



DATA ITEM DESCRIPTION	
1. TITLE PROJECT PLAN (PP)	2. IDENTIFICATION NUMBER PPA-000907-10 18 November 2020
3. DESCRIPTION/PURPOSE OF THE PROJECT PLAN 3.1 The Project Plan defines the plans and procedures of an enterprise for the management and conduct by that enterprise of a fully integrated program in satisfaction of project objectives and requirements. Project requirements may be established by the enterprise or may be established under a contract between the enterprise and a customer external to the enterprise. 3.2 Throughout this DID, the term “enterprise” may be interpreted to mean "customer", "contractor", "subcontractor" or other organizational element, as applicable, responsible for performance of the work which is the subject of the Project Plan. 3.3 The Project Plan, including or supplemented by subordinate plans, is used to provide direction and guidance to the management team and their subordinate teams/individuals responsible for conduct of the work. The Project Plan may also be used to provide visibility to a customer of a tenderer's or contractor's project planning and processes. 3.4 The content of the Project Plan is intended to be responsive to contract requirements, if any, but is not, itself intended to be invoked contractually.	
4. APPLICATION/INTERRELATIONSHIP 4.1 The Project Plan is subordinate to and derives its authority from a contract, directive, project brief or similar document. This Data Item Description (DID) may be cited contractually in a Statement of Requirement (SOR), Statement of Work (SOW), a Contract Data Requirements List (CDRL), or within a standard invoked by a SOR or SOW. 4.2 The Project Plan may exist in partial satisfaction of the requirements of process standards such as ISO 9001, which may be invoked contractually or by enterprise management decision. 4.3 This Project Plan DID is consistent with the requirements of the PRINCE2 project management methodology.	
5. PREPARATION GUIDELINES 5.1 General Instructions a. Automated techniques. Use of automated techniques is encouraged. The term “document” in this DID means a collection of data regardless of its medium. <i>continued next page</i>	
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5. PREPARATION GUIDELINES *continued*

5.2 Acronyms

Acronyms used in this document shall be interpreted as follows:

ASCII	American Standard Code for Information Interchange
CALS	Computer Aided Logistics Support
CASE	Computer-Aided System Engineering
CC	Creative Commons
CDRL	Contract Data Requirements List
DID	Data Item Description
ILS	Integrated Logistics Support
PRINCE2	PRojects IN Controlled Environment
SOR	Statement of Requirement
SOW	Statement of Work
WBS	Work Breakdown Structure

5.3 Abbreviations

Abbreviations used in this document shall be interpreted as follows:

SI	International System of Units
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5.4 Foreword

This Data Item Description (DID) is intended to provide instruction on the preparation of a structured planning document that guides the organisation, conduct and control of a project and its related activities. This Project Plan may arise as a form of agreement between stakeholders and project team members or, it may act as a directive document to assist a project manager or team leader in carrying out a project, or both. The Project Plan documents and communicates planned tasks, organization, tasking of organizational elements, scheduling, staffing and other resources concerned with the effort in conducting the project, in response to project requirements and goals.

Implementing this DID will communicate the answers to the following fundamental questions concerning project activities:

1. *Why?* In overview, why was the project initiated? What is the motivation for the commitment of time and resources? i.e. What is the project purpose?
2. *What?* What are the products and services to be output by the project in pursuit of fulfilment of the project purpose? What are the risk areas associated with delivering these outputs and outcomes?
3. *Who?* Who are the responsible parties for conducting the project, and in doing so creating the deliverable product and services? What are their corresponding roles in delivery? How are the responsible parties to be organised to carry out various tasks and produce the various deliverables?
4. *When?* What are the stages and specific tasks to be performed for efficient and effective project delivery? When are the associated tasks, products and services planned to be commenced and completed?

Given the implicit value of a Project Plan and its importance in the execution of a project, the Project Plan should be created by skilled persons who exercise utmost care in its development. This role is normally performed by the person(s) responsible overall for conduct of the project – it is normally their plan, influenced by planning inputs from external stakeholders and from project team members. This participation is particularly important since a well-drafted Project Plan can prevent problems such as:

- Disagreements between stakeholders and project team members due to incompatible project visions among relevant parties;
- Incomplete/abandoned tasks due to unclear designation of responsibilities for the relevant tasks;
- Execution of extraneous tasks not contributing towards the achievement of project outcomes;
- Project delays, failures and cost overruns associated with unclear communication of and/or inadequate planning and allocation of resources.

The Project Plan is an essential tool in a project or team leader's arsenal since, if it is well-constructed and maintained carefully throughout the course of the project, the Project Plan can substantially increase the likelihood of project success.

5.5 Content Requirements

Content requirements begin on page 3. The numbers shown designate the paragraph numbers to be used in the document. Each such number is to be interpreted as having a prefix "5.5" within this DID. For example, the paragraph numbered 1.1 is to be interpreted as paragraph 5.5.1.1 within this DID.

The degree of detail to be incorporated should be guided by the following principle: include all information contractually required or necessary to bound, constrain and control the time, cost, schedule, processes used and process performance achieved by members of the management team responsible for implementation of the project. Exclude information which would undesirably constrain management initiative.

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1. INTRODUCTION AND SCOPE

This section should be divided into the following paragraphs.

1.1 Identification

This paragraph should contain a full identification of the project and, where applicable, the project stage, to which this document applies, including, as applicable, identification number(s), title(s) and abbreviation(s). Where the project to which the document applies includes variants or options to the requirements, variants or scope of work, the above information should be provided for each variant or option.

1.2 Background

This paragraph should briefly summarize the background to the project and the project to date, and should identify as applicable the project sponsor and other stakeholders as applicable. The paragraph should explain the setting of the project and broadly what the project must achieve. The paragraph should identify related initiatives.

1.3 Intended Use of the Project Plan

This paragraph should state the intended users and uses of the Project Plan, for the current and each planned future issue.

1.4 Document Overview

This paragraph should summarize the contents and structure of the Project Plan and should describe any security or privacy considerations associated with its use.

1.5 Subordinate Plan Summary

This section, if used, should provide an executive summary, with reference to the Project Plan, for all plans subordinate to and referenced by the Project Plan.

2. APPLICABLE AND OTHER REFERENCED DOCUMENTS

This section should list in the subparagraphs below the number, title, revision, and date of each document referenced in this plan. This section should also identify the source of each document not available through normal channels.

2.1 Applicable Documents

This paragraph should list each document which is invoked in whole or in part within sections 4. to 7. inclusive. The paragraph should contain any applicable rules for establishing precedence in the event of conflict of information between sections 4. to 7. inclusive and the applicable documents, and between applicable documents. The paragraph should also contain, where applicable, rules for establishing the applicable issue number of documents invoked in sections 4. to 8. inclusive.

2.2 Other Referenced Documents

This paragraph should list each document which is referenced in the Project Plan but which is not invoked in whole or in part by sections 4. to 8. inclusive as a part of the Project Plan.

3. DEFINITIONS, ACRONYMS AND ABBREVIATIONS

This section should be divided into the following paragraphs.

3.1 Definitions

This paragraph should list alphabetically and define each word or term used in sections 4. to 8. inclusive for which reliance on dictionary definitions is not appropriate. As a guide, terms which are not likely to be in the vocabulary of the intended users of the Project Plan, terms which have multiple dictionary meanings but only a single Project Plan meaning, technical terms and terms which are used with special meanings should be defined in this paragraph.

3.2 Acronyms

This paragraph should list alphabetically each acronym used in the document, together with the acronym's expanded meaning.

3.3 Abbreviations

This paragraph should list alphabetically each abbreviation used in the document, together with the abbreviation's expanded meaning, except that abbreviations within the International System (SI) system of units should not be listed.

4. PROJECT DEFINITION

The subparagraphs of this paragraph should identify the project objectives, total project scope, constraints and key assumptions.

4.1 Project Objectives

This paragraph should describe the objectives related to success of the project in the eyes of the stakeholder(s) on whose behalf the project is to be managed. Project objectives may be related to capability, cost, schedule, environment, public good, safety, law, politics, profit or other outcomes, as applicable. The information may be included by reference to a tasking document, such as a Project Brief. In this case this paragraph should summarize the project objectives.

4.2 Project Scope

This paragraph should define the scope of the project, with inclusions and exclusions. The information may be included by reference to a tasking document, such as a Project Brief. In this case this paragraph should summarize the project scope.

4.3 Project Constraints

This paragraph should identify the constraints which apply to conduct of the project. The information may be included by reference to a tasking document, such as a Project Brief. In this case this paragraph should summarize the project constraints.

4.4 Key Assumptions

This paragraph should identify any key assumptions under which the plan has been prepared.

5. WORK PLAN

The subparagraphs of this paragraph should define the plans for the accomplishment of the total project scope, including the supply of the deliverables, in terms of work structure and definition, schedules, budgets, organization, responsibility and authority, including, where applicable, contracted and subcontracted work performance.

5.1 Project Stages

This paragraph should identify the planned stage structure of the project (if any), and explain the reasons for selecting the proposed stage boundaries, together with the expected major products to be produced in each project stage.

5.2 Work Breakdown Structure (WBS)

This paragraph should incorporate, or include by reference, a Work Breakdown Structure (WBS), being a product-oriented breakdown of the deliverable products and services and the necessary products and services to be supplied internal to the project in order to accomplish the project scope. The WBS shows the products and services in the relationships intended in executing the project. The WBS comprises as a minimum a WBS Index and a WBS Dictionary.

Where the project is to be organized into stages, the stage structure should be visible in the WBS.

Every record of the WBS Index should include the following information:

- a. WBS number;
- b. WBS element title;
- c. hierarchical relationship to other elements, organized to reflect the way in which the project is to be executed; and
- d. revision number and date.

Each element of the WBS should be associated in the WBS Dictionary with the following information:

- a. project title;
- b. WBS element number;
- c. WBS element title;
- d. contract reference, if any;
- e. specification/document number which defines the element, if any;
- f. specification/document title, if any;
- g. WBS element summary description; and
- h. other cross references, including WBS element revision data and revision number.

The WBS dictionary may also identify for each WBS element the WBS elements with which that element interfaces.

The WBS dictionary is commonly placed in a separate document or as an Annex and referenced from this paragraph.

5.3 Project Quality Plan

This paragraph should incorporate, or include by reference, a planned profile or description of quality of project deliverables, including the tolerances to be used in the exercise of quality control of those deliverables.

5.4 Project Master Schedule

This paragraph should incorporate, or include by reference:

- a. a Project Product Master Schedule, showing in Gantt chart form the schedules of the level 2 WBS elements (i.e., elements one level down from “the project”); and
- b. a Project Master Schedule, oriented to show in Gantt chart form the schedules of the primary project functions such as project management, design, production, installation, integration and test, etc.

The paragraph, if used, should also describe the analysis and rationale used to derive the master schedules, and tolerances to apply in the exercise of schedule control.

5.5 Project Financial Plan

This paragraph should incorporate, or include by reference, a project budget and where applicable cash flow plan. The paragraph should also describe the analysis and rationale used to derive the cash flow plan, if included, and the tolerances to be used in the exercise of cost control.

5.6 Project Organization

This element should incorporate, or include by reference, the organizational breakdown structure showing entities responsible for performing the scope of work under the project.

The paragraph should include the following information:

- a. the enterprise's organization structure;
- b. the enterprise's project management organization structure;
- c. the enterprise's project management organization shown within the enterprise's organization structure;
- d. the enterprise's corporate relationship with contractors or subcontractors (as applicable) associated with the enterprise for the purpose of the project; and
- e. optionally, each major subcontractor organizational and project structure to the extent applicable to the project.

5.7 Subcontractor Relationships

This paragraph should describe the reporting and tasking relationships of the project organization with internal and external subcontractors to whom tasks are to be subcontracted.

5.8 Team and Sub-Team Composition and Purpose

This paragraph should identify, and describe the make-up of, each team to be employed in performance of the project, at the level which reports to the person responsible overall for conduct of the project. Example teams for a small project are system team, ILS team, management team, etc.

5.9 Project Team Member Responsibilities and Authority

This paragraph should define the responsibilities and authorities for each appointment within the project team structure.

5.10 Responsibility Assignment Matrix

This paragraph should contain a matrix showing the assignment of responsibilities for achievement of WBS elements, at the points in the WBS at which cost is collected, and cost and schedule are controlled and formally reported, to entities in the project organization.

5.11 Management Team Member Qualifications and Experience

This paragraph, if used, should contain descriptions of the required qualifications and experience of management team appointments.

5.12 Management Team Member Training

This paragraph, if used, should identify both internal and external training, as applicable, to be provided for members of the management team. The plan may include analysis of proficiency shortfalls, required training and planned schedules to achieve required proficiencies.

5.13 Planned Project Staffing

This paragraph should contain aggregate, labour-category-based, time-phased plans for the use of human resources in the performance of the project.

5.14 Other Resource Planning

This paragraph should identify other external resources required for conduct of the project, from where these resources will be sourced, amounts of resources required, associated schedules for the utilization of these resources and any other planning with respect to these other resources. Resource profiles should reflect the consolidation and coordination of planning for each WBS element.

Where customer-furnished resources are to be used, this paragraph should contain a list of such customer-furnished resources, the required delivery dates and the required delivery locations.

5.15 External Dependencies

This paragraph should identify the external inputs and events on which the success of the plan is dependent.

5.16 Risk and Contingency in the Work Plan

This paragraph should summarize those aspects of the work plan that give rise to cost, schedule, product quality or other risk, how these risks have been minimized, the assessed levels of residual risk and the contingency plans for responding in a controlled fashion should the residual risks be realized during the course of the project.

6. PROJECT MANAGEMENT

6.1 Project Management Inputs, Outputs, Functional and Organizational Interfaces

This paragraph should identify the depth of detailed information needed to be able to accomplish the activities (to the level of effort appropriate to the project) of the project management process, how needed information will be acquired when not available in documents already available, and how conflicts in information provided will be resolved.

6.2 Project Management Process Summary

This paragraph should summarize the project management process overall and each lower level process. Where the enterprise has a standard project management process, the paragraphs subsequent to this paragraph should describe that process, including any additional description necessary to comprehensively describe the processes to be used for:

- a. work organization;
- b. work planning;
- c. work authorization;
- d. project management participation in requirements and contract change management;
- e. cost and schedule performance management;
- f. project risk management; and
- g. subcontract management (if applicable).

Where the enterprise does not have a standard project management process, this paragraph should describe the processes to be used for managing the project, using at least the subparagraphs 6.3 to 6.10 inclusive below.

6.3 Work Organization

This paragraph should describe in detail the processes to be used for work organization.

6.4 Work Planning

This paragraph should describe in detail the processes to be used for work planning and replanning.

6.5 Work Authorization

This paragraph should describe in detail the processes to be used for work authorization.

6.6 Requirements and Contract Change Management

This paragraph should describe in detail the processes to be used for requirements and contract change management.

6.7 Cost and Schedule Performance Management

This paragraph should describe in detail the processes to be used for cost and schedule performance management. The following topics should be addressed:

- a. establishment of cost and schedule performance management baselines;
- b. procedures for cost collection;
- c. procedures for measurement of work accomplishment;
- d. aggregation and reporting of cost and schedule performance data;
- e. analysis of cost and schedule performance data; and
- f. corrective action.

6.8 Project Risk Management

This paragraph should describe in detail the processes to be used for project risk management. If the information is contained in a separate Risk Management Program Plan or similar document then the information should be summarized in this paragraph and referenced to the separate plan.

6.9 Subcontract Management

This paragraph should describe in detail the processes to be used for subcontract management, if applicable.

6.10 Project Management Tools Usage

This paragraph should identify the software and hardware tools, if any, to be used in support of project management, and describe the planned purpose and method of usage of each tool. Example tools that may be addressed by this paragraph are management information systems, databases, spread sheets, cost estimating tools, network scheduling tools and decision analysis tools.

7. PROJECT QUALITY ASSURANCE

This paragraph should define a set of plans and procedures to be implemented to ensure that the plans and procedures contained in the Project Plan are being followed and are effective. If the information is contained in a separate Quality Assurance Plan, or similar, the information should be summarized in this paragraph and referenced to the separate plan.

8. NOTES

This paragraph should contain any general information that aids in understanding or using the Project Plan (e.g., background information, rationale).

A. ANNEXES

Annexes may be used to provide information published separately for convenience in document maintenance or use (e.g., charts, databases). As applicable, each annex should be referenced in the main body of the document where the data would normally have been provided. Annexes may be bound or prepared digitally as separate documents for ease in use. Annexes should be lettered alphabetically (A, B, etc.).

Appendices may be used to annexes. Appendices should be numbered numerically (1, 2, etc.).