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| Company Name |
| Role Descriptions |
| [Type name of programme/project] |

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*The key roles that could be included (but not restricted to) in this document are as follows:*

1. *Portfolio Management*

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| --- | --- |
| Role | Description |
| *Portfolio Management Board (aka Portfolio Direction Group or Investment Committee)* | *The top-level governance body in an organization that makes investment decisions and prioritizes change initiatives, programmes and projects* |
| *Portfolio Delivery Group (aka Portfolio Progress Group or Change Delivery Committee)* | *The governance body in an organization that monitors progress and delivery of the portfolio* |
| *Portfolio Director (aka Business Change Director)* | *The senior manager responsible for the organization’s portfolio management strategy who leads the management and delivery of the change portfolio* |
| *Portfolio Manager* | *The manager who co-ordinates and manages the delivery of the change portfolio and reports on progress, advises and seeks direction from the other roles* |
| *Portfolio Benefits Manager* | *The manager who focuses on the realisation of benefits from the organization’s change portfolio and ensures they are optimised* |

1. *Programme Management*

|  |  |
| --- | --- |
| Role | Description |
| *Sponsoring Group* | *The top-level governance body in an organization that makes the investment decision and endorses the vision, rationale and justification for a change programmes or project. Appoint the SRO* |
| *Senior Responsible Owner (SRO) (aka Programme Director)* | *The senior manager responsible and accountable for delivery of a change programme, achievement of its stated vision and blueprint, and realisation of benefits, Chairs the Programme Board* |
| *Programme Board* | *The group established by the SRO to oversee and assure the planning and delivery of a programme, and support the SRO and Programmer Manager in doing so* |
| *Programme Manager* | *The individual responsible for day-to-day management and co-ordination of the programme and its projects, including preparation and management of all governance strategies, plans and tools. Appoints to project roles* |
| *Business Change Manager (aka Change Agent)* | *One or more individuals, appointed from the business areas affected by the change programme/project, to act as a focal point and liaison between the programme and business operations. Responsible for ensuring benefits management and realization. Appoints to Change Teams* |
| *Change Team* | *The group formed by a Business Change Manager to enable and co-ordinate input from business operations stakeholders and assist with planning and preparation of business change, transition and benefits realization* |
| *Programme Office* | *Provides a central resource and point of co-ordination and information management for a programme/project. Advises and assures on programme/project management standards, processes and systems and gives direct support to the Programme Manager, Programme Board and individual Projects* |

1. *Project Management*

|  |  |
| --- | --- |
| Role | Description |
| *Project Executive (aka Project Sponsor)* | *The senior manager responsible and accountable for delivery of a change project, achievement of its stated goals and delivery of its outputs. Chairs the Project Board* |
| *Project Board (aka Project Steering Group)* | *The group that has authority and responsibility for the project that comprises the Executive, Senior User(s) and Senior Supplier(s)* |
| *Project Manager* | *The individual responsible for day-to-day management and co-ordination and delivery of the project and its specified outputs on behalf of the Board. Appoints Team Managers* |
| *Team Manager* | *The individual responsible for ensuring production and delivery of outputs allocated by the Project Manager* |
| *Senior User* | *One or more individuals responsible for co-ordinating and specifying the needs of the business operation’s end-users* |
| *Senior Supplier* | *One or more individuals that represent the interests of those responsible for designing, building, facilitating, procuring and implementing the outputs from a project* |
| *Change Authority* | *The role to whom responsibility for authorizing change requests (for new or changed requirements) by the Project Board* |
| *Project Assurance* | *The role assigned to one or more independent person(s) (not the Project Manager) to monitor and report on specific areas of concern e.g. business, user, supplier* |
| *Project Support* | *Provides a central resource and point of co-ordination and information management for a project. Advises and assures on project management standards, processes and systems and gives direct support to the Project Manager and Project Board* |

# Roles

*Define the purpose of each role agreed for this programme/project and who has been assigned/allocated to the role.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Purpose | Allocated to | Reports | Date Assigned |
| *Title of the role* | *Description of the role and why it is needed* | *Who this role is allocated/assigned to* | *Which other role(s) this role reports to*  | *When assigned* |

# Skills and Experience

*Describe the skills and experience required for each role.*

|  |  |  |
| --- | --- | --- |
| Role | Skills | Experience Required |
| *Title of the role* | *Description of the specific skills needed to undertake this role* | *State the relevant/desired background and experience needed to fulfil this role* |

# Review

*Identify when this document was last reviewed and the date of the next review and update:*

|  |  |
| --- | --- |
| Date of Last Review |  |
| Date of Next Review |  |