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*This template is also structured using the increasingly popular ‘5-Case’ Strategic Model for assessment (sometimes used in business cases). Change the headings to suit your organisation.*

# Project ID

*Insert unique project ID or reference*

# Project Title

*Insert project name or title*

# Sponsoring Director

*Name the senior manager/director who is the sponsor for this project*

# Description

*Include a brief description of the project*

# Strategic Summary

*Indicate how the project supports the organization’s vision and strategic goals (and which are supported). Include specific references to any corporate key performance indicators (KPIs) contributed to and/or Balanced Scorecard or equivalent (if relevant)*

* 1. **Purpose/Vision Statement**

*Set out the Vision Statement or stated purpose for this project*

* 1. **Key Business Drivers**

*List the key external drivers that influence the need for the project and indicate the degree of relevance or priority accorded to each*

* 1. **Nature and Scope**

*Indicate how the proposed project will impact on the functions and work of the organization/operations. Note what is IN and OUT of scope*

# Stakeholders

*Identify the key stakeholders (including end-users) that have either an interest in or some influence over the project outcomes or outputs. Full details should be recorded in the Stakeholder Register*

# Options Summary

*Briefly describe the range of options and alternative solutions that have been considered. Your outline should address estimated costs, benefits, achievability, strategic fit and any other relevant factors. You should include a NO CHANGE option*

# Sourcing Options

*Indicate how the proposed project will be sourced and briefly describe the sourcing options that offer best value for money procurement of the required outcome/output*

# Financial Summary

* 1. **Investment/Development Costs**

*Indicate the range and estimated value of the likely costs incurred by the project. Include programme and project management and delivery costs, any benefit realisation costs, operational costs, capital investment costs.*

* 1. **Investment Timescale**

*Indicate over what period will these costs be incurred*

* 1. **Funding Options**

*Indicate if funding is already available or how the project will be funded*

* 1. **Forecast Benefits**

*Indicate the range and estimated value of the key benefits realised by the project. You could restrict this initially to the ‘top-six’ benefits*

* 1. **Benefit Realisation Timescale**

*Indicate over what period will these benefits be realised and what will be the pay-back (Return on Investment - ROI) period on the investment*

# Deliverables, Timescales and Milestones

* 1. **Key Deliverables (Project Outputs)**

*Identify and describe the project’s key deliverables. Capture details of individual deliverables in the Product Description document.*

* 1. **Key Milestones (Deliverables)**

*Indicate the initial estimates of start and end dates for each stage of the project (this template uses a generic set of Process Stages – substitute this with your organization’s own development framework/process).*

|  |  |  |
| --- | --- | --- |
| **Stage** | **Start Date** | **End Date** |
| *Initiation* |  |  |
| *Planning* |  |  |
| *Implementation* |  |  |
| *Embed/Benefits Realisation* |  |  |
| *Closure* |  |  |

*Include a detailed project plan as an Appendix.*

* 1. **Key Milestones**

*List the key project milestones for development, delivery and benefit realisation, and any required alignment e.g. to corporate business and reporting cycles*

* 1. **Dependencies and Interfaces**

*List the key project dependencies and interfaces both internal and external*

# Project Management Approach

* 1. **Key Roles**

*Indicate how the project will be organised and managed and who will fulfil the key roles (if decided at this stage). This template uses a generic set of roles – substitute this with your organization’s own defined roles/titles). Include an organization chart to show the team structure*

|  |  |
| --- | --- |
| **Role** | **Who** |
| *Project Sponsor/Executive* |  |
| *Project Manager* |  |
| *Business Change Manager (s)* |  |
| *Senior User(s)* |  |
| *Senior Supplier(s)* |  |
| *Project Team Members* |  |
| *Other…etc.* |  |

* 1. **Method and Approach**

*Indicate which process(es) will be required/used for this project and briefly describe the approach that will be adopted for the project e.g. formal project management methods etc. Include details of any tailoring or customisation of formal methods*

# Risk and Issue Management

* 1. **Risk Management Strategy**

*Set out the specific risk management strategy and approach to be adopted for the project, describing the techniques and standards to be adopted, and the key responsibilities for risk management*

* 1. **Project Risks**

*Briefly describe the significant risks (you could restrict this to the top-six) identified for the programme/project and, for each, indicate (where known at this stage) the potential impact and likelihood of the risk. Full details should be recorded in the Risk Register*

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Impact**  **(1=Low, 5=High)** | **Likelihood**  **(1=Low, 5=High)** | **Total (Impact x Likelihood)** |
| *Insert brief description of the risk* |  |  |  |

# 

* 1. **Issue Management Strategy**

*Set out the specific issue management strategy and approach to be adopted for the project, describing the techniques and standards to be adopted, and the key responsibilities for issue resolution and management*

* 1. **Project Issues**

*Briefly describe the current issues (you could restrict this to the top-six) identified for the programme/project and, for each, indicate (where known at this stage) how the issue will be addressed and who is responsible. Full details should be recorded in the Issues Log*

|  |  |  |
| --- | --- | --- |
| **Issue** | **Response** | **Responsibility** |
| *Insert brief description of the risk* |  |  |

# Business Assumptions and Constraints

*Identify any business assumptions or hypotheses to be tested that underpin this project*

# Communications Management and Plan

*Describe how communications with stakeholders will be managed during the project. Details should be captured in the Communications Plan*

# Quality Management and Plan

*Describe how quality will be managed and how assurance will be undertaken during the project, including key review/audit points. Details should be captured in the Quality Management Plan*

# Project Controls

* 1. **Change Control**

*Set out the arrangements for managing and approving changes to the project*

* 1. **Configuration Management**

*Set out the arrangements for configuration management of the project’s documentation and other assets e.g. project outputs. Details of all assets subject to configuration management should be captured in the Configuration Log.*

* 1. **Risk & Issue Escalation**

*Set out the arrangements for risk and issue management and how escalations will be handled and who will make decisions/give direction.*

* 1. **Progress Reporting**

*Set out the arrangements for monitoring and control of the project, including reporting cycles, frequency and format.*

# APPENDIX: Project Plan

# APPENDIX: Risk Register

# APPENDIX: Issue Log

# APPENDIX: Stakeholder Register

# APPENDIX: Configuration Log