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| Organisation [Name] |
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| **<Project Handbook>** |
| **<Project Name>** |
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| Date: <Date> |
| Doc. Version: <Version> |
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This artefact template is aligned with the PM² Guide V3.0

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# About the Project Handbook

The *Project Handbook* documents the selected approach for implementing the project goals. It also highlights the key controlling processes to be used, the project policies and rules, and the overall management approach. *<The project scope statement (from the Project Charter) is a key input for this document.>*

The *Project Handbook* is an important document since it defines the outputs of the planning (i.e. it defines the plans necessary for managing the project as well as to what extent they should be customize or/and tailored).

The *Project Handbook* becomes the basis for managing the project throughout its lifecycle and is an important point of reference for all project members and stakeholders. The *Project Handbook* is kept up to date throughout the life of the project. During the Closing Phase, the *Project Handbook* becomes an important point of reference for the Project-End Review Meeting, and should be properly closed and archived.

# Project Overview

## Project summary

*<In this section, you can provide an executive summary of the project or simply provide links to the Business Case and the Project Charter documents.*

## Critical Success Factors and Project Management Objectives

*<This section is optional but very useful.>*

**Critical Success Factors**

*<Highlight in this section those factors that are critical for the success of the project and which can also result in additional project management objectives. By identifying such Critical Success Factors (CSF), the project management team can focus their management efforts on those factors that contribute the most towards project success>.*

*<Examples of Critical Success Factors (CSF) are, stakeholder involvement, management support, clear business objectives and expectations, Agile process, shared project management methodology, tools and infrastructure, etc.>.*

**Additional Project Management Objectives**

*< Additional project management objectives go beyond the main project scope and the generic/traditional project management objectives. However, they remain relevant to the specific project or overall programme/organizational context. They define specific project management objectives, such as organizational and team learning/development objectives, organizational maturity objectives, sustainability and environmental objectives, etc.*

*Additional objectives should be defined, managed and prioritized in a way that they maximize the overall project benefit to the organization and the project team, but without imposing any additional constraints or significant additional costs or effort to the project. In other words, they influence the overall approach of planning and implementation of the main project scope/deliverables, but no project work items directly derive from these objectives.*

*It is easy to see, for example, that many of the PM2 Mindsets (found in the PM2 Guide) can be directly or indirectly connected or translated to an additional objective.*

*The additional objectives should be discussed and agreed with the project team during the planning phase and approved by the Project Steering Committee (as part of the overall Project Handbook approval).>*

## Project Stakeholders

*<Provide a brief summary of the most important project stakeholders/users, or simply reference the Stakeholder Matrix for a detailed list of all the involved people in this project.>*

## Project Dependencies or Interrelations

*<Identify any dependencies or interrelations of this project with other work or projects that has/is/will be undertaken, or with other problems or solutions. For example, the project may be part of a programme or a network of projects each contributing towards a common goal.*

*Identifying and documenting these dependencies can influence the project management priorities, the management approach, can results additional objectives, or simply result in constraints and/or risks.>*

## Project Constraints

*<Identify any constraints associated with the planning, executing, monitoring & controlling and closing of the project, or simply reference the relevant sections in the Business Case and Project Charter.*

*In this context, constraints are factual conditions that limit the ways that project work can be defined, planned, executed and controlled. Project teams need to acknowledge, understand and work around the project constraints.*

*The project's obvious "triple constraint" (i.e. time, cost, scope) can also be mentioned here, particularly if there are cost, time and scope "inflexibilities" (i.e. fixed cost, fixed/unmovable delivery/launch dates, etc.).*

*Constraints may be related to the collection of requirements (e.g. from different countries or User Groups), contractors, staff, time/timing, technologies, tools, decision cycles or any other aspects of the project.*

*Examples of possible project constraints are: specific legal or internal process requirements that the project needs to follow (e.g. specific type of tendering process), environmental constraints, constraints related to physical characteristics for example of a work space, the security clearance or mandatory qualifications/certifications of team members or contractors, etc.*

*Particular attention should be given to constraints that need to be considered in order to start the planning and executing of the project and achieve the project goals.>*

# Project Approach

## Project Lifecycle

*<Present the project management lifecycle (phases) to be used in the project and how the project will move forward from one phase to the next (i.e. the planned approvals or gates), and describe any deviations from the standard PM2 project management lifecycle.*

*If applicable to your project, you can also define any planned work-stages or iterations and described the planned approach and key stage/iteration outputs.>*

## PM² Tailoring – Required Project Documentation

*<Determine which project management plans are necessary for the project. The complexity of the project, the possible risks and the Project Steering Committee influence this decision. Use the list below or/and add/delete items in the list as per your project's needs.>*

|  |  |  |  |
| --- | --- | --- | --- |
| **Artefact** | **Yes/No** | **Location** | **If No, briefly explain the reason** |
| Project Initiation Request | x |  |  |
| Business Case | 🗸 |  |  |
| Project Charter | 🗸 |  |  |
| Project Handbook (this document) | 🗸 | *<H:\ProjectXYZ\Planning\ProjectHandbook.[ProjectName].[1-02-2017].docx>* |  |
| Stakeholder Matrix |  |  |  |
| Project Work Plan |  |  |  |
| Transition Plan |  |  |  |
| Other… |  |  |  |

## Other Standards

*<Define any other methodologies specific to the project's domain (e.g. Agile for IT projects) or* *standards that have to be considered for the planning and application of PM2 processes.>*

Additionally to PM2, the project will follow other (domain specific) methodologies as described below:

* Agile for the management of IT development;
* ….

*<Customise the above list as per your project or/and organization needs.>*

The following standards were considered when defining project approach:

* ….

*<Complete the above list as per your project or/and organization needs.>*

## Specific Project Management Rules

*<Define any specific project management rules that will be applied in the project. The purpose of documenting project rules is to establish an agreeable set of "rules of conduct" that will facilitate the better management and execution of the project.*

*Project rules are usually related to defining rules regarding stakeholder/team interactions, communication, meetings, collaboration, contractors, etc., and especially those aspects which cannot be easily covered by the project methodology, communication plan, meeting and reporting templates, or which are very specific chosen project management style.*

*Project rules can be related to the specific project or overall programme/organizational context, or/and can be derived directly from the project's critical success factors, project management objectives and the PM2 Mindsets (found in the PM2 Guide).*

*Inputs (information) that can be used to define the project rules are: the MoMs of the Project Planning Kick-off Meeting, "pre-project" information, and lessons learned from projects with similar scope, constraints or risks, etc.>*

## Conflict Resolution and Escalations

*<In this section the conflict resolution process for the project is defined. At the time of the conflict, the team can either effectively resolve it or escalate if necessary.*

*Typically, conflict can arise in any of the levels below:*

* *Within the Project Core Team;*
* *Within a specific domain (e.g. the IT Community);*
* *With the client/requestor side or the user community;*
* *With a Contractor.>*

Conflicts are situations in which one or both parties perceive a threat. They are considered to be critical issues and can be raised by any of the project stakeholders. The Project Management team should proactively identify, log and raise such issues for resolution. When required, conflicts are discussed on the weekly Project Status Meetings or, if needed, escalated to the Project Steering Committee (PSC).

Conflict resolution activities are registered in the *Issue Log*, while conflict resolution decisions can be logged in the *Decision Log*.

The escalation procedure for this project is as following:

* Only issues/changes/risks with Very Low and Low impact can be approved by the Project Core Team (PCT). In this case, the Project Manager (PM) must always be informed and decisions may be registered in the Decision Log;
* Issues/changes/risks with Medium impact are approved by the Managing Level (Project Manager and Business Manager) during the weekly Project Status Meetings. Decisions are registered in the Decision Log;
* Issues/changes/risks with High and very High impact are approved by the Project Steering Committee (PSC). Decisions are registered in the Decision Log;
* When relevant, the Project Steering Committee (PSC) has extraordinary meetings for approving remediation actions related to urgent or very urgent issues with considerable impact or size.

*<Customise the above process as per your project or/and organization needs.>*

# Project Processes

## Risk Management

*<This is a high level description of the risk management process to be used, which can be customized to the specific project and organizational context as necessary. Consider creating a separate more extensive project's Risk Management Plan for large, complex projects. (See the PM² Risk Management Plan* template*)>*

The project risk management process defines the activities to identify, assess, prioritise, manage and control risks that may affect the execution of the project and the achievement of its outputs. This is a four step process:

* **Risk Identification:** risks are continuously identified throughout the project lifecycle by any project stakeholder and documented in the Risk Log (by any project team member).
* **Risk Assessment:** risks are assessed based on their likelihood of occurrence and the impact in project scope and constraints. The product of their likelihood and impact (in 5 point scales) defines the Risk Level which is then used as a reference for their prioritisation and risk response development.
* **Risk Response Development:** there are four strategies to be considered as risk responses to threats: Avoid, Transfer, Reduce or Accept a risk. After the strategy for each risk has been selected, specific actions to implement the strategy will be defined, described, scheduled and assigned, while a Risk Owner assumes the responsibility for its implementation. These actions will be incorporated into the Project Work Plan.
* **Risk Control:** the Project Status Meetings are used to revise the status of risks, probabilities and impacts, and related actions, and to identify new risks. Risks will be revised weekly, but also after the occurrence of any significant event. If any of the identified risks occur, then the Project Manager (PM) will implement the contingency plans and communicate the issue to the Project Steering Committee (PSC).

*<Customise the above process as per your project or/and organization needs.>*

## Issue Management

*<This is a high level description of the project issue management process to be used, which can be customised to the specific project and organizational context. Consider creating a separate more extensive project's Issue Management Plan for large, complex projects. (see the PM² Issue Management Plan* template*)>*

The project issue management process defines the activities related to identifying, documenting, assessing, prioritizing, assigning, resolving and controlling issues. It is a four step process that the Project Manager (PM) executes whenever required throughout the project lifecycle:

* **Issue Identification:** Issues can be identified by any project stakeholder throughout the project lifecycle, using different communication channels such as meetings, emails, and reports. The issues are registered in the Issue Log.
* **Issue Assessment and Action Recommendation**: a first informal assessment considers the category, impact, urgency and size of the issue, followed by a more detailed analysis to identify the root cause and recommend a solution. This information is documented in the Issue Log and used as input to the appropriate decision makers (based on the escalation process). The decision is documented in the Decision Log.
* **Actions Implementation:** After issues are evaluated and the remediation actions approved, the Project Manager (PM) will incorporate these actions into the Project Work Plan and update project related documentation such as project plans and logs
* **Issue Control:** Project Status meetings will be performed weekly and used to revise the status of issues and related actions, and to identify new issues. Additionally, the Project Manager (PM) will report monthly the status of the major issues to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders

*<Customise the above process as per your project or/and organization needs.>*

## Requirements Management

*<This is a high level description of the requirements management process to be used, which can be customised to the specific project and organizational context. Consider creating a separate more extensive Requirements Management Plan for large, complex projects. (see the PM² Requirement management Plan* template*)>*

The requirements management process comprises the activities related to the specification, evaluation, approval, monitoring and validation of the project's requirements. This process consists of the following steps:

* **Specify Requirements:** gather the project requirements together with the project stakeholders and document them unambiguously in the Requirements Document. Structure them by adding relevant metadata.
* **Evaluate Requirements:** the project team assesses the feasibility of the requirements and estimates the costs to realise them. The Project Manager (PM) balances the list of requirements with the other project constraints (budget, time, etc.) and proposes them to the project stakeholders.
* **Approve Requirements:** the Project Manager (PM) negotiates and agrees the requirements that will be realized during the project with the relevant stakeholders, such as the Project Owner (PO) or the Business manager (BM). The approved requirements become the baseline of the project scope.
* **Monitor Requirements Implementation:** the Project Manager (PM) continuously monitors the implementation of the requirements by the Project Core Team (PCT), besides the discovery of new requirements or changes to existing requirements.
* **Validate Implemented Requirements:** when the requirements are implemented the solution is validated by the business user in order to assess if the initial business need is satisfied. Formal acceptance of the project deliverables should comply to the Deliverables Acceptance Management process.

*<Customise the above process as per your project or/and organization needs.>*

## Project Change Management

*<This is a high level description of the project change management process to be used, which can be customised to the specific project and organizational context. Consider creating a separate more extensive Project Change Management Plan for large, complex projects. (see the PM² Project Change Management Plan* template*)>*

The project change management process defines the activities related to identifying, documenting, assessing, approving, prioritising, planning and controlling changes, and communicating them to all relevant stakeholders. It is a five step process that the Project Manager (PM) executes whenever required throughout the project lifecycle:

* **Change Identification:** a request for a change can be submitted formally via a Change Request Form, or can be identified and raised during meetings as a result of decisions, issues or risks. The *Change Log* contains information to identify the change, such as the requestor, a short description, identification date, etc.
* **Change Assessment and Action Recommendation**: the size and impact of the change on the project scope, schedule, cost, quality, risk, and other project boundaries is assessed, where after a recommended action will be documented by the Project Manager (PM) in the *Change Log*., This information is then used as an input to the formal change approval by the appropriate decision makers.
* **Change Approval:** the approval of a project change will follow the defined escalation process for this project. For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Status Meetings. Other changes (having a size L or XL) are approved by the Project Steering Committee (PSC). The decision details are documented in the *Change Log*.
* **Change Implementation:** the activities related to the implementation of approved changes will be documented in the *Project Work Plan*.
* **Change Control:** new or open changes will be identified/reassessed weekly during the Project Status Meetings and the Project Manager (PM) will then update the *Change Log* with the results of the analysis/review. For the Medium, High and Very High size changes, the Project Manager (PM) will report on a monthly basis their status to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders.

*<Customise the above process as per your project or/and organization needs.>*

## Quality Management

*<This is a high level description of the quality management approach to be used, which can be customised to the specific project and organizational context. Consider creating a separate more extensive Quality Management Plan for large, complex projects. (See the PM² Quality Management Plan* template*)>*

The project quality management process comprises all activities (related both to processes and deliverables) that will increase the ability to meet the project expected results identified in the *Project Charter*. The process is comprised of five steps:

* **Define Quality Characteristics:** identify the objectives, approach, requirements, activities and responsibilities of the project's quality management process and how it will be implemented throughout the project. Quality management activities will be added to the *Project Work Plan*. The *Quality Review Checklist* and *Deliverables Acceptance Checklist* are created during the Planning phase.
* **Perform Quality Assurance:** the quality assurance activities will be performed by evaluating the design of project controls, by confirming that they are implemented, and by assessing their operational effectiveness.

These activities will consider the project quality objectives along with the project risks. In addition, quality assurance validates compliance with the organisation’s rules and regulations, as well as with relevant governmental and industry rules, regulations and legislation. Quality assurance activities will be performed by a Project Quality Assurance (PQA) person, and by the project organization (PCT, BM, SP).

* **Perform Quality Control:** the *Quality Review Checklist* will be used by the Project Manager (PM) for evaluating the quality control activities and to validate compliance with the plans in terms of scope, time, cost, quality, project organization, communication, risks, contracts, and client satisfaction. Additionally, the Project Manager (PM) will summarize and document the *Quality Review Checklist* findings, their impact, recommendations along with any remediation/improvement actions. The project logs will then also be used to document related risks, issues, decisions and changes.
* **Perform Deliverables Acceptance** (see also section 4.8)**:** the Deliverables Acceptance Checklist supports the monitoring of the status of all activities that are pre-condition to the delivery of project outputs to the Project Owner (PO) and their formal acceptance. Project deliverables are accepted if the acceptance activities are successfully performed and within the pre-specified tolerances. The project deliverables may be conditionally accepted even with a set of known issues, provided that these are documented and that there is a plan for addressing them.
* **Perform Final Acceptance:** the Project Manager (PM) will report on project performance in the Project-End Review Meeting and develop the *Project-End Report*. The project documentation and records will be updated, reviewed and archived. The final acceptance is obtained from the Project Owner (PO), through the Project Acceptance Note, where after the project end is communicated to all relevant stakeholders.

*<Customise the above process as per your project or/and organization needs.>*

## Configuration Management

*<This is a high level description of the configuration management approach to be used, which can be customised to the specific project and organizational context. For large or complex projects, consider integrating this plan into a separate more extensive Quality Management Plan. (See the PM² Quality Management Plan* template*)>*

The project configuration management procedure comprises the identification of project configuration items (CIs), their attributes and status codes, the establishment of baselines, the definition of roles and responsibilities for authorised changes to CIs, and the maintenance and control of a project repository.

**Storage of project management artefacts**

The Project Manager (PM) will structure the project management artefacts per PM2 phase, following the below folder convention:

* 01 Initiating
* 02 Planning
* 03 Executing
* 04 Monitor & Control
* 05 Closing

**Naming convention of project management artefacts**

The following artefact naming convention will be used:  
(XX).(DocumentName).(ProjectName).(yyyy-mm-dd).v(x.x), where:

* (XX) (two numerical characters) unique artefact number within the folder indicating the artefact sequence.
* v(x.x) indicates the artefact version. Version numbers like "0.x" mean that the document hasn't been approved yet; minor changes will be reflected in the decimal (revisions number) and major changes (formal reviews) in the version number.

**Versioning of project management artefacts**

All project management artefacts are under version control, except for the project logs and checklists.

## Communications Management

*<This is a high level description of the communications management approach to be used, which can be customised to the specific project and organizational context. Consider creating a separate more extensive Communication Management Plan for large, complex projects. (See the PM² Communication Management Plan* template*)>*

The communications management process determines how to communicate most efficiently and effectively to the various stakeholders. It defines and documents the communication items content, format, frequency, the audience and expected results. It also defines how to communicate project status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations and influence in the project.

The following project meetings will be organised:

|  |  |  |
| --- | --- | --- |
| **Meeting** | **Chair** | **Frequency** |
| Planning Kick-off Meeting | Project Manager (PM) | Once |
| Executing Kick-off Meeting | Project Manager (PM) | Once |
| Project Status Meeting | Project Manager (PM) | Every 2 weeks |
| Project Core Team Meeting | Team Leader (TL) | Weekly |
| Project Review Meeting | Project Manager (PM) | Bi-annually |
| Project Steering Committee Meeting | Project Owner (PO) | Monthly |
| Change Control Meeting | Project Manager (PM) | Ad Hoc |
| Project-End Review Meeting | Project Manager (PM) | Once |

The following project reports will be delivered:

|  |  |  |
| --- | --- | --- |
| **Report** | **Responsible** | **Frequency** |
| Project Status Report | Project Manager (PM) | With Status meeting |
| Project Progress Report | Project Manager (PM) | With Project Review Meeting |
| Quality Review Report | Project Manager (PM) | Quarterly |
| Outsourcing (Contractor) Status Report | Contractor | Monthly |
| Project-End Report | Project Manager (PM) | With Project-End Review |

*<Customise the above process as per your project or/and organization needs.>*

## Deliverables Acceptance Management

*<Present a high level summary of the deliverables acceptance management approach to be used, in order to guarantee a formal process for client deliverable acceptance or/and simply provide a link to the project's Deliverable Acceptance Plan.>*

The quality management process comprises the activities related to deliverables acceptance, in order to increase the ability to meet the project’s acceptance criteria. This process consists of three steps:

* **Define Acceptance Criteria:** define the acceptance criteria for each one of the project deliverables. This information is derived from project scope, approach, requestor needs, deliverables, expected benefits and requirements (as defined in the *Business Case*, *Project Charter*, *Project Handbook*, *Project Work Plan*, Requirements documentation and other relevant documents).
* **Perform Acceptance Activities:** verify if the deliverables comply with the acceptance criteria. The deliverables acceptance activities are detailed and scheduled in the *Project Work Plan*.
* **Perform Deliverables Acceptance (provisional/final):** obtain formal approval from the Project Owner (PO) for each project deliverable. The provisional/final acceptance should be documented in the Deliverables Acceptance Note. Project deliverables are accepted if the acceptance activities (as described in this plan) are successfully performed and within the pre-specified metrics, tolerances and timeframe. Project deliverables may be provisionally accepted by an expert/user in the concerned acceptance domain, even with a limited set of non-critical issues, provided that these are documented, agreed by the relevant stakeholders, and that there is a plan for addressing them. The rejection of deliverables will follow the project issue management process. After the resolution of the issues, deliverables are re-tested and submitted again for approval.

*<Customise the above process as per your project or/and organization needs.>*

## Transition Management

*<Present a high level summary of the transition management approach to be used in order to guarantee the successful transition from the current state to the new desired state, with clear considerations to minimizing disruptions in operations, or/and simply provide a link to the project's Transition Plan.>*

The transition management process comprises the activities related to ensure a smooth transition from the "project mode" to the "operations mode". This process consists of the following steps:

* **Identify Transition Goals:** identify the goals to reach at the end of the transition. Define what must be achieved in order to consider the transition successful. Document any prerequisites that must be fulfilled before the transition can start.
* **Identify Transition Activities:** define and estimate all transition activities that must be accomplished before, during and after the transition in order to reach the transition goals. Determine the responsible for each activity. Integrate these activities in the overall *Project Work Plan* and manage them as being part of normal project activities. Don't forget coordination, communication or other more specific transition activities, such as: backups, data conversion, training, developing a roll-back plan, etc.
* **Develop Transition Schedule:** determine the transition timeline and milestones. Estimate the length of the transition period and the extent of overlap with other project activities. Develop a high-level schedule for all transition activities.

*<Customise the above process as per your project or/and organization needs.>*

## Business Implementation Management

*<Present a high level summary of the business implementation management approach to be used in order to prepare and change the performing organisation to use the project's outputs and achieve the benefits as specified in the Business Case or/and simply provide a link to the project's Business Implementation Plan.>*

The business implementation management process comprises the activities related to prepare and manage the changes to the organisation that will occur as a result of the project. This process consists of the following steps:

* **Identify Impact on Processes:** assess how the project will affect already existing business processes in the performing organization. Define the new business processes. Strive to disrupt normal business operations as little as possible during project implementation.
* **Identify Impact on People:** assess how the project will impact the people using the project's outputs. Consider resistance-to-change, communication, functional support, training, etc.
* **Identify Cultural Impact:** assess how the project will have an impact on the organizational culture. Consider individual or group behavior, organizational practices or shared values.
* **Define Implementation Strategy:** define the communication strategy, promotional and other change activities that fall within the project's responsibilities and that will promote a smooth implementation of the project's outputs into the organization.
* **Define Change Activities:** define necessary change activities that support the implementation strategy. Consider project activities, change activities for the organisation and post-project change activities.
* **Benefits Tracking:** Identify, describe and recommend activities and metrics for measuring the benefits realisation of the project in the future.

*<Customise the above process as per your project or/and organization needs.>*

## Resource Management

*<This section should present how the necessary resources will be acquired, managed and, if necessary, released at the end of the project. Resources can be human (people with specific skills) or non-human (for example hardware, licences, a building, a meeting room…*

*In particular for human resources, this section should describe how external resources can be contracted (allowed framework contracts etc.), measured and released. For internal resources, any temporary authority delegation, re-organisation in the hierarchy, need to be clarified in order to avoid authority conflicts. If additional training is needed the following elements from the Resource Plan can be added.>*

**Training Needs**

The purpose of this section is to document and track the training required for the project, capture project training records and document any waivers for required project training. This summary of project-specific training will also be used to bring new people on board to the project.

Note that the training needs do not refer to any user/stakeholder training on the final deliverables, but only cover any training that members of the Project Team will need to be more effective in their project work. For example, training on the PM2 Methodology may be deemed as necessary for the Project Manager (PM) and Business Manager (BM), or technical trainings for any technical Project Core Team (PCT) Members.

Training on project-specific procedures/methods/tools will be provided to the project team and any other groups that the project interfaces with, as required. This training will be provided by or acquired by the Project Manager (PM).

*<Examples of project-specific training include, but are not limited to:*

* *Project’s Issues Management procedure*
* *Technical aspects of the project*
* *Configuration Management System and associated procedures being used by the project*
* *Etc.>*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Resource ID** | **Resource** | **Training/ Skill** | **Current skill level** | **Desired skill level** | **Method of Delivery** | **Delivered by** | **Target Delivery Date** |
| *H.5* | *Programmer* | *Java* | *Intermediate* | *Advanced* | *Coaching* | *Resource Y* | *22/03/2017* |
| *H.6* | *Programmer* | *Rational Tools* | *Beginner* | *Advanced* | *Internal course* | *Trainer X* | *12/03/2017* |
| *H.7* | *Tester* | *Mercury tools* | *Beginner* | *Intermediate* | *External Course 3-days* | *Training centre Z* | *18/03/2017* |

***Resource ID –*** *unique identifier of the team member to be trained*

***Resource******–*** *name of team member*

***Training/skill –*** *this is a specific item which requires training*

***Current skill level –*** *identifies the skill level that the team member actually has in this item*

***Desired skill level –*** *identifies the skill level that the team member must acquire in order to deliver the requested project results*

***Method of Delivery –*** *identifies the method of delivery (i.e., self-study, project kick-off meeting, scheduled training session, formal classes, mentoring, coaching, etc.)*

***Delivered by –*** *identifies who will deliver the training when the method of delivery is by a person or a group (i.e., Project Manager, Learning**Services****,*** *experienced team member, etc.)*

***Target Delivery Date –*** *this is the planned date for training on this item to be completed.*

# Project Progress Measurement

## Project Progress Measuring Approach

*<This section should provide a summary of the project progress, performance and forecasting measuring approach that will be used for the monitoring (tracking) and controlling of the project. For example, Earned Value Management (EVM) or Earned Schedule Management (ESM) may be the preferred method, or perhaps simply tracking at the milestone level is deemed as adequate.*

*It is useful to also define in this section what information will be tracked (e.g. Effort spent, money spent, milestone met, etc.) and how often.>*

## Project Reports

*<In the subsection below, define and describe the reports to be used during this project. The frequency, medium and recipients will be defined in the section Communications Management.>*

### Status and Progress Reports

*<In this section the various types of progress reports should be defined and briefly described, and links to the report templates should be provided. As per the project configuration rules, the location of the folder with all the completed progress reports should also be provided.>*

#### Other Reports

*<In this section all other types of project reports should be defined and briefly described and links to the report templates and the location of the folder with all the completed reports should be provided.>*

## Project Checklists

*<This section should provide a list of the project checklists that will be used for the monitoring and controlling of the project. Eliminate the ones that will not be used>*

Following checklists will be used in order to monitor and control the project:

* Phase-exit Review Checklist
* Quality Review Checklist
* Deliverables Acceptance Checklist
* Transition Checklist
* Business Implementation Checklist
* Stakeholder Checklist

# Project Roles & Responsibilities

## Consolidated Responsibilities Assignment Matrix (RAM/RASCI) *<Amend the table below. Make it specific for your project stakeholders>*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Initiating** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Project Initiation Request | I | n.a. | **A/S** | **R** | **S**/C | I | n.a. | n.a. |
| Business Case | I | C | **A** | **R** | C | **S** | **S** | n.a. |
| Project Charter | I | **A** | C | **S** | C | **S** | **R** | C |
| **Planning** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | [**BM**](http://www.cc.cec/wikis/display/PM2/Business+Manager+%28BM%29) | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | **PCT** |
| Planning Kick-off Meeting | I | **A** | C | **S** | C | C | **R** | C |
| Project Handbook | I | I | **A** | **S** | C | I | **R** | C |
| Project Stakeholder Matrix | I | I | **A** | **S** | C | I | **R** | C |
| Project Work Plan | I | **A** | C | **S**/C | C | C | **R** | **S**/C |
| Outsourcing Plan | **A** | C | C | C | I | **S** | **R** | I |
| Deliverables Acceptance Plan | I | **A** | C | **S** | I | C | **R** | C |
| Transition Plan | I | **A** | C | C | C | C | **R** | C |
| Business Implementation Plan | I | I | **A** | **R** | C | I | **S** | I |
| Management Plans |  | | | | | | | |
| Requirements Management Plan | I | I | **A** | C | C | I | **R** | S |
| Project Change Management Plan | I | I | **A** | C | I | I | **R** | I |
| Risk Management Plan | I | C | **A** | C | I | I | **R** | I |
| Issue Management Plan | I | I | **A** | C | C | I | **R** | C |
| Quality Management Plan | I | **A** | C | C | C | C | **R** | C |
| Communications Management Plan | I | I | **A** | **S** | C | I | **R** | C |
| **Executing** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | **BM** | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | [**PCT**](http://www.cc.cec/wikis/display/PM2/Project+Core+Team+%28PCT%29) |
| Executing Kick-off Meeting | I | **A** | C | **S**/C | C | C | **R** | C |
| Project Coordination | I | I | **A** | **S** | I | I | **R** | I |
| Quality Assurance | I | I | I | **S** | C | I | **A** | **R** |
| Project Reporting | I | I | **A** | **S**/C | I/C | I/C | **R** | C |
| Information Distribution | I | I | **A** | C | I | I | **R** | C |
| **Monitor & Control** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | **BM** | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | **PM** | [**PCT**](http://www.cc.cec/wikis/display/PM2/Project+Core+Team+%28PCT%29) |
| Monitor Project Performance | I | I | **A** | C | C | I | **R** | C |
| Control Schedule | I | I | **A** | C | C | I | **R** | C |
| Control Cost | I | I | **A** | C | C | I | **R** | C |
| Manage Stakeholders | I | I | **A** | S/C | I | C | **R** | I |
| Manage Requirements | I | I | **A** | C | C | I | **R** | S |
| Manage Project Changes | I | C | **A** | **S** | I | I | **R** | C |
| Manage Risks | I | C | **A** | **S**/C | C | I | **R** | C |
| Manage Issues & Decisions | I | I | **A** | **S** | C | I | **R** | C |
| Manage Quality | I | I | I | **S**/C | C | **A** | **R** | C |
| Manage Deliverables Acceptance | I | I | **A** | **S** | C | C | **R** | C |
| Manage Business Implementation | I | I | **A** | **R** | C | I | **S** | I |
| Manage Transition | I | **A** | C | C | C | C | **R** | C |
| Manage Outsourcing | **A** | C | C | C | I | **S** | **R** | I |
| **Closing** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | [**BM**](http://www.cc.cec/wikis/display/PM2/Business+Manager+%28BM%29) | **UR** | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | **PCT** |
| Project-End Review Meeting | I | **A** | C | **S** | C | C | **R** | C |
| Project-End Report | I | **A** | C | **S** | C | C | **R** | C |
| Administrative Closure | I | C | **A** | C | I | C | **R** | I |

## Description of Project Roles and Responsibilities

In the following section, the roles of major players in a project are described alongside with the responsibilities, expectations, rights and duties of each participant in the project.

*<Only keep the roles relevant to your projects. Any deviations to the Standard PM2 Roles & Responsibilities should be highlighted.*

*Bear in mind that a role that a person performs in a project may be independent of his function in the personnel in an organisation. Nevertheless, certain roles necessitate a certain level of authority in the organisation as well as some competences that may appear at the function specification for a person. In such cases the descriptions of a role also mention the function that this person occupies in the organisation.>*

### Project Stakeholders

|  |
| --- |
| **Description** |
| Project stakeholders are people (or groups) who can affect or can be affected by both the activities performed during the life of a project, or/and by the project’s output(s) and outcome(s). Stakeholders can be directly involved in a project’s work, or can be members of other internal organisations, or even be external to the performing organisation (e.g. suppliers, users, EU citizens, contractors, NGO’s, industry partners, member states, etc.). |
| **Responsibilities** |
| * <Describe the responsibilities for specific project stakeholder groups> |

### Project Steering Committee (PSC)

|  |
| --- |
| **Description** |
| The permanent members of the committee are:   * Project Owner (PO) who chairs the committee, is the key-decision maker and accountable for the success of the project. * Business Manager (BM) who is a delegate of the Project Owner (PO) and collaborates closely with the Project manager (PM). * Solution Provider (SP) who assumes the overall accountability for the project deliverables. * Project Manager (PM) who is responsible for the entire projects and its deliverables .   The optional members of the committee are:   * User Representatives (UR) who represents the interests of the users to the project. * Project Support Office (PSO) that administers PSC meetings and project documentation. * Project Quality Assurance (PQA) that is responsible for quality assurance and auditing. * Architecture Office (AO) that plays an advisory role on architectural aspects of information systems. * Contractor's Project Manager (CPM) responsible for the outsourced parts of the project. * Data Protection Coordinator (DPC) to consult and advise on data protection aspects. * Local Information Security Officer (LISO) to consult, and advise on security aspects. * Document Management Officer (DMO) to assure a coherent implementation of the document management roles. |
| **Responsibilities** |
| * Champions the project and raises awareness at senior level. * Guides and promotes the successful execution of the project at a strategic level, keeping the project focused towards its scope. * Ensures adherence to organisation policies and directions. * Provides high level monitoring and control of the project. * At the end of the Initiating phase, authorises the project to continue, based on the project's Business Case and Project Charter, unless this is performed by the Appropriate Governance Body (AGB). * At the end of the Planning Phase, authorises the project to continue to the Executing phase, based on the Project Handbook and Project Work Plan. * Authorises plan deviations, scope changes with high project impact and decides on recommendations. * Arbitrates on conflicts and negotiates solutions to escalated issues. * Drives and manages change in the organisation caused by the project. * Approves and signs-off the management artefacts regarding quality, delivery and closing (Business Case, Project Charter, Project Work Plan, etc.). |

#### Project Owner (PO)

|  |
| --- |
| **Description** |
| Is the key project decision maker and accountable for project success. |
| **Responsibilities** |
| * Acts as the project champion promoting the success of the project. * Chairs the Project Steering Committee (PSC). * Provides leadership and strategic direction to the Business Manager (BM) and Project Manager (PM). * Sets the business objective and defines the *Business Case* for the project. * Owns the project risks and assures proper project outcomes are in-line with business objectives and priorities. * Mobilises the necessary resources for the project in accordance to the budget. * Monitors project progress regularly. * Coordinates resolution of issues and conflicts. * Ensures that the project outcome meets the business expectations. * Drives organisation change and monitors proper evolution and change implementation. * Approves and signs-off all key management milestone artefacts (*Project Handbook*, *Project Management Plans*, *Business Implementation Plan*, etc.). |

#### Solution Provider (SP)

|  |
| --- |
| **Description** |
| Assumes overall accountability for the project deliverables. |
| **Responsibilities** |
| * Represents the interests of those designing, delivering, procuring, and implementing the project's deliverables. * May help the Project Owner (PO) to define the *Business Case* and scope, deliverables, milestones and budget required for the project. * Agrees on objectives for the supplier activities and approves the contractor's deliverables for the project (if applicable). * Assumes the overall accountability for project deliverables and services requested by the Project Owner (PO). * Mobilises the required resources from supplier side and appoints the Project Manager (PM) |

#### Business Manager (BM)

|  |
| --- |
| **Description** |
| Represents the Project Owner (PO) on a daily basis within the project and collaborates closely with the Project Manager (PM). |
| **Responsibilities** |
| * Assists the Project Owner (PO) on the specification of the project and the main business objectives. * Establishes and guarantees an efficient collaboration and communication channel with the Project Manager (PM). * Coordinates the Business Implementation Group (BIG) and acts as a liaison between the User Representatives (UR) and the provider organisation. * Is responsible for the *Project Initiation Request*, *Business Case* and *Business Implementation Plan*. * Ensures that the products delivered by the project fulfil the user's need * Manages the business side activities of the project and assures that the required business resources are made available. * Devises the best track for business change or reengineering actions, when needed. * Ensures that the business organisation is ready to accommodate the project's deliverables when made available by the provider organisation. * Leads the implementation of the business changes within the users organisation. * Coordinates the schedule and delivery of user training (and production of necessary user support material). |

#### Project Manager (PM)

|  |
| --- |
| **Description** |
| Manages the project on a daily basis and is responsible for the qualitative product delivery within the imposed constraints. |
| **Responsibilities** |
| * Proposes and executes the project plans as approved by the Project Steering Committee (PSC). * Daily manages and coordinates the Project Core Team (PCT) activities, making optimal use of the allocated resources. * Ensures that project scope is realised within the quality, time, and cost constraints, taking preventive or corrective measures where necessary. * Manages stakeholder's expectations. * Is responsible to create all the management artefacts (except *Project Initiation Request*, *Business Case* and *Business Implementation Plan*) and proposes them for approval to the Project Owner (PO) or the Project Steering Committee (PSC). * Ensures a controlled evolution of products under version control, by implementing the Project Change Management Plan. * Compares project actuals and expenditures to what was planned and reports project progress accordingly to the Project Steering Committee (PSC). * Performs risk management for project related risks. * Escalates unresolvable project issues to the Project Steering Committee (PSC) * Liaises between the Directing and Performing Layers of the project. |

### Business Implementation Group (BIG)

|  |
| --- |
| **Description** |
| Consists of representatives from the business and user groups. The Business Implementation Group (BIG) is responsible for implementing the business changes that need to be in place in order for the organisation to be able to effectively integrate the project deliverables into everyday work. |
| **Responsibilities** |
| * Under the coordination of the Business Manager (BM), the Business Implementation Group (BIG) plans and implements the activities needed to achieve the desired business changes as described in the *Business Case* and the *Business Implementation Plan*. * Analyses the impact of the project implementation to the ongoing operations and existing business processes, the people and the culture of the organisation. * Participates in the design or updating of any affected business processes. * Prepares the affected business area for the upcoming change * Advises the Business Manager (BM) concerning the readiness of the organisation to change * Embeds the project deliverables into the business operations and implements organisational change activities that fall under the scope of the project. |

#### User Representatives (URs)

|  |
| --- |
| **Description** |
| Represent the interests of the end-users in the project. User Representatives (URs) are part of the Business Implementation Group (BIG). Involving the User Representatives (URs) throughout the project is important, as they gain visibility of project activities, a sense of ownership and motivation, which ensures that the deliverables are fit for business purpose. |
| **Responsibilities** |
| * Helps to define business needs and requirements. * Ensures that the project specifications and deliverables meet the needs of all users. * Approves on behalf of the users the project specification and acceptance criteria. * Communicates and prioritises user opinions in Project Steering Committee (PSC) decisions on whether to implement recommendations on proposed changes. * Participates in demonstrations and pilot phases as needed. * Performs the deliverable acceptance tests. * Signs off documents related to the users (documentation, requirements, etc.). * Guarantees the stability of the business during the transition towards the new operational state. |

### Project Core Team (PCT)

|  |
| --- |
| **Description** |
| Consists of the specialist roles responsible for the creation of the project deliverables. The composition and structure of the Project Core Team (PCT) depends on the size and type of the project (e.g. IT project, policy development project, etc.) and is defined by the Project Manager (PM). |
| **Responsibilities** |
| Under the coordination of the Project Manager (PM), the Project Core Team (PCT):   * Contributes in the elaboration of the project scope and the planning of the project activities. * Performs the project activities according to the *project work plan* and schedule. * Produces project deliverables. * Provides information to the Project Manager (PM) regarding the progress of activities. * Participates in project meetings as needed and contributes to the resolution of issues. * Participates in the Project-End Meeting to derive and document useful lessons learned for the organisation. |

#### Contractor's Project Manager (CPM)

|  |
| --- |
| **Description** |
| Leads the contractor's staff working on the project. |
| **Responsibilities** |
| * Collaborates closely with the Project Manager (PM). * Plan, controls and reports on the production of deliverables. * Ensures that all work is performed on time and to the agreed standards and quality. * Guarantees the successful completion and delivery of the subcontracted activities. |

#### Assistant Project Manager (APM)

|  |
| --- |
| **Description** |
| In large projects the Project Manager (PM) might find it useful to delegate a part of the project management tasks to an assistant. This Assistant Project Manager (APM) works closely together with the Project Manager (PM) in realizing the project scope and acts as a his backup. Although the Project Manager (PM) can delegate certain tasks to the Assistant project Manager (APM), the PM remains responsible for the correct execution of these tasks. |
| **Responsibilities** |
| * Reports to and takes directions from the Project Manager (PM). * Assists in the development and execution of project and team plans (or parts of it). * Communicates plans, decisions, and instructions to the Project Core Team (PCT) or external contractors. * Participates in coordinating the Project Core team (PCT) and Project Support Team (PST). * Provides guidance to project participants in support of work execution. * Assists with the organisation of project meetings and creating the minutes. * Gathers status information, actuals and forecasts of all work packages and advises the Project Manager (PM) of any discrepancies. * Proactively detects quality or scheduling issues and proposes preventive actions. * Prepares or contributes to project status reports in timely manner. * Supports the risk and change management process, updates the *Risk* and *Change Logs*. * Coordinates deliverable acceptance with internal and external users and stakeholders. * Establishes the routine project communications to inform project stakeholders. |

#### Add any domain specific roles (or delete this section)

|  |
| --- |
| **Description** |
| Examples: Architecture Office, Business Analyst, System Support staff, |
| **Responsibilities** |
|  |

#### Team Coordinator (TeCo) - Agile Projects only

|  |
| --- |
| **Description** |
| Acts as a facilitator and team coach whose main purpose is to create and maintain the conditions (e.g. resources, issue resolution) to allow the team to be focused on achieving specific objectives and being successful. |
| **Responsibilities** |
| * Ensures the effectiveness and continuous improvement of the way the Project Core Team (PCT) works. * Facilitates the collaborative and cooperative working environment within the Project Core Team (PCT). * Coordinates the planning and estimation activities, as well as the work progress report with the Project Manager (PM). * Ensures that the Project Core Team can be fully dedicated to delivery-related activities and on achieving the defined specific goals. * Facilitates the decision making within the Project Core Team (PCT). * Works actively to identify and remove all obstacles preventing the team to achieve the iteration objectives. |

#### Product Owner (PrOw) - Agile Projects only

|  |
| --- |
| **Description** |
| Represents mainly client and end-users concerns. |
| **Responsibilities** |
| * Prioritizes continuously the requirements to be addressed by the Project Core Team (PCT) in alignment with the feedback from both the stakeholders community and the PCT. * Clarifies domain-related questions that the Project Core Team (PCT) may have or ensures that a channel with the relevant stakeholders is open for collaboration and clarification. * Facilitates requirements gathering and modelling sessions. * Ensures that the stakeholder's community is represented in them. * Facilitates the presentation of project's intermediate outputs to the stakeholder community (demos). * Ensures that the stakeholders understand the benefits achieved by the agile approach followed by the Project Core Team (PCT). |

#### Architecture Owner (ArOw) - Agile Projects only

|  |
| --- |
| **Description** |
| The solution architect responsible for the architecture decisions for the Project Core Team (PCT). |
| **Responsibilities** |
| * Guides the creation and evolution of the architecture of the IS that the team is working on, avoiding dictating the architectural direction in favour of a collaborative, team-based approach. * Leads the initial architecture envisioning effort at the beginning of the project and supports the initial requirements envisioning effort (particularly when it comes to understanding and evolving the non-functional requirements for the IS), focusing on the project lifecycle and also on the evolution and maintainability of the IS. * Ensures the alignment of the architecture of the IS with the guidelines and recommendations of the Architecture Office (AO) and support of established Enterprise Architecture principles. * Leverages existing and/or planned IT investments in the organisation by continuously promoting a culture of reuse and interoperability within the Project Core Team (PCT). * Contributes to the organisation's set of reusable IT assets by considering the overall domain which the IS will support and the IT strategy of the organisation. * Informs the Team Coordinator (TeCo) and the Project Manager (PM) of the main architectural risks and contribute to define the adequate risk management strategy. |

#### Agile Team Member (ATeM) - Agile Projects only

|  |
| --- |
| **Description** |
| Focuses on producing the actual IS that is part of the project's solution to the stakeholders needs. |
| **Responsibilities** |
| * Participates in planning and estimation of iterations, releases. * Participates in the solution architecture design. * Develops part of the information system, in collaboration with the solution architecture design. * Tests developments. * Provides progress information to the Team Coordinator. * Communicates and collaborate with the rest of the Project Core Team (PCT). |

### Project Support Team (PST)

|  |
| --- |
| **Description** |
| Consists of the roles responsible for providing support to the project. The composition and structure of the Project Support Team (PST) depends on the size of the project and is defined by the Project Manager (PM). The Project Support Team (PST) role may be assumed by team members, a specific team or be provided as horizontal services by the organisation. |
| **Responsibilities** |
| * Provides administrative support to the project. * Defines requirements for reporting and communications. * Administers the Project Steering Committee (PSC) meetings and produces consolidated reports. * Supports the Project Manager (PM) in planning, monitoring and controlling the project. * Advises on project management tools and administrative services. * Administers the project documentation (versioning, archiving, etc.).   Examples of roles comprising the PST are: Project Support Office (PSO), Project Quality Assurance (PQA), Architecture Office (AO). |

#### Project Support Office (PSO)

|  |
| --- |
| **Description** |
| Provides support to the Project Manager (PM) and the Project Core Team. |
| **Responsibilities** |
| * Advises on project management tools, guidance and administrative services. * Administers Project Steering Committee (PSC) meetings. * Produces consolidated reporting to the Project Steering Committee (PSC). * Manages internal communication. * Establishes standards, tools, procedures and methods for use on the project. * Administers Project Management aspects such as document change control, baseline of plans, etc. * Can play the role of the custodian and guardian of all master copies of the project's products. |

#### Project Quality Assurance (PQA)

|  |
| --- |
| **Description** |
| Assures the quality of the project and its deliverables, independently of the Project Manager (PM). |
| **Responsibilities** |
| * Ensures adherence to organisation’s policies, directions and predefined project management processes. * Establishes quality assurance standards. * Supports the Project Manager (PM) in planning, monitoring and controlling the quality of the project. * Reviews project management processes and artefacts (e.g. *Project Charter* and Project Management Plans) as part of quality assurance. * Identifies non-conformities or opportunities for improvement and recommends actions to the Project Steering Committee (PSC) for decision. * Reports to the Project Steering Committee (PSC). |

# Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>*  *<03.Project\_Charter.XYZ.11-11-2017.V.1.0.docx>* | *<Example of a location>*  *< U:\METHODS\ProjectX\Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 |  |  |