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| Project Brief |
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*See also the MSWord ‘form’ version of this document – Project Assessment Tool - that can be used as either the Mandate or the initial Brief for a project.*

# Project ID

*Insert unique project ID*

# Project Title

*Insert project name*

# Sponsoring Director

*Insert name of the Sponsoring Director*

# Description

*Give a brief description of the project*

# Justification

*Briefly explain why this project is needed, including the origin or source of the requirements*

# Customers

*Indicate who is/are the intended recipient(s) or beneficiaries of the outcomes/outputs produced by the project*

# Key Stakeholders

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

# 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*

# Business and Operational Impact

*Identify the business areas that will be impacted or changed by the project and indicate the anticipated degree of impact*

# 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 Purpose/Vision Statement 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*

# 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 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*

# Timescales and Milestones

*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 |
| *Understand/Initiation* |  |  |
| *Planning* |  |  |
| *Implementation* |  |  |
| *Embed/Benefits Realisation* |  |  |
| *Closure* |  |  |

*Include an outline 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**

*List the key project dependencies both internal and external. (Further details should be included in the Projects Dossier)*

# Project Management

* 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).*

|  |  |
| --- | --- |
| Role | Who |
| *Sponsor/Executive* |  |
| *Project Manager* |  |
| *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.*

# Risk Summary

*Briefly describe the significant risks (you could restrict this to the top-six) identified for the 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* |  |  |  |

# Issues Summary

*Briefly describe the current issues (you could restrict this to the top-six) identified for the 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* |  |  |

# APPENDIX: Project Plan

# APPENDIX: Risk Register

# APPENDIX: Issues Log

# APPENDIX: Stakeholder Register