PPM Framework but also complements other project management methodologies.
6. It is based on the PPM Project Charter templates but can also be used with any other Project Charter templates.

3.2 Process

Please refer to the next page for a visual representation of the process.



3.2.1 **Step 1 – Identify the Project Sponsor and Partners**

Purpose: To identify the project stakeholders who will set the direction for this project and make decisions on how the project is to proceed.

Inputs: The **Business Case**, including **Stakeholder Analysis**
Other documents describing the context of the project, the **need / problem / opportunity** to be addressed.

Who: Project Manager, Project Sponsor, Functional Managers

Process:

1. Understand the Project Background.

How: Review the business case and background documents.
Interview key stakeholders and others who contributed to the business case.
Interview the person who requested this project.

2. Confirm /Identify the Project Sponsor.

How: Review the business case to identify the Project Sponsor.
If no Sponsor is identified, check with the person who assigned you to be the project manager:

- determine who best meets the sponsor criteria
- enlist the assistance of your functional manager and/or the person who assigned you to be the project manager, to identify the best candidate and influence this candidate to become the Project Sponsor.

Tip: You must know who the Project Sponsor is in order to continue.

3. Identify Project Partners.

How: Review the business case and supporting documents.
Prepare a Stakeholder Analysis if one does not exist.
Have a discussion with the Project Sponsor to get agreement as to which stakeholders are likely partners.
Be prepared to educate the sponsor on “what is a partner”. A partner is a group or individual who provides something to the project, e.g. resources, in order to get something from the project, e.g. a deliverable.
Work with the Project Sponsor to identify potential project partners and negotiate partnership agreements as needed.

Outputs: A revised or completed Stakeholder Analysis.

A draft version of the following sections of the Project Charter:

- Project Partners
- Project Stakeholders

3.2.2 **Step 2 – Draft the Project Impact, Outcomes and Outputs,**

Purpose: To gather information required to gain consensus and approval from all project partners and stakeholders; prior to the stakeholder meeting in Step 3.

Inputs: Business Case
Stakeholder Analysis
Other documents supporting the project benefits, expected outcomes or objectives.

Who: Project Sponsor, Project Manager

Process:

For all of the steps listed below the techniques are:

How: Review the business case and background documents.

Interview the Project Sponsor, key stakeholders and partners.

Interview the core team members and subject matter experts.

1. Identify the purpose of this project. (why this project is being undertaken). Include a description of the need or opportunity that is driving the project and/or the problem(s) the project is aiming to solve.
2. Identify the benefits that are expected at the end of the project. Focus on the desired results. Include any specific metrics and targets to be achieved and any relevant timeframes.

Note: For large or complex projects, also include information specific to the strategic alignment of the project. How is this project aligned with Department results-based plans, strategies or overall government priorities?

3. Identify the goals of the project i.e. the high-level outcomes to be achieved.
4. Confirm that the successful completion of these goals will indeed result in the previously identified project benefits.
5. For each identified and documented goal, identify specific objectives that will accomplish this goal, i.e. outputs, of the project.
 - a. Identify the major activities that will be performed to achieve the goals.
 - b. Identify the deliverables that will be produced, signifying completion of the activities.

Note: Ensure the objectives and performance measures are **SMART** (Specific, Measureable, Achievable, Relevant, Time bound).

6. Identify the performance measures / indicators that can be used to check if the objectives have been met and the expected results successfully achieved.

Tip: Performance measures are very important! They may include an attribute (e.g. time, cost), a metric (e.g. months, dollars) and an absolute (e.g. 90%) or relative (e.g. less than, greater than) value; or, acceptance measures (e.g. sign-off). If you don't achieve the performance measures, your project won't be seen as a success – so take the time to think these through and expect lots of dialogue on these with your Sponsor and Partners.

7. Prepare meeting materials for the charter kick-off meeting using the information from the previous steps using tools and templates provided in the Implementation Phase (phase 4).
8. Invite the Sponsor and Partners to a meeting to discuss and reach consensus on the project's impact, outcomes, outputs and performance targets. (Step 3) The invitation should include the meeting details (specifying purpose, location and time) and a request to review the draft materials attached to the invitation prior to the meeting.

Tip: For large or complex projects, also identify extract information that relates to the triple constraint (scope vs. time vs. cost) and draft the priorities among these. Refer to the PPM Framework for further explanation of the principles and application of the Triple Constraint.

Outputs: A draft version of the following sections of the Project Charter:

- impact
- benefits
- outputs & performance targets
- Charter Meeting Invitations sent along with draft materials.

3.2.3 **Step 3 – Validate the Project Impact, Outcomes and Outputs**

Purpose: To ensure partner needs and wants are considered and to ensure alignment of expectations between the sponsor and partners, including the client on the project.

Inputs: Draft sections of the Project Charter (from Step 2)

Business Case

Other documents supporting the project benefits, expected outcomes or objectives.

Who: Project Partners, Project Sponsor, Project Manager

Process:

For all of the steps listed below the techniques are:

How: A meeting with the group of project partners, key stakeholders and Sponsor.

Individual or small group meetings as required.

Facilitation of discussions on each item to gain acceptance (content & quality).

- 1) Review the impact of the project. Revise/expand upon it as needed.
- 2) Obtain agreement and commitment to the purpose of the project.

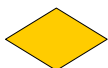
IF NO AGREEMENT IS REACHED, STOP THE PROJECT.

- 3) Review the goals of the project. Revise/expand upon them as needed.
- 4) Obtain agreement and commitment to the goals of the project.

IF NO AGREEMENT IS REACHED, STOP THE PROJECT.

- 5) For each goal, review the outcomes and outputs (major activities and inputs) and revise as needed. Apply SMART principles to ensure quality.
- 6) For each objective, review the performance measures and revise as needed. Establish any acceptable variances. Apply SMART principles to ensure quality.

Tip: Ensure that everyone understands the implications and nature of the performance measures. Remember, if you don't meet the performance measures, your project won't be perceived as successful.



Decision Point: Do you have a consensus on the goals, objectives and performance measures? If not, then the purpose of the project should be re-visited or the project should be cancelled.

Outputs: A final version of the following sections of the Project Charter:

- purpose
- benefits
- goals, objectives and performance measures
- A decision on whether to proceed with this project or not.

3.2.4 **Step 4 – Negotiate the Core Team Resources and Confirm Template**

Purpose: To negotiate the use of resources for drafting the charter and to get agreement on what will be included in the final Project Charter.

Inputs: Project purpose, goals, objectives (from Step 3)

Who: Project Partners, Project Sponsor, Project Manager, Functional Managers, and consultants

Process

- 1) For each objective that was identified in Step 3, determine the core skills, knowledge and experience needed to identify:
 - a. Scope and Deliverables (in and out of project)
 - b. Assumptions and Constraints
 - c. Project Risks and Risk Response Strategies
 - d. Project Team Roles and Responsibilities
 - e. High Level Project Duration (Milestones/Timelines)
 - f. High Level Project Costs (Budget)

Tip: For large or complex projects, this list will also include communications requirements, linkages to related projects, change impacts and critical success factors.

- 2) Provide this guideline to the Project Sponsor and partners, along with any thoughts on specific people that you may be considering.

How: Consider specialists for the primary project areas.

Include resources from the partner departments.

Include those who have participated in preparing Project Charters in the past.

- 3) For potential candidates suggested by the sponsor or partners, verify that they meet the requirements listed above.
- 4) Prepare an estimate of the time commitment required for each resource to contribute to preparing the Project Charter.

How: Use estimates from prior projects as a guide for the current estimates.

Be aware of the required deadline for completing the Project Charter.

Identify the commitment required (full-time, part-time) from the resources as well as the effort.

Identify the assumptions that went into creating the estimates.

- 5) Provide the Project Sponsor with the final list of resources and time estimates for review and approval.

- 6) Obtain approval of the list from the Project Sponsor and partners.
- 7) Obtain commitment from the Project Sponsor and partners to provide the required resources for the requested amount of time.
- 8) Obtain agreement on the Project Charter template that will be used e.g. PPM template or a department-specific template. If your department has a Project Management Office (PMO), contact them to see if there is a department-specific Project Charter template.

Outputs: Core project team members are ready to begin work on the remaining sections of the Project Charter.

A Project Charter template.

3.2.5 **Step 5 – Develop the Scope, Assumptions and Constraints**

Purpose: To negotiate the use of resources for drafting the charter and to get agreement on what will be included in the final Project Charter.

Inputs: Project impact, outcomes and outputs (from Step 3)

Core Project Team Members (from Step 4)

Project Charter Template (from Step 4)

Who: Core Team Members, Project Manager

Process:

- 1) Review the project impact, outcomes, output and performance targets

How: Conduct a meeting with the core project team, including the Project Sponsor.

Have the Project Sponsor explain the business context and address any questions related to it.

- 2) Develop a short description of the overall scope of this project and document in a **Scope Statement**.

How: Ask the Sponsor to describe the output of this project in 2 or 3 sentences.

Identify the primary, high-level deliverables for this project.

- 3) Define scope and deliverables to be created as part of this project. Explicitly state any deliverables or work that will not be done as part of the project as out-of-scope.

Tip: The in-scope items describe the deliverables to be produced, the work that will be done in order to produce them, the features and functions of the deliverables and the acceptance criteria for each deliverable.

How: Collaborate, collaborate, collaborate!

For large or complex projects, each Core Project Team member should take responsibility for identifying the deliverables and work required to meet one or more of the objectives.

Use specialists to help.

Use the Scope section of previous similar projects as a base.

Tip: Include both product deliverables (documents, systems, services, etc.) and project management deliverables. Reference the PPM Framework and Methodology for a

list of standard project management deliverables (e.g. Integrated Project Plan, Status Updates and Reports, Issues Log, Change Request Log, Risk List).

Tip: If the project is to be transitioned to operations, include knowledge transfer, training, staff relocation and other transition components; or if the project requires legislative or regulatory changes, include those components as appropriate.

Tip: You may want to cross-reference each scope item to the objective it addresses, to ensure:

- you have considered all of the objectives
- all of the scope items are relevant to at least one objective
- the deliverables offer the right solution to the right objective.

- 4) Define out-of-scope items for each in-scope item, to help create the project boundaries and clarify the scope of the project.

Tip: The out-of-scope items explicitly state any deliverables or work that will not be done as part of the project.

How: Collaborate, collaborate, collaborate!

Interview key stakeholders and partners to help identify project boundaries.

Review the work in related projects so that duplication of work does not occur.

Identify other related projects / initiatives that may have been completed or are in progress that could affect the project

Tip: Consider people and organisation change management deliverables and activities as appropriate.

- 5) Integrate lists of in/out-of-scope items that have been defined by different groups/teams within the project to eliminate duplication and cross-reference out-of-scope items.
- 6) Document any Assumptions and Constraints that apply to your in /out-of-scope statements.

Tip: Constraints are factors that are outside the control of the project team, that restrict or regulate the project by limiting available options.

Tip: Assumptions are external factors that, at the time of writing the charter, are considered true, real or certain for purposes of planning. An assumption helps to fill in gaps.

Outputs: The following sections of the Project Charter template are complete:

- scope statement
- in/out-of-scope

Information to add to the following sections of the Project Charter:

- assumptions
- constraints

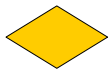
3.2.6 **Step 6 – Determine the Approach and Plan for Risks**

Purpose: To identify the approach to completing this project and identify those things that could jeopardise the success of this project.

Inputs: Project scope statement (from Step 5)
Background information

Who: Core Team, Project Manager **Process**

- 1) Review the project performance measures and scope statement to confirm the success measures of the project.
- 2) Determine the approach to be used for the project. Will there be stages or releases and if so, what will these be? Things to consider here:
 - Are you following a Product Development Life Cycle (PDLC)? Are there gates? (Refer the PPM Framework for more information on Project Life Cycles).
 - Which deliverables do you think you can accurately estimate work effort for? Put these into an earlier stage or release.
 - Which deliverables have too many unknowns to accurately estimate their cost? Put these into a later stage or release. Ensure that the information required to estimate their cost more accurately is gathered in an earlier stage or release.
 - Do some deliverables depend on other deliverables being completed first? If so, ensure your approach takes this into consideration.



Decision Point: Do you have consensus on the approach?

- 3) Perform a risk analysis on the project.

Every project experiences problems, so the earlier that you can anticipate what these might be, the better you can plan for how to avoid or mitigate them.

How: Identify risk events that might happen and that could have a consequence on the success of the project.

Evaluate the probability of the risk event (High, Moderate, Low) occurring.

Evaluate the consequence of the risk event (on your schedule, budget and scope) should it occur (High, Moderate, Low).

For risks with a high consequences and/or high probability, devise high-level strategies to try (a) to avoid each risk event and (b) mitigate it if it occurs.

For a complete discussion of risk management, please refer to the PPM Framework

Outputs: The following sections of the Project Charter template are complete:

- preliminary risk analysis

3.2.7 **Step 7 – Develop the Project Roles and Responsibilities**

Purpose: To identify what roles are needed on this project, what the responsibilities of each role are and who will fill each role.

Inputs: Project scope statement (from Step 5)
 Project Stakeholder Analysis (from Step 1)
 List of Project Partners (from Step 1)
 Background Information

Who: Project Manager

Process:

To identify responsibilities for each step, the techniques include:

- How:** Include items relating to:
- communication
 - decision-making, including project checkpoints
 - participation in issues & problem resolution
 - participation in project management processes

Refer to the PPM Framework for guidelines on responsibilities for project stakeholders. Refer to the Guide to Project Sponsorship for responsibilities relating to Executive Sponsors, Project Sponsors and Steering Committees.

Use the RASCI legend to assist in describing the responsibilities.

R	responsible: ensures that the work is done, co-ordinates the work among those supporting, may also contribute to the work
A	approves: signs-off that the work was done (verifies quality and completion; concurs with the work)
S	supports: provides support and resources or does the work; if there is no 'S' for a row, the 'R' does the actual work
C	consulted: must be consulted before activity/deliverable is completed; provides input/recommends solutions
I	informed: must be informed of progress and/or of the final results

- 1) Identify the responsibilities of the stakeholders identified in the Stakeholder Analysis.

How: Include the Executive Sponsor, Project Sponsor, Steering Committee and Project Partners.

- 2) Define the primary project team roles and who might fill them.

How: Include the project manager, core project team members, project team leaders and sub-project leaders.

- 3) Define any secondary project team roles that will be needed to support this project and who might fill them.

Other roles to consider:

- Specialists: these are the “experts” that you need on the project team. Their areas of expertise may be process, technology, policy or something else. Focus on the

specialist whose involvement you and the core project team feel will be key to the success of the project. Specify the knowledge and experience needed and nominate specific individuals for the role.

- Project Co-ordinator: may be applicable to a large or complex project. This role offloads the project administration from the project manager and typically has responsibility for keeping project schedules and logs up-to-date, taking minutes from project team meetings, etc.
- Project Quality Manager: this role should consider who needs to be involved to review and ensure the quality of the product deliverables as they are produced. Sometimes this role is fulfilled by the Core Project Team members, or the specialists; other times it may be played by a Quality Assurance or Internal Audit group.

4) Define the responsibilities relating to all project team roles.

How: Include responsibilities relating to involvement in project planning, status reporting, participation in charter development and completion of project deliverables.

Tip: The roles and responsibilities may not include reference to every individual who will work on the project at some point. However, reference to roles that cover all potential project participants must be included.

Outputs: The following sections of the Project Charter template are complete:

- Responsibilities column of the Project Communications Strategy
- Roles & Responsibilities column of the Project Partners Section
- Team Member & Role columns of the Project Team Section

3.2.8 Step 8 – Develop the Timeline and Costs

Purpose: To identify milestones

Inputs: Project scope statement (from Step 5)
Core Team Members (from Step 4)
Background information

Who: Core Team Members, Project Manager, Project Sponsor

Process:

- 1) Estimate project timelines by identifying project milestones and their target due dates. At a minimum, include milestones for the following:
 - a. project start date
 - b. completion of key deliverables
 - c. completion of each phase, stage or release
 - d. project end date

How: For time-bound projects:

- the project end date is dictated and fixed
- work backwards from the project end date to determine phase milestones and deliverable milestones

- use the date you started the Project Charter Writing Process as the project start date

Tip: If you can't hit the mandated project end date, you can ask to either decrease the scope (remove deliverables) or increase the cost (add resources). You must get the agreement of the sponsor if you feel you need to do either of these things. Refer to the PPM Framework for more information on the triple constraint and details on the trade-offs between time, scope and cost.

How: For projects that are not time-bound:

- use the date you started the Project Charter Writing Process as the project start date
- work forwards from the project start date to determine deliverable milestones, phase milestones and the project end date

Tip: Have the Core Project Team members define dates for the key deliverables that they took ownership of previously (in consultation with some of the resources identified in Step 7). The stage or release completion dates will be a function of the deliverable completion dates (since each stage or release will contain at least one of the key deliverables).

Tip: Use month/year as the date format. This provides some flexibility as the dates will be further defined in the planning phase.

Tip: Don't forget to include the key project management deliverable dates and the project management phase completion dates.

- 2) Identify all assumptions and constraints that contribute to your timeline estimates.
- 3) Estimate project costs. According to the PPM Framework, at this point the costs can be estimated with approximately 25% accuracy.
 - a. Estimate costs by deliverable and fiscal year in the following categories:
 - i. Salaries
 - ii. Benefits
 - iii. Materials/equipment
 - iv. Office space/facilities
 - v. Training
 - vi. Consultants
 - vii. Other (please specify)
 - b. Summarise costs by category and by the financial year

Tip: If the Project Sponsor is pressing for better accuracy, explain that this will be possible in the Planning Phase, once detailed plans are created. These plans will include "who is doing what and when", which will facilitate more accurate estimating.

- 4) Identify all assumptions and constraints that contribute to your budget estimates.

Outputs: The following sections of the Project Charter template are complete:

- High Level Project Cost
- High Level Project Timelines

Additional information in the following sections of the Project Charter:

- Assumptions
- Constraints

3.2.9 **Step 9 – Compile the Draft Project Charter**

Purpose: Prepare the Project Charter document ready for approval by the project sponsor and partners

Inputs: Output from all previous steps
Project Charter Template (Step 4)

Who: Project Manager, Core Team Members

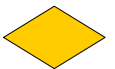
Process:

- 1) Using the template previously agreed upon, draft the Project Charter including the outputs from Steps 1-8.
- 2) Complete remaining sections of the Project Charter.

Note: For large or complex projects, you also need to include some additional components such as strategic alignment, communication requirements, change impacts, linkages to related projects and critical success factors.

- 3) Review the Project Charter with the Core Project Team, revising as needed to get consensus.

Decision Point: Do you have consensus on the charter from the Core Project Team? This is review and sign-off.



Outputs: A completed Project Charter ready for review and approval by the project sponsor.

3.2.10 **Step 10 – Obtain Sign-off**

Purpose: To obtain agreement

Inputs: Draft Project Charter (from Step 9)

Who: Project Sponsor, Project Manager, Project Partners (including clients)

Process:

- 1) Prepare meeting materials for the Project Charter sign-off meeting.
- 2) Invite the Project Sponsor, Project Partners and Core Project Team to the meeting to discuss the draft charter and obtain sign-off.
necessary before submitting the charter to the Project Sponsor and Project Partners for

How: The invitation request should include the meeting details (specifying purpose, location and time) and a request to review the draft Project Charter attached to the invitation prior to the meeting.

3) Lead the Project Charter sign-off meeting.

How: Walk through the Project Charter.

Answer any questions the Project Sponsor and Partners may have.

Confirm that the Project Sponsor and Partners understand that their signature on the charter indicates:

- agreement with the contents including the approach, schedule and budget.
- their commitment to provide resources and/or funding to the project.
- they understand that project planning is next, implementation is NOT next.

Confirm that with the information presented in the charter it still makes sense to proceed with this project.

4) Obtain sign-off on the approved Project Charter from all parties.

Congratulations. With the Project Charter signed-off, you have now completed the Definition Phase (phase 2) and as per the PPM Framework you are ready to begin the Planning Phase (phase 3).

4 Appendix A: Project Roles and Responsibilities

4.1 Executive Project Sponsor

The individual who takes a leadership role in inter-departmental projects or partnerships and gets commitment, negotiates agreement among the partners about the project (at a high level) and then directs people to work together to fulfil the project goals and objectives. This person will ensure all necessary stakeholders are committed to contributing to project success.

An Executive Sponsor will have the necessary authority and influence across the organisation to make timely and effective decisions relating to the project and to assist in removing organisational barriers to the success of the project. The Executive Sponsor lends their name, support and authority to the project to enhance the chances of project success.

The Executive Sponsor is the *Champion* of the project and has the following responsibilities:

- Supporting the Project Manager and the Project Sponsor.
- Issues that cannot be resolved by the Project Sponsor will be raised to the Executive Sponsor and the Steering Committee for resolution.
- The Executive Sponsor may chair the Steering Committee with the support and assistance of the Project Sponsor.
- Ensure that all affected departments contribute to identifying the goals and objectives of the projects. This will ensure that there is a common goal and no conflicts.
- Confirm commitment from the funding source.
- Read, review, provide feedback to and ultimately sign the Business Case to indicate approval to proceed.
- Identify key stakeholders and invite them to participate in the Steering Committee.
- With the Project Sponsor, establish the terms of reference, responsibilities and reporting relationships for the Steering Committee.
- Identify the project constraints in terms of the triple constraint (scope/quality, time, cost) and obtain agreement from key stakeholders
- Assist the Project Sponsor and Project Manager in obtaining and confirming buy-in from project stakeholders.
- Contribute to the lessons learnt process.
- Read, review, provide feedback to and ultimately sign the Project Charter to indicate approval to proceed.
- Identify the communication requirements to be included in the project communications plan.
- Participate in issue resolution for issues raised to the Steering Committee.
- Participate in the acceptance/rejection of project scope changes that will materially affect the overall project scope/quality, time or budget.
- Assist the Project Sponsor and Project Manager in obtaining acceptance and approval of project deliverables.

4.2 Project Sponsor

The individual or group within the performing organisation that provides the financial resources for the project. (*PMBOK® 2000 Glossary*) The Project Sponsor defines, promotes and supports the objectives of the project. In addition to providing the needed financial resources, the Project Sponsor

endorses the project's goal by championing the project, signing the Project Charter document and granting approval at each milestone. The Sponsor interacts with the Project Manager and the Core Project Team Members on a regular and frequent basis throughout the project.

The Project Sponsor plays an active role as the person with the willingness to take on the single point of accountability and overall responsibility for the project. The Project Sponsor is the single point of contact for executives, stakeholders and clients, as well as the Project Manager and Core Project Team.

On a smaller project, the Project Sponsor may also fill the role of the Champion as described under the Executive Sponsor. It is the Project Sponsor's responsibility to:

- Be a single point of accountability for the project;

- Identify and monitor critical success factors for the project;
- Support the Project Manager;
- Use and follow a structured Project Management Methodology for the project;
- Protect and support the project team;
- Make timely and informed decisions;
- Identify and validate the constraints of the project;
- Identify organisational capacity barriers that could impact project success;
- Resolve project issues and problems that cannot be resolved by the Project Manager;
- STOP the project when stopping is the right thing to do;
- Establish and Chair the Steering Committee;
- Communicate regularly with project stakeholders;
- Identify what the project is all about;
- Identify key stakeholders and partners and gain their commitment to the project;
- Obtain approval to proceed with the project;
- Confirm that all key stakeholders are committed and have a common understanding of what the project is about;
- Select the right Project Manager;
- Set up the appropriate project governance structure;
- Sign the Project Charter indicating your approval of the project;
- Participate in establishing a risk management plan;
- Be supportive of the integrated project plan;
- Participate in the project change control processes.

4.3 Project Manager

It is the Project Manager's responsibility to:

- Introduce and maintain a disciplined process to managing the project;
- Develop the Project Charter;
- Develop and execute the Integrated Project Plan which covers all components of the project including, but not limited to, appropriate work breakdown structure, project schedule, resource management, risk management and quality management;

- Identify and manage risks to the project;
- Lead the core project team and work with an extended project team, which could include both internal and external resources from various functional areas;
- Establish appropriate project reporting roles and responsibilities;
- Ensure the team is working together towards the common project objective and end deliverables;
- Conduct regular project status meetings and reporting;
- Report directly to the Project Sponsor, provide regular written status reports and report as appropriate on progress to other key committees, groups and individuals;
- Keep all communication channels open and senior management well informed;
- Assist the Project Sponsor to negotiate with appropriate functional/line managers for resources required for the project (based on work package planning and overall project resource requirements);
- Monitor and control the project plan, schedule and budget;
- Track and manage project issues and ensure their timely and appropriate resolution;
- Approve changes in work package plans, activities, schedules and resource assignment/management; obtain Project Sponsor's approval on all significant changes;
- Ensure project integrity and quality through reviews, acceptance criteria, sign-offs and related approval processes;
- Oversee activities of core project team members;
- Co-ordinate with project managers of other projects that are in some way related, linked, share resources, or have another relationship with the Project;
- Motivate the project team to work as a cohesive unit and ensure the completeness of the project's products;
- Provide information on project performance for work package leaders who might work directly for other managers.

4.4 Core Project Team

Core Project Team members are designated by their immediate functional/line manager and their selection is ideally approved by the project manager. These individuals manage the main work packages within the project. When the core project team member has a dual reporting responsibility, both the functional/line and project managers should concur with and sign-off the work package plan before the final project plan approval. Core Project Team members:

- Help the project manager in work breakdown structure planning;
- Plan each work package assigned to them under the supervision of the project manager and their functional/line manager;
- Help in the selection of the work package team members and ensure that they become a cohesive part of the project team;
- Prepare required reports for the project manager, on a designated frequency, during the execution of the work package;
- Keep open lines of communication with all staff and managers interested in the project;
- Complete the work package within the acceptable limits of schedules, budgets and product quality requirements;

- Report discrepancies in plan, activities or schedule to the project manager;
- Attend project status meetings;
- May or may not be responsible for executing particular activities in a work package.

4.5 Functional/Line Managers

A manager responsible for activities in a specialised department or function. (*PMBOK 2000 Glossary*) In the Public Service, this person would be the direct Manager/Supervisor of the team members assigned to the project. For a project that requires resources from many different departments, there will be several functional managers to add to the stakeholder list.

Under the matrix approach, the functional manager is usually responsible for:

- Selecting, with the concurrence of the project manager, the Core Project Team members assigned to the project;
- Assigning the appropriate team members and co-ordinating their availability according to agreed project schedules;
- Monitoring the progress of the work assigned to their function to ensure that agreed product specifications, delivery dates and budgets are respected;
- Obtaining input from the project manager on the Core Project Team members' project performance.

5 Appendix B: Documents and Templates

The table below indicates all documents that form part of the PPM Toolkit. Those that are specifically mentioned in this document are indicated.

For the latest versions and to download templates, please refer to <http://www.gtac.gov.za>.

Toolkit Section	Ref #	Document Name	Guide to Project Start Up
1		Framework and Methodology and Guides	
	SUM	Project Management Summary Guide	✓
	FWK1 *	Project Management Framework	✓
	FWK2 *	People and Organisational Change Framework	
	MET1 *	Project Management Methodology	✓
	GUI1	Guide to Project Start Up	
	GUI1	Guide to Project Sponsorship	✓
	GUI2	Guide to Charter Writing	
	GUI3	Guide to Project Planning	
	GUI4	Guide to Smaller Projects	
	GUI5	Health Check Guide	
	GUI6	Programme / Project Management Office Set Up Guide	
	GUI7		
2		Concept Phase	
	CON1	Environmental Scan	
	CON2	Situational Assessment	

CON3	Needs Statement	
CON4	Commitment to Change	✓
CON5	Stakeholder Analysis	
CON6	Vision Statement	✓
CON7	Impact, Outcomes, Outputs, Indicators	
CON8	Alignment to Strategy	
CON8	Options Analysis	
CON9	Option Analysis Checklist	
CON9a	Clients and End-User Requirements	
CON10	Business Case	
CON11	Change Readiness Questionnaire	
CON11	Concept Phase Checklist	✓
CON12	Lessons Learnt Gathering Form	
CON13	Lessons Learnt Log	
CON14a		
CON14b		
3	Definition Phase	
DEF1a	Governance Structure	
DEF1b	Organisational Structure	
DEF2	Terms of Reference	
DEF3	Core Team Member Requirements	
DEF3	Human Resource Management Plan – Core Team	
DEF4	Project Team Member Evaluation	
DEF5	Project Team Directory	
DEF6		

Toolkit Section	Ref #	Document Name	Guide to Project Start Up
	DEF7	Roles and Responsibilities Matrix	
		Team Agreement	
	DEF8	Establishing Ground Rules	
		Operating Effectiveness of Team	
	DEF8a	Elements of Team Work Audit	
		Scope Statement	✓
	DEF8b	Stakeholder Interests Needs Assessment	✓
		Project Charter	✓
	DEF8c	Definition Phase Checklist	✓
	DEF9	Lessons Learnt Gathering Form	
		Lessons Learnt Log	
	DEF10		
	DEF11		
	DEF12		

DEF13a		
DEF13b		
4	Planning Phase	
PLA1	Scope Management Plan	
PLA2	Work Breakdown Structure	✓
PLA3	Project Deliverables Chart	
PLA4	Project Budget	✓
PLA5	Project Schedule	✓
PLA6	Human Resource Management Plan - Implementation Team	
PLA7	Performance Development Plan (Short)	
PLA8	Performance Development Plan (Comprehensive)	
PLA9a	Communications Management Plan	✓
PLA10a	Communications Worksheet	✓
PLA11a	Performance Reporting Chart	
PLA12a	Quality Management Strategy	
PLA13a	Quality Assurance & Control Chart	
PLA14a	Risk Management Plan	
PLA15a	Risk List & Risk Matrix	✓
PLA16a	Stakeholder Management Plan	✓
PLA17a	People and Organisation Change Plan	✓
PLA18a	Building Consensus	✓
PLA19a	Change Resistance Scale	
PLA20a	Evaluate the Change Plan	
PLA21a	Project Plan	
PLA22a	Lessons Learnt Gathering Form	✓
PLA23a	Lessons Learnt Log	
PLA24a		
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	IMP1	Meeting Agenda	
	IMP2	Meeting Minutes	
	IMP3	Action Items List	
	IMP4	Weekly Status Report	
	IMP4	Monthly Status Report	
	IMP5	Risk Management Form	
	IMP6	Issues Management Process	
	IMP7		
Toolkit Section	Ref #	Document Name	Guide to Project Start Up
	IMP7a	Issues Management Form	
	IMP7b	Issues Log	✓
	IMP8	Change Control Process	✓
	IMP8a	Change Request Form	
	IMP8b	Change Control Log	✓
	IMP9	Deliverables Acceptance Sheet	
	IMP9	Start-Up Checklist	
	IMP10	Lessons Learnt Gathering Form	
	IMP11a	Lessons Learnt Log	
	IMP11b		
6	Close Out Phase		
	CLO1	Sponsor Sign-Off Form	
	CLO2	Customer Sign-Off Form	
	CLO3	Lessons Learnt Report	
	CLO3a	Lessons Learnt Log	
	CLO3b	Lessons Learnt Gathering Form	
	CLO3b	Facilitating Lessons Learned Sessions	
	CLO3c	Project Close-Out Report	
	CLO4	Close-Out Phase Checklist	
	CLO5		
7	Smaller Projects		
	SML1	Business Case for Smaller Projects	
	SML2	Project Charter for Smaller Projects	✓
	SML3	Project Plan for Smaller Projects	
	SML4	Change Request for Smaller Projects	
	SML5	Status Report for Smaller Projects	
	SML5	Lessons Learnt for Smaller Projects	
	SML6		