**PROJECT MANAGEMENT PLAN**

Project title: Date Prepared:

Project life cycle:

|  |  |  |
| --- | --- | --- |
| Phase | key activities | key Deliverables |
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| --- | --- | --- | --- |
| Phase | reviews | entry criteria | exit criteria |
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Development approaches:

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| --- | --- |
| Deliverable | Development approach |
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Subsidiary Management Plans:

|  |  |
| --- | --- |
| name | comment |
| Scope |  |
| Time |  |
| Cost |  |
| Quality |  |
| Resource |  |
| Communications |  |
| Risk |  |
| Procurement |  |
| Stakeholder |  |
| Other Plans |  |

Page 1 of 2

**PROJECT MANAGEMENT PLAN**

variance thresholds:

|  |  |
| --- | --- |
| Scope variance threshold | Scope baseline Management |
| Schedule variance threshold | Schedule baseline Management |
| cost variance threshold | cost baseline Management |

baselines:

Attach all project baselines.

Page 2 of 2

**CHANGE MANAGEMENT PLAN**

Project title: Date Prepared:

change Management approach:

Definitions of change:

|  |
| --- |
| Schedule change: |
| Budget change: |
| Scope change: |
| Project document changes: |

change control board:

|  |  |  |  |
| --- | --- | --- | --- |
| name | role | responsibility | authority |
|  |  |  |  |
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change control Process:

|  |  |
| --- | --- |
| Change request submittal |  |
| Change request tracking |  |
| Change request review |  |
| Change request disposition |  |

Attach relevant forms used in the change control process.

Page 1 of 1

Approach

Waterfall phases.

**PROJECT ROADMAP**

Iterative development of content throughout Development, QC Edit, Exposure, and Finalization Phases.

Life Cycle Phases

Origination

Timeline

Project Origination Review

Sep 2

SME/MAG Review

Development

Standard

Finalized

QC and Edit

Exposure

Exposure Draft posted

Mar 14

Finalize

Consensus Body

Approval

3rd Quarter

Nov 12

1st Quarter 3rd Quarter 1st Quarter 3rd Quarter

Dec 11

Start

Jun 2 '14

Project Start Up

Jun 2 - Sep 2

Project Standard

Sep 2 '14 - Dec 27 '14

Exposure Jan 14 – Feb 13

Adjudicate and Appeals

Feb 14 – June 13

Knowledge Areasa

Dec 27 - Oct 28a

Guide QC and Edit

Nov 1 – Mar 1

Guide Exposure Draft

Mar 1 – Aug 1

QC and Finalize

Aug 1 – Oct 1

Front End Chapters 1-4a

Sep 2 - Mar 23a

Front End baselined

Mar 23

SME/MAG Review

Dec 27

SME/MAG Review

Jun 27a

Pre-Exposure Draft Vote

Oct 28

Exposure Complete Aug 1

Contingency

Oct 1 - Dec

31

QC Review

Sept 7

Project Target End Date

Dec 31 '16

Page 1 of 1

**SCOPE MANAGEMENT PLAN**

Project title: Date:

Work breakdown (WbS) Structure

WbS Dictionary

Scope baseline Maintenance

Deliverable acceptance

Scope and requirements integration

Page 1 of 1

**REQUIREMENTS MANAGEMENT PLAN**

Project title: Date:

collection:

analysis:

categories:

Documentation:

Prioritization:

Page 1 of 2

**REQUIREMENTS MANAGEMENT PLAN**

Metrics:

traceability Structure:

tracking:

reporting:

validation:

configuration Management:

Page 2 of 2

**REQUIREMENTS DOCUMENTATION**

Projecttitle: DatePrepared:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| iD | requirement | Stakeholder | category | Priority | acceptance criteria | testor verification | Phaseor release |
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Page1of1

**REQUIREMENTS TRACEABILITY MATRIX**

Projecttitle: DatePrepared:

|  |  |
| --- | --- |
| requirement information | relationship traceability |
| iD | requirement | Source | Priority | category | business objective | Deliverable | verification | validation |
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Page1of2

**INTER-REQUIREMENTS TRACEABILITY MATRIX**

Project title: Date Prepared:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| iD | business requirement | Priority | Source | iD | technical requirement | Priority | Source |
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Page 2 of 2

**PROJECT SCOPE STATEMENT**

Project title: Date Prepared:

Project Scope Description:

Project Deliverables:

Product acceptance criteria:

Project exclusions:

Page 1 of 2

**PROJECT SCOPE STATEMENT**

Project constraints

Project assumptions

Page 2 of 2

**WORK BREAKDOWN STRUCTURE**

Project title: Date Prepared:

1. Project

1.1. Major Deliverable

1.1.1. Control Account

1.1.1.1. Work Package

1.1.1.2. Work Package

1.1.1.3. Work Package

1.1.2. Work Package

1.2. Control Account

1.2.1. Work Package

1.2.2. Work Package

1.3. Major Deliverable

1.3.1. Control Account

1.3.1.1. Work Package

1.3.1.2. Work Package

1.3.1.3. Work Package

1.3.2. Control Account

1.3.2.1. Work Package

1.3.2.2. Work Package

Page 1 of 1

**WBS DICTIONARY**

Project title: Date Prepared:

|  |  |
| --- | --- |
| Work Package name: | code of accounts: |
| Description of Work: | assumptions and constraints: |
| Milestones:1.2.3. | Due Dates: |
| iD | activity | resource | labor | Material | total cost |
| hours | rate | total | units | cost | total |
|  |  |  |  |  |  |  |  |  |  |
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| quality requirements: |
| acceptance criteria: |
| technical information: |
| agreement information: |

Page 1 of 1

**SCHEDULE MANAGEMENT PLAN**

Project title: Date:

Schedule Methodology:

Scheduling tools:

level of accuracy: units of Measure: variance thresholds:

Schedule reporting and Format:

organizational Procedure links:

Schedule updates:

Page 1 of 1

**ACTIVITY LIST**

Project title: Date Prepared:

|  |  |  |
| --- | --- | --- |
| iD | activity | Description of Work |
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Page 1 of 1

62 Planning Forms

ork.

**ACTIVITY ATTRIBUTES**

Project title: Date Prepared:

|  |  |
| --- | --- |
| iD: | activity: |
| Description of Work: |
| Predecessors | relationship | lead or lag | Successor | relationship | lead or lag |
|  |  |  |  |  |  |
| number and type of team resources required: | Skill requirements: | required resources: |
| type of effort: |
| location of Performance: |
| imposed Dates or other constraints: |
| assumptions: |

Page 1 of 1

**MILESTONE LIST**

Project title: Date Prepared:

|  |  |  |
| --- | --- | --- |
| Milestone | Milestone Description | type |
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Page 1 of 1

**NETWORK DIAGRAM**

**Project Title: Date Prepared:**

B **+2d** D

**Start** A G

|  |  |  |
| --- | --- | --- |
|  | **FF** |  |
|  |  |

**FS-2d**

C E

|  |  |
| --- | --- |
|  |  |
| **SS** |  |
|  |  |

H I **End**

F

In this network diagram:

There is a two-day lead between the completion of A and beginning of C. There is a two-day lag between the completion of B and beginning of D. There is a start-to-start relationship between E and F.

There is a nish-to- nish relationship between G and H. All other relationships are nish-to-start.

Page 1 of 1

**DURATION ESTIMATES**

Project title: Date Prepared:

|  |  |  |  |
| --- | --- | --- | --- |
| iD | activity Description | effort hours | Duration estimate |
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Page 1 of 1

**DURATION ESTIMATING WORKSHEET**

Project title: Date Prepared:

|  |
| --- |
| Parametric estimates |
| ID | Effort Hours | ResourceQuantity | % Available | PerformanceFactor | DurationEstimate |
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|  |  |  |  |  |  |
| analogous estimates |
| ID | PreviousActivity | PreviousDuration | Current Activity | Multiplier | DurationEstimate |
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| three-Point estimates |
| ID | OptimisticDuration | Most LikelyDuration | PessimisticDuration | WeightingEquation | Expected Duration Estimate |
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Page 1 of 1

**PROJECT SCHEDULE**

SampleGanttChart

ID WBS TaskName Start Finish

August2008 September2008 October2008

4 7 10 13 16 19 22 25 28 31 3 6 9 12 15 18 21 24 27 30 3 6 9 12 15 18 21 24 27

1 **1 KitchenCabinets Aug4**

2 **1.1 Preparation Aug4**

3 1.1.1 Designkitchenlayout Aug4

4 1.1.2 Designcabinetlayout Aug6

5 1.1.3 Selectmaterials Aug13

6 1.1.4 Purchasematerials Aug18

7 1.1.5 Preparationcomplete Aug20

8 **1.2 Construction Aug21**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 9 | 1.2.1 | Buildcabinetframing | Aug21 | Sep10 |
| 10 | 1.2.2 | Stainand nishcabinetframing | Sep11 | Sep12 |
| 11 | 1.2.3 | Makecabinetdoors | Sep11 | Sep24 |
| 12 | 1.2.4 | Stainand nishdoors | Sep25 | Sep26 |
| 13 | 1.2.5 | Makedoors | Sep11 | Sep17 |
| 14 | 1.2.6 | Stainand nishdrawers | Sep18 | Sep18 |
| 15 | 1.2.7 | Makeshelving | Sep11 | Sep16 |
| 16 | 1.2.8 | Stainand nishshelving | Sep17 | Sep17 |
| 17 | 1.2.9 | Constructioncomplete | Sep26 | Sep26 |
| 18 | **1.3** | **Installation** | **Sep29** | **Oct2** |
| 19 | 1.3.1 | Installcabinetframing | Sep29 | Oct1 |
| 20 | 1.3.2 | Installcabinets | Oct2 | Oct2 |
| 21 | 1.3.3 | Installdrawers | Oct2 | Oct2 |
| 22 | **1.4** | **Signoff** | Oct2 | Oct2 |

**Oct2**

**Aug20**

Aug8

Aug12

Aug15

Aug20

Aug20

**Sep26**

**John**

**Mark**

**Judy**

**Mark**

**8/20**

**Mark**

**George**

**Mark**

**George**

**Mike**

**George**

**Jake**

**George**

**9/26**

**Mark Mark Mark**

**10/2**

Page1of2

**PROJECT SCHEDULE**

Sample Milestone Chart

ID Task Name Finish Qtr 2, 2008

Qtr 3, 2008 Qtr 4, 2008 Qtr

1 Vendors selected

2 Financing obtained

Mar 3

Mar 3

Mar Apr

3/3

3/3

May Jun Jul Aug Sep Oct Nov Dec Ja

3 Plans complete

4 Permits obtained

5 Paving complete

6

7

8

9

10

11

12

13

14

15

16

Apr 11

May 2

May 2

|  |  |  |
| --- | --- | --- |
| Foundation complete | May | 14 |
| House framed | Jun | 13 |
| Roof set | Jun | 20 |
| Power established | Jun | 20 |
| Power complete | Jul | 11 |
| Plumbing complete | Aug | 22 |
| HVAC complete | Aug | 22 |
| Finish work complete | Sep | 26 |
| Garden site prepared | Oct | 10 |
| City sign-off | Oct | 10 |
| Punch list closed | Oct | 17 |

4/11

5/2

5/2

5/14

6/13

6/20

6/20

7/11

8/22

8/22

9/26

10/10

10/10

10/17

Page 2 of 2

**COST MANAGEMENT PLAN**

Project title: Date Prepared:

|  |  |  |
| --- | --- | --- |
| units of Measure: | level of Precision: | level of accuracy: |
|  |  |  |

organizational Procedure links:

control thresholds:

rules of Performance Measurement:

cost reporting and Format:

additional Details:

Page 1 of 1

**ACTIVITY COST ESTIMATES**

**Project Title: Date Prepared:**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| WBSID | Resource | LaborCosts | PhysicalCosts | Reserve | Estimate | Method | Assumptions/Constraints | Basis of Estimates | Range | Con denceLevel |
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Page 1 of 1

**COST ESTIMATING WORKSHEET**

Project title: Date Prepared:

|  |
| --- |
| Parametric estimates |
| iD | cost variable | cost per unit | number of units | cost estimate |
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  |  |  |  |
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| analogous estimates |
| iD | Previous activity | Previous cost | current activity | Multiplier | cost estimate |
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| three-Point estimates |
| iD | optimistic cost | Most likely cost | Pessimistic cost | Weighting equation | expected cost estimate |
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Page 1 of 2

**BOTTOM-UP COST ESTIMATING WORKSHEET**

Project title: Date Prepared:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| iD | labor hours | labor rate | total labor | Material | Supplies | equipment | travel | other Direct costs | indirect costs | reserve | estimate |
|  |  |  |  |  |  |  |  |  |  |  |  |
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Page 2 of 2

**COST BASELINE**

**Project Title:**

14,000

12,000

10,000

8,000

6,000

4,000

2,000

**Date Prepared:**

0

1 2 3 4 5 6 7

Page 1 of 1

**QUALITY MANAGEMENT PLAN**

Project title: Date Prepared:

quality Standards

quality objectives

|  |  |
| --- | --- |
| Metric or Specification | Measure |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |

quality roles and responsibilities

|  |  |
| --- | --- |
| roles | responsibilities |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |

Page 1 of 2

**QUALITY MANAGEMENT PLAN**

Deliverables and Processes Subject to quality review

|  |  |
| --- | --- |
| Deliverables | Processes |
|  |  |

quality Management approach

quality control approach

applicable quality Procedures

Page 2 of 2

**QUALITY METRICS**

Project title: Date Prepared:

|  |  |  |  |
| --- | --- | --- | --- |
| iD | item | Metric | Measurement Method |
|  |  |  |  |
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Page 1 o

**RESPONSIBILITY ASSIGNMENT MATRIX**

Project title: Date Prepared:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Person 1 | Person 2 | Person 3 | Person 4 | etc. |
| Work package 1 | r | c | a |  |  |
| Work package 2 |  | a |  | i | r |
| Work package 3 |  | r | r | a |  |
| Work package 4 | a | r | i | c |  |
| Work package 5 | c | r | r |  | a |
| Work package 6 | r |  | a | i |  |
| Etc. | c | a |  | r | r |

r = Responsible: The person performing the work.

c = Consult: The person who has information necessary to complete the work.

a = Accountable: The person who is answerable to the project manager that the work is done on time, meets requirements, and is acceptable.

i = Inform: This person should be noti ed when the work is complete.

Page 1 of 1

104 Planning Forms

**RESOURCE MANAGEMENT PLAN**

Project title: Date Prepared:

team Member identification and estimates

|  |  |  |
| --- | --- | --- |
| role | number | Skill level |
| 1.2.3.4.5.6. | 1.2.3.4.5.6. | 1.2.3.4.5.6. |

Staff acquisition Staff release:

roles, responsibilities, and authority

|  |  |  |
| --- | --- | --- |
| role | responsibility | authority |
| 1.2.3.4.5.6. | 1.2.3.4.5.6. | 1.2.3.4.5.6. |

Project organizational Structure

**RESOURCE MANAGEMENT PLAN**

training requirements

rewards and recognition

team Development

Physical resource identification and estimates

|  |  |  |
| --- | --- | --- |
| resource | amount | grade |
| 1.2.3.4.5.6. | 1.2.3.4.5.6. | 1.2.3.4.5.6. |

resource acquisition

resource Management

Page 2 of 2

**TEAM CHARTER**

Project title: Date Prepared:

team values and Principles:

1.

2.

3.

4.

5.

Meeting guidelines:

1.

2.

3.

4.

5.

communication guidelines:

1.

2.

3.

4.

5.

Decision-Making Process:

Page 1 of 2

**TEAM CHARTER**

conflict resolution Process:

other agreements:

Signature: Date:

Page 2 of 2

**RESOURCE REQUIREMENTS**

Project title: Date Prepared:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| iD | resource | quantity | assumptions | comments |
|  |  |  |  |  |
|  |  |  |  |  |
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Page 1 of 1

**RESOURCE BREAKDOWN STRUCTURE**

Project title: Date Prepared:

1. Project

1.1. People

1.1.1. Quantity of Role 1

1.1.1.1. Quantity of Level 1

1.1.1.2. Quantity of Level 2

1.1.1.3. Quantity of Level 3

1.1.2. Quantity of Role 2

1.2. Equipment

1.2.1. Quantity of Type 1

1.2.2. Quantity of Type 2

1.3. Materials

1.3.1. Quantity of Material 1

1.3.1.1. Quantity of Grade 1

1.3.1.2. Quantity of Grade 2

1.4. Supplies

1.4.1. Quantity of Supply 1

1.4.2. Quantity of Supply 2

1.5. Locations

1.5.1. Location 1

1.5.2. Location 2

Page 1 of 1

**COMMUNICATIONS MANAGEMENT PLAN**

Project title: Date Prepared:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Stakeholder | information | Method | timing or Frequency | Sender |
|  |  |  |  |  |
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|  |  |
| --- | --- |
| assumptions | constraints |
|  |  |
|  |  |
|  |  |
|  |  |

glossary of terms or acronyms:

attach relevant communication diagrams or flowcharts.

Page 1 of 1

**RISK MANAGEMENT PLAN**

Project title: Date Prepared:

Strategy

Methodology

roles and responsibilities

|  |  |
| --- | --- |
| role | responsibility |
| 1.2.3.4. | 1.2.3.4. |

risk categories

risk Management Funding

contingency Protocols

Page 1 of 4

**RISK MANAGEMENT PLAN**

Project title: Date Prepared:

Frequency and timing

Stakeholder risk tolerances

risk tracking and audit

Page 2 of 4

**RISK MANAGEMENT PLAN**

Definitions of Probability

|  |  |
| --- | --- |
| very high |  |
| high |  |
| Medium |  |
| low |  |
| very low |  |

Definitions of impact by objective

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Scope | quality | time | cost |
| very high |  |  |  |  |
| high |  |  |  |  |
| Medium |  |  |  |  |
| low |  |  |  |  |
| very low |  |  |  |  |

Page 3 of 4

**RISK MANAGEMENT PLAN**

Probability and impact Matrix

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| very high |  |  |  |  |  |
| high |  |  |  |  |  |
| Medium |  |  |  |  |  |
| low |  |  |  |  |  |
| very low |  |  |  |  |  |
|  | very low | low | Medium | high | very high |

Page 4 of 4

**RISK REGISTER**

Project title: Date Prepared:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| iD | risk Statement | owner | Probability | impact | Score | response |
| Scope | quality | Schedule | cost |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| revisedProbability | impact | revisedScore | responsibleParty | actions | Status | comments |
| Scope | quality | Schedule | cost |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
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Page 1 of 1

**RISK REPORT**

Project title: Date:

executive Summary

overall Project riSk

overall risk Status and trends

Significant Drivers of overall risk recommended responses

inDiviDual Project riSkS

indicate the number of individual risks in each box below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| VH |  |  |  |  |  |
| H |  |  |  |  |  |
| M |  |  |  |  |  |
| L |  |  |  |  |  |
| VL |  |  |  |  |  |
|  | VL | L | M | H | VH |

Page 1 of 4

**RISK REPORT**

Metrics

|  |  |
| --- | --- |
| Number of scope risks |  |
| Number of schedule risks |  |
| Number of cost risks |  |
| Number of quality risks |  |
| Number of very high probability risks |  |
| Number of high probability risks |  |
| Number of medium probability risks |  |
| Number of active risks |  |
| Newly closed risks |  |

critical risks

|  |  |
| --- | --- |
| Top Risks | Responses |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |
| 5. | 5. |

changes to critical risks

Page 2 of 4

**RISK REPORT**

quantitative analysis Summary

Probability of Meeting objectives:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Scope | Schedule | Cost | Quality | Other |
|  |  |  |  |  |

range of outcomes

|  |  |
| --- | --- |
| Range of Schedule Outcomes | Range of Cost Outcomes |
|  |  |

|  |  |
| --- | --- |
| Key Drivers of Variances | Proposed Responses |
|  |  |

reserve Status

|  |  |  |  |
| --- | --- | --- | --- |
| Total Cost Reserve | Used to Date | Used This Period | Remaining Reserve |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Total Schedule Reserve | Used to Date | Used This Period | Remaining Reserve |
|  |  |  |  |

Page 3 of 4

**RISK REPORT**

assessment of reserve adequacy

risk audit Summary

|  |  |
| --- | --- |
| Summary of Risk Events |  |
| Summary of Risk Management Processes |  |
| Summary of Recommendations |  |

Page 4 of 4

**PROBABILITY AND IMPACT RISK RATING**

Project title: Date Prepared: Scope impact

|  |  |
| --- | --- |
| Very High |  |
| High |  |
| Medium |  |
| Low |  |
| Very Low |  |

quality impact

|  |  |
| --- | --- |
| Very High |  |
| High |  |
| Medium |  |
| Low |  |
| Very Low |  |

Schedule impact

|  |  |
| --- | --- |
| Very High |  |
| High |  |
| Medium |  |
| Low |  |
| Very Low |  |

Page 1 of 2

**PROBABILITY AND IMPACT RISK RATING**

cost impact

|  |  |
| --- | --- |
| Very High |  |
| High |  |
| Medium |  |
| Low |  |
| Very Low |  |

Probability

|  |  |
| --- | --- |
| Very High |  |
| High |  |
| Medium |  |
| Low |  |
| Very Low |  |

risk rating

|  |  |
| --- | --- |
| High |  |
| Medium |  |
| Low |  |

Page 2 of 2

**PROBABILITY AND IMPACT MATRIX**

**Project Title: Date Prepared:**

**Very Low**

**Low**

**Medium**

**High**

**Very High**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Very Low Low Medium High Very High**

Page 1 of 1

**RISK DATA SHEET**

Project title: Date Prepared:

|  |  |
| --- | --- |
| risk iD: | risk Description: |
| Status: | risk cause: |
| Probability | impact | Score | responses |
| Scope | quality | Schedule | cost |
|  |  |  |  |  |  |  |
| revisedProbability | revised impact | revisedScore | responsibleParty | actions |
| Scope | quality | Schedule | cost |
|  |  |  |  |  |  |  |  |
| Secondary risks: |
| residual risk: |
| contingency Plan: | contingency Funds: |
| contingency time: |
| Fallback Plans: |
| comments: |

Page 1 of 1

that will be used.**PROCUREMENT MANAGEMENT PLAN**

Project title: Date:

Procurement integration

|  |  |
| --- | --- |
| area | integration approach |
| Scope |  |
| Schedule |  |
| Documentation |  |
| Risk |  |
| Reporting |  |

timing of key Procurement activities

|  |  |
| --- | --- |
| Date | activity |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Performance Metrics

|  |  |  |
| --- | --- | --- |
| item | Metric | Measurement Method |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Page 1 of 2

**PROCUREMENT MANAGEMENT PLAN**

roles, responsibility, and authority

|  |  |  |
| --- | --- | --- |
| role | responsibility | authority |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

assumptions and constraints

|  |  |
| --- | --- |
| category | assumption/constraint |
|  |  |
|  |  |
|  |  |
|  |  |

legal jurisdiction and currency

independent estimates

risk Management

Prequalified Sellers

1.

2.

3.

4.

Page 2 of 2

**PROCUREMENT STRATEGY**

Project title: Date:

Delivery Method

contract type

 FFP FPIF FP-EPA CPFF CPIF CPAF T&M Other

|  |  |
| --- | --- |
| incentive or award Fee | criteria |
|  |  |
|  |  |
|  |  |
|  |  |

Procurement life cycle

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Phase | entry criteria | key Deliverables or Milestones | exit criteria | knowledge transfer |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
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Page 1 of 1

**SOURCE SELECTION CRITERIA**

Project title: Date Prepared:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 1 | 2 | 3 | 4 | 5 |
| criterion 1 |  |  |  |  |  |
| criterion 2 |  |  |  |  |  |
| criterion 3 |  |  |  |  |  |
| criterion 4 |  |  |  |  |  |
| criterion 5 |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Weight | candidate 1 rating | candidate 1Score | candidate 2 rating | candidate 2Score | candidate 3 rating | candidate 3Score |
| criterion 1 |  |  |  |  |  |  |  |
| criterion 2 |  |  |  |  |  |  |  |
| criterion 3 |  |  |  |  |  |  |  |
| criterion 4 |  |  |  |  |  |  |  |
| criterion 5 |  |  |  |  |  |  |  |
| totals |  |  |  |  |  |  |  |

Page 1 of 1

**STAKEHOLDER ENGAGEMENT PLAN**

Project title: Date Prepared:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Stakeholder | unaware | resistant | neutral | Supportive | leading |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |

C = Current level of engagement D = Desired level of engagement

Pending Stakeholder changes

Stakeholder relationships

Page 1 of 2

**STAKEHOLDER ENGAGEMENT PLAN**

Stakeholder engagement approach

|  |  |
| --- | --- |
| Stakeholder | approach |
|  |  |
|  |  |
|  |  |
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Page 2 of 2