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## **1.0 PROJECT OVERVIEW**

### **1.1 PROJECT DESCRIPTION**

- Briefly describe what the project does.
- Discuss when and why project was started, and other relevant project background information, as applicable.
- Briefly describe key project initiatives and/or accomplishments

### **1.2 GOALS and OBJECTIVES**

*{Goals are broad; objectives are narrow. Goals are general intentions; objectives are precise.}*

#### **1.2.1 Project Goals**

- State project goals as bulleted list

#### **1.2.2 Outcomes, Objectives and Measures**

- Identify outcomes, objectives and measures the project supports.
- Cross reference to APGs where appropriate.
- Include any other project-specific objectives.

## **1.3 PROJECT AUTHORITY, GOVERNANCE and MANAGEMENT**

### **1.3.1 Project Authority**

- Describe project authority
- Use flowcharts, diagrams, as appropriate.

### **1.3.2 Governance Structure**

- Describe specific governance for project.  
Sample language: <<Project>> governance is through the management structure.

### **1.3.3 Management Structure**

- Describe lines of authority for project management. Include Project Manager, Local Project Coordinators, Outcome Manager, support staff, contractors, procurement office, and others, as appropriate.
- Discuss the role of the Project Coordinators and explain how Project Coordinators are identified.
- Briefly describe roles and responsibilities for individuals identified in the flow chart.
- Identify to whom each individual reports.
- Use flowcharts and diagrams as appropriate.

## **Roles and Responsibilities:**

### **Project Manager:**

- Perform project management and implementation functions, including overall management of activities performed
- Define performance targets for metrics;
- Coordinate project activities across multiple locations
- Engage project coordinators in strategic planning and implementation activities;
- Create integration activities with other <<program>> projects as well as <<program>> and <<program>> projects, as appropriate;
- Integrate project planning and direction; including pursuit of innovative partnerships and collaborations;
- Integrate budget and performance management;
- Manage grants and cooperative agreements;
- Monitor, assess and report project metrics, including evidence of achievement of performance goals and measures (output, outcome, efficiency);
- Update project snapshot on a predetermined basis;
- Participate in predetermined project status tag-up conducted with the budget office;
- Report significant project events through predetermined methods

### **Local Project Coordinators:**

The roles of the Local Project Coordinators are:

- Serve as the POC at home location for <<project>>;
- Participate in strategic planning and implementation of <<project>>;
- Tap needed local resources to support project activities;
- Facilitate two-way communication between management and project HQ;
- Communicate with stakeholders; and
- Manage Local procurement for project.

### **Outcome Manager:**

- Provide strategic direction for <<Program>> program, including program formulation and implementation, and portfolio balance;
- Maintain program level authority over budgets, schedules, and project labor;
- Review monthly project snapshots;
- Assess project compliance and performance against strategic objectives and stakeholder requirements and pursue corrective actions, where appropriate;
- Establish periodic reporting processes;
- Work across organizational lines to perform appropriate integration functions.

## 1.4 CUSTOMER and STAKEHOLDER DEFINITION

The primary stakeholder for <<project>> are:

### **Project Participants:**

- <<identify project participants>>

### **Project Stakeholders:**

- <<Identify Primary Stakeholders>>
- <<Identify collaborators>>
- <<Identify any other secondary stakeholders>>

### **External Partners and Collaborators:**

- List partners and collaborators

### **Other Agencies and/or Influences**

- Identify other Federal agencies or working groups with direct stake in project

<<Add other headings and stakeholders, as appropriate.>>

## 2.0 IMPLEMENTATION

### 2.1 APPROACH

- Briefly describe implementation approach, that is, how project accomplishes goals.

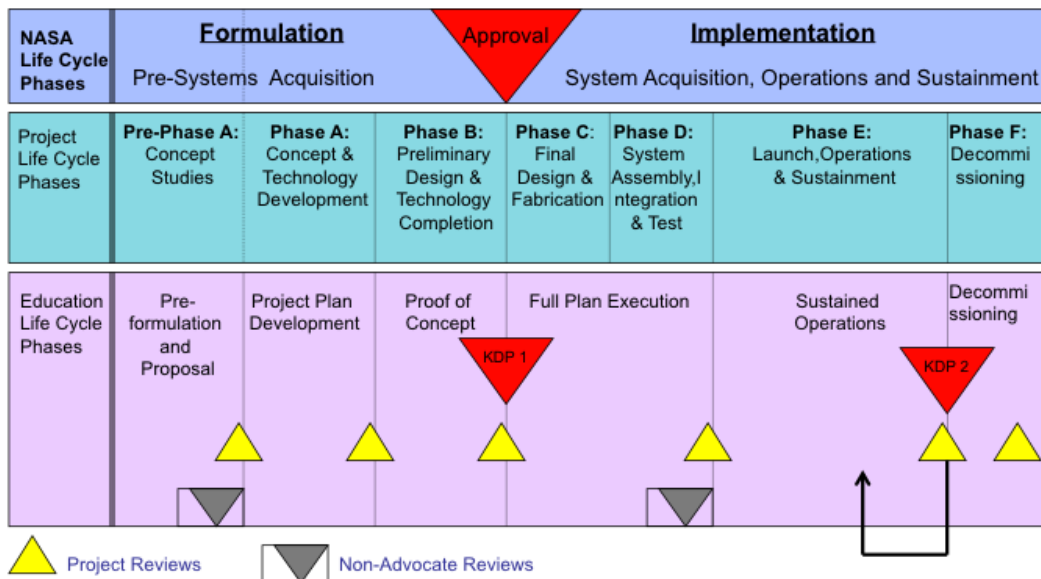
### 2.2 PROJECT LIFE CYCLE

*The project life cycle is an “ideal-typical” life cycle for any project. The ideal-typical life cycle identifies when specific events, including project level reviews, non-advocate reviews, and key decisions, occur. The project life cycle may be modified to meet the scope of a specific project. For example, a large, high-profile project may require several non-advocate reviews whereas a relatively small project may not require any non-advocate reviews.*

- Insert schematic of <<Project>> project life cycle, tailoring the life cycle to meet scope of project
- Identify and discuss the current phase of the life cycle the project is in, if assuming responsibility for existing project. Otherwise, identify and discuss the plan for each and all phases of the project life cycle.
- Include brief discussion of each of the reviews, specifically, how and when they are conducted.
- Briefly describe each phase of the life cycle as it relates to project.
- Include brief discussion of upcoming life cycle events and how they are handled.

BOILERPLATE EXAMPLE:

## Education Project Life Cycle



### 2.3 Internal Synergies

- Discuss project synergies within your organization
- Discuss push/pull plans with other projects.

### 2.4 External Synergies

- Discuss program and project synergies with other agencies, partners, international partners, studies, influences, etc.
- Identify mechanisms for collaboration (e.g., MOA, cooperative agreement, etc.)

### 2.5 Technology Plan

- Describe how project actively uses technology to meet project objectives including the use of technology for maximizing project efficiency, reducing project costs, facilitating reporting requirements, and supporting collaboration among customers and stakeholders, among others.

### 2.6 Communications Plan

- Describe communications pathways among partners and other relevant parties.
- Describe communication pathways among remote locations

### 2.7 Knowledge Capture and Dissemination

- Describe how project captures knowledge, uses lessons learned, and

contributes knowledge to the broader community and to other entities/programs/activities/federal agencies.

- Describe how <<project>> communicates importance of knowledge capture to awardees.
- Describe how knowledge gained is shared with any pertinent organizations

## **2.8 TERMINATION REVIEW CRITERIA**

<<Determine the criteria for terminating the project either when completed or prematurely>>

## **3.0 PROJECT BASELINE**

### **3.1 REQUIREMENTS BASELINE**

*{The purpose of this section is to define requirements needed to accomplish goals and to prevent additional requirements from being added that do not contribute to goals and may cause cost overruns.}*

- Describe project requirements.

### **3.2 WORK BREAKDOWN STRUCTURE (WBS) BASELINE**

BOILERPLATE:

WBS Number: <<project number>>

Breakout and detail of project workforce requirements

### **3.3 SCHEDULE BASELINE**

- Insert timeline of critical milestones, key events, and project-level reviews as an integrated master schedule. For each item in the master schedule, indicate the phase of the life cycle during which it occurs. Use charts and figures as appropriate.

### **3.4 RESOURCES BASELINE**

#### **3.4.1 Total Funding Requirements**

- Present total funding requirements for the duration of the project

#### **3.4.2 Labor, Procurement and Travel Requirements**

BOILERPLATE: Labor, procurement and travel requirements are captured in the project snapshot.

## **4.0 MONITORING and CONTROL**

### **4.1 PERFORMANCE MEASUREMENT**

#### **4.1.1 Monthly Project Update**

BOILERPLATE EXAMPLE: The <<project>> Project Manager updates the project snapshot monthly. The project snapshot captures critical milestones, planned versus actual obligations, and targeted versus actual performance data. After review by the project authority, Project Managers and OTHER officers tag-up with the budget office monthly via telecon to discuss obligation phasing status and any needed corrective actions.

#### **4.1.2 Quarterly Progress Review (if applicable)**

#### **4.1.3 Annual Performance Review**

#### **4.1.4 Project Specific Performance Assessment Activities (optional)**

- Describe any other performance assessment activities the project engages in other than those described elsewhere in Section 3.

### **4.2 STAKEHOLDER REPORTING**

- Describe stakeholder reporting requirements

### **4.3 REVIEW and EVALUATION**

#### **4.3.1 Outcome Level Review**

- Discuss how project supports appropriate outcome level review/s

#### **4.3.2 Project Evaluation**

- Describe how the overall project is evaluated

#### **4.3.3 Stakeholder Evaluation Requirements**

- Describe evaluation requirements placed on stakeholders

### **4.4 RISK MANAGEMENT PLAN**

BOILERPLATE EXAMPLE: <<Project name>> is a relatively low risk project. The primary risk is a reduction in budget.

- Describe how the project would adapt to a 15% and 25% budget reduction.
- Include impacts to labor, procurement, travel and schedule.

## 4.5 ACQUISITION PLAN

BOILERPLATE EXAMPLE: <<Project>> does not require any major acquisitions as part of the project. Contractor support, however, is needed as follows:

- Discuss how needed project acquisitions (e.g., contractor support) will be obtained, if applicable.

## 4.6 CHANGE MANAGEMENT

### 4.6.1 Revisions to Performance Targets

BOILERPLATE EXAMPLE: The <<project>> Project Manager, in coordination with the the <<Program>> Outcome Manager, identifies performance targets for metrics. Performance targets are finalized by <<identify when performance targets are due>>. The Project Manager must make a request to the project authority to revise stated performance targets and maintain record of confirmation

### 4.6.2 Project Plan Review

This <<project>> project plan is reviewed and updated at least <<insert time period>> after appropriations are made and intermittently as needed. The annual review and necessary revisions are captured on the Review, Revision and History page below.

The Project Manager initiates changes to this plan. Approval authority for changes that will impact the deliverables flows upward from the Project Manager to <<insert line of authority>>. Project Managers are to maintain records confirming approval for significant changes. The process of documenting and receiving approval for change is to help ensure the project meets timelines and to help ensure costs are not overrun because of changes to the Project Plan

## REVIEW, REVISION and HISTORY PAGE

Status	Revision No.	Description	Release / Review Date
Baseline	-	Approved for INTERNAL USE ONLY	MM/DD/2010
Review		No revisions required.	
Revision	A	Performance targets updated.	