|  |
| --- |
| Component - Proposal/Options Analysis/Offer/Management PlanComponent project name |



Creative Commons information

© State of Queensland (Department of Transport and Main Roads) 2017



<http://creativecommons.org.licences/by/4.0/>

This work is licensed under a Creative Commons Attribution 4.0 Licence. You are free to copy, communicate and adapt the work, as long as you attribute the authors.
The Queensland Government supports and encourages the dissemination and exchange of information. However, copyright protects this publication. The State of Queensland has no objection to this material being reproduced, made available online or electronically but only if its recognised as the owner of the copyright and this material remains unaltered.

|  |  |
| --- | --- |
| Interpreter_Symbol | The Queensland Government is committed to providing accessible services to Queenslanders of all cultural and linguistic backgrounds. If you have difficulty understanding this publication and need a translator, please call the Translating and Interpreting Service (TIS National) on 13 14 50 and ask them to telephone the Queensland Department of Transport and Main Roads on 13 74 68. |

Disclaimer: While every care has been taken in preparing this publication, the State of Queensland accepts no responsibility for decisions or actions taken as a result of any data, information, statement or advice, expressed or implied, contained within. To the best of our knowledge, the content was correct at the time of publishing.

TMR OnQ Template Version 3.0 (06/09/2017)

Project Summary

|  |  |
| --- | --- |
| 1. **Region/Unit**

Component Assignment BriefOfferProjectPlanManagement PlanCompletion ReportOptions AnalysisBusinessCaseProposalHandover Report**4in1 Template** |  |
| 1. **Location**
 |  |
| 1. **Program**
 |  |
| 1. **Project Number**
 |  |
| 1. **Project Description**
 |  |

Document Control

|  |  |
| --- | --- |
| 1. Prepared by:
 | 1. Name
 |
| 1. Title:
 | 1. Job title
 |
| 1. Branch:
 | 1. Branch
 |
| 1. Division:
 | 1. Division
 |
| 1. Location:
 | 1. Floor, street, city
 |
| 1. Version no:
 | 1. 0.1
 |
| 1. Version date:
 | 1. dd mm yyyy
 |
| 1. Status:
 | 1. Initial Draft/Consultation Draft/Approved Document/Minor Revision/Major Revision
 |
| 1. DMS ref. no:
 | 1. DMS reference number
 |
| 1. File/Doc no:
 | 1. File number/document number
 |

Version history

|  |  |  |  |
| --- | --- | --- | --- |
| **Version no.** | **Date** | **Changed by** | **Nature of amendment** |
| 1. **0.1**
 |  |  | 1. **Initial draft.**
 |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Endorsement and Approval

Project Sponsor (delete for Component Proposal and Project Plan)

I agree to the project proceeding as proposed in this document.

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |

The following officers have **endorsed** this document

Program Manager (delete for Component Proposal and Project Plan)

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |

Project Manager (= Component Project Customer) (delete as above)

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |

Component Project Sponsor

I agree to the project proceeding as proposed in this document.

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |
| 1. **Comments**
 |
|  |

The following officers have **endorsed** this document.

Component Program Manager

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |

Component Project Manager

|  |  |
| --- | --- |
| 1. Name
 |  |
| 1. Position
 |  |
| 1. Signature
 |  | 1. Date
 |  |

Contents

[1. Purpose of this document 2](#_Toc492474294)

[2. Definitions 2](#_Toc492474295)

[3. Governance 2](#_Toc492474296)

[3.1 Key roles 3](#_Toc492474297)

[3.2 Project organisation structure 3](#_Toc492474298)

[3.3 Component program management requirements 3](#_Toc492474299)

[3.4 Business and program benefits of the project 3](#_Toc492474300)

[3.5 Reviews and reporting 4](#_Toc492474301)

[3.6 Project management method 4](#_Toc492474302)

[4. Overall project definition 4](#_Toc492474303)

[4.1 Location 4](#_Toc492474304)

[4.2 Background 4](#_Toc492474305)

[4.3 Current situation 4](#_Toc492474306)

[4.4 Objectives 5](#_Toc492474307)

[4.5 Proposed project 5](#_Toc492474308)

[4.6 Project performance measurement/success criteria/KPIs 5](#_Toc492474309)

[4.7 Product performance measurement/success criteria/KPIs 5](#_Toc492474310)

[5. Project scope 5](#_Toc492474311)

[5.1 In scope 5](#_Toc492474312)

[5.2 Out of scope 5](#_Toc492474313)

[5.3 Constraints 5](#_Toc492474314)

[5.4 Assumptions 6](#_Toc492474315)

[5.5 Related projects/proposals/planning studies 6](#_Toc492474316)

[5.6 Urgency 6](#_Toc492474317)

[6. Stakeholder impacts 6](#_Toc492474318)

[7. Options 7](#_Toc492474319)

[7.1 Options Considered (Options Analysis document only) 8](#_Toc492474320)

[7.2 Assessment Criteria (Options Analysis document only) 8](#_Toc492474321)

[7.3 Option Comparison (Options Analysis document only) 8](#_Toc492474322)

[7.4 Option Assessment (Options Analysis document only) 9](#_Toc492474323)

[8. Component project cost 9](#_Toc492474324)

[9. Project management plan 10](#_Toc492474325)

[9.1 Scope 10](#_Toc492474326)

[9.2 Time 11](#_Toc492474327)

[9.3 Cost 12](#_Toc492474328)

[9.4 Quality 12](#_Toc492474329)

[9.4.1 Safety 13](#_Toc492474330)

[9.4.2 Functionality 13](#_Toc492474331)

[9.5 Human Recourses 13](#_Toc492474332)

[9.6 Communications 14](#_Toc492474333)

[9.7 Risk 14](#_Toc492474334)

[9.8 Procurement 15](#_Toc492474335)

[9.9 Integration 16](#_Toc492474336)

[9.10 Phase transitions/handover/completion 16](#_Toc492474337)

[9.11 Design development 16](#_Toc492474338)

[9.12 Project Learnings 16](#_Toc492474339)

[10. Recommendations 17](#_Toc492474340)

[11. Annexures 17](#_Toc492474341)

Table of Figures

No table of figures entries found.

Table of Tables

No table of figures entries found.

|  |
| --- |
| Read this guidance text box before proceeding.1. This template is used for Component Options Analysis, Offer and Project Plan.
2. It contains a project management plan that covers from the present until the next major milestone in detail, and the remaining steps in outline form.
3. The ‘Project Plan’ term has been reserved for the implementation phase since OnQ’s inception in 2000. Using the term ‘project management plan’ throughout overcomes the difficulty of preparing the wrong template at the wrong time, just to have a management plan.
4. To create templates after the component options analysis, start with this template from the website, as it may contain updates, and the previous template may have left out some sections not relevant to that part of the process then but relevant now. Then bring material in Sections 1 to 6 forward from the previous template, bold italicising that text. Insert any new material in normal typeface, enabling a reviewer/approver to readily see what has changed from the last approved document. This can be particularly useful when there is a long time lapse between templates, and avoids unnecessary searching by the reviewer/approver. As this material is being brought forward, check that all the material mentioned in the guidance has been covered, then delete the corresponding guidance box.

Most sections contain guidance shown in yellow boxes and a content area denoted by a placeholder symbol Type here. Other sections contain draft text that needs to be reviewed and selected/amended/deleted as necessary.When the template is complete and the guidance boxes removed, update the table of contents by right-clicking in it and selecting ‘Update Field’, then ‘Update entire table’.Once approved, this document should be managed in accordance with the Department of Transport and Main Roads Recordkeeping Policy.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

Executive summary

|  |
| --- |
| 1. Extract the key points of this document. The executive summary should not say anything that has not been included in the body of the template. So it is usually best to write this section last i.e. after the rest of the template has been completed. Items that typically need to be in this summary include:
* A brief description of the problem or opportunity to be addressed
* An outline of the scope
* An outline of the project objectives and benefits sought
* Key risks and issues
* A summary of the time, costs and resources to complete the next stage
* A summary of the recommended course of action.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Purpose of this document

|  |
| --- |
| The purpose of this document is to (Delete from here to the relevant close bracket and delete any subsequent options, then copy the remaining text from this guidance box into the ‘Type here’ box below. *Note: Do not explain the project here.*Proposal -) identify the approach the component area will take internally to fulfilling the requirements of the Component Assignment Brief.Options Analysis -) document the options investigated, recommend a preferred option and obtain the customer’s agreement to proceed.Component Offer -) finalise scope definition of and concept estimate for the selected option, evaluate benefits and obtain the customer’s commitment to funding and agreement to the project’s inclusion in the organisation’s program. Project Plan -) outline how the project will be implemented, and confirm that the project can be delivered within the desired funding and timing.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Definitions

|  |
| --- |
| 1. In the table below, define any term the audience may not understand, including specific terms, abbreviations and acronyms.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

| Terms, abbreviations and acronyms | Meaning |
| --- | --- |
| Customer | Decision maker ‘owning’ the new asset |
| Sponsor | Head of the delivery group |
|  |  |

1. Governance

|  |
| --- |
| 1. Once the following sub-sections are completed for the first time, there should be few changes in following templates, other than staff/phase transitions or a change in strategic direction as a consequence of the electoral cycle.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. The component project will be/is being managed in accordance with the project management policy of April 2012 and the principles on the OnQ website under governance. Governance arrangements for the component project are set out below.
	1. Key roles

|  |
| --- |
| 1. Identify key personnel in the proposed project in the table below. Each member of the team must be aware of their roles and responsibilities.
2. Refer to the OnQ website for clarity on ‘roles and responsibilities’.
3. Where multiple organisations/agencies are involved that own different parts of the new/upgraded asset/network to be created by this project, list the coordinating customer who will be responsible for obtaining agreement from the others on required functionality when the project identifies any such issues. The other customers should also be listed.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. The key project management roles are:

|  |  |
| --- | --- |
| 1. Project Customer
 | 1. [Name], [Position]
 |
| 1. Project Sponsor
 | 1. [Name], [Position]
 |
| 1. Concept Manager
 | 1. [Name], [Position]
 |
| 1. Program Manager
 | 1. [Name], [Position]
 |
| 1. Project Manager
 | 1. [Name], [Position]
 |
| 1. Advisory Group
 | 1. (optional)
 |
| 1. Component Project Sponsor
 | 1. [Name], [Position]
 |
| 1. Component Program Manager
 | 1. [Name], [Position]
 |
| 1. Component Project Manager
 | 1. [Name], [Position]
 |

* 1. Project organisation structure

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief. Add as appropriate for the component project.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Component program management requirements

|  |
| --- |
| 1. Initially state the internal program this project is included in and managed under. Bring forward for later templates.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Business and program benefits of the project

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Reviews and reporting

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.
2. Indicate the component internal reporting cycle, and any internal review requirements.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Project management method

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

ICT component projects not using OnQ will outline their method and indicate how interoperability with OnQ will be achieved.See the component interaction flow on the OnQ site under Project Management> Methodology> Component interaction.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Overall project definition
	1. Location

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Background

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Current situation

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Objectives

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Proposed project

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Project performance measurement/success criteria/KPIs

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Product performance measurement/success criteria/KPIs

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Project scope
	1. In scope

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Out of scope

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Constraints

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template and add as appropriate for the component project.
2. Identify any restriction or limitation, either internal or external to the project that will affect its delivery. Constraints may include budget, time, staff, developments/events, political circumstances, electoral cycle, funding availability, permits, materials supply, availability of key equipment, seasonal weather conditions, legislative requirements, immovable physical objects etc.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

Type here

* 1. Assumptions

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template and add as appropriate for the component project.

Assumptions bring a degree of risk to the project, as they are often presumed to be true, are easily overlooked and can appear to be not worth documenting. Examine your implicit as well as explicit assumptions and list them, for your own protection. Some examples are:* key resources will continue to be available
* funding will continue to be available (e.g. following change of federal/state government).

Assumptions should be reviewed as part of the risk management process.Particularly review the veracity of assumptions before finalising the business case. To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Related projects/proposals/planning studies

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template and add as appropriate for the component project.

Identify any internal and external projects or proposals which may have an impact on this project or will be impacted by it, such as other projects that may use the same resources or budgets, or may even have been established to address similar needs.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Urgency

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template and add as appropriate for the component project.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Stakeholder impacts

|  |
| --- |
| 1. Bring forward from the Component Assignment Brief/last template and add as appropriate for the component project.

Impacts may be internal and/or external, positive or negative and may vary during the life of the project (costs, disruptions, temporary arrangements etc.). Some of these may require culture change and associated change management, either internally (where staff attitudes will be important) or externally within the community affected. New standards/policies/legislation/regulation may impact outside agencies and service providers. Overview the stakeholder consultation carried out to date. Complete/amend the following tables as appropriate. This section is meant to include the standout stakeholders and groups only, to guide targeting of key messages in the external communications plan. Thereafter it will remind the project of the original groupings and identify for approvers any new group or major individual stakeholder that may emerge. The following tables are not intended to substitute for the more detailed stakeholder records and analysis done as part of Section 9.6 external communications plan.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. **Internal**

| Stakeholder  | Impact/Interest in the project |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

1. **External**

| Stakeholder | Impact/Interest in the project |
| --- | --- |
|  |  |
|  |  |
|  |  |

1. Options

|  |
| --- |
| Note: Where, after reading this guidance text, there is nothing to add in this section, delete the subheadings and guidance and enter Nil here so the heading numbers remain the same.Component Proposal – list any options to be considered in very broad terms only and delete the four sub- sections below. Options Analysis – complete the four sub-sections below, removing the words ‘Options Analysis document only’ Component Offer – This section may contain only a summary outline of other options considered and the reasons for dismissing them, with the four sub-sections below deleted. Component Project Plan – This whole section is generally not required.To delete this guidance text box right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Options Considered (Options Analysis document only)

|  |
| --- |
| Consider a range of feasible possibilities. Options may involve only parts of the project, and the analysis may present relative or comparative costs for individual portions. Risk-adjusted estimates (of revenue, costs, duration and benefits) may need to be applied to address project characteristics, level of knowledge and degree of confidence in the estimates. Note that while cost estimates of various options will normally be attached, the cost reported in the following full section headed ‘Component Project Cost’ should be the total cost of the recommended option only.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Assessment Criteria (Options Analysis document only)

|  |
| --- |
| The following assessment criteria can be considered:* Rating of achievement of project and strategic objectives
* Cost, including potential revenues
* Economic benefit (net present value/BCR)
* Whole of life cost
* Public interest assessment/stakeholder impacts
* Legislative requirements and regulatory issues
* Whole of government policy issues/government priorities
* Procurement strategies
* Environmental/cultural heritage benefits/impacts
* Social benefits and their distribution
* Key assumptions and or risks
* Timing and sequencing of project delivery
* Constructability.
1. Attach results of analysis and evaluate these to determine the best option to proceed with.
2. Comparative costs need include only costs that differ between options. Cost may be just one criterion, or it may need to be considered separately and may be a go/no go item,

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Option Comparison (Options Analysis document only)

|  |
| --- |
| Options should be first evaluated against major ‘go/no go’ criteria and any option which does not meet these criteria should not be considered further. Remaining options will then be compared.One comparison method is weighted multi criteria analysis. This is carried out as follows:* Identify the criteria and weightings for each criterion. Note that each criterion must be totally discrete from the others. Weightings can be derived by agreement, or via a paired comparison technique. Weightings are generally expressed as a percentage and values assigned by evaluating their relative importance.
* Rate each option against each criterion. Use of a 1-10 scale is common.
* Add the weighted scores for all criteria for each option

Alternative methods include using a traffic light colouring system, or Low, Medium and High, classifications rather than numeric values.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Option Assessment (Options Analysis document only)

|  |
| --- |
| Assess the options. Include a qualitative description/summary of the advantages/strengths, disadvantages/weaknesses and estimated comparative costs of the various options. Note that small differences in total score may not necessarily identify the best option due to the level of accuracy of the process. Be sure to arrive at a conclusion. Until you can do that, you’re not ready to progress to making a component offer for inclusion in the controlling project’s Business Case.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Component project cost

|  |
| --- |
| 1. Complete a project cost estimate. Consider using the Basic Cost Estimating and Estimate and Financial Impact Analysis proformas on the OnQ site at tools> proformas. Ensure internal departmental costs are included as well as consulting and contract costs. Extract from this estimate to the following table.
2. Various scenarios may be estimated, for example worst case, best case and most likely (being the project’s planning estimate). Details of underpinning assumptions should be provided. For example the worst-case scenario may be based upon an increased customer enquiry level from a most likely level of 10% to a worst-case level of 20%). Cost estimates can be shown against major deliverables (for example software, hardware). Details of contingencies should also be provided.Appropriate financial evaluation methods include:
* a payback period for projects requiring modest levels of outlays overrelatively short time horizons (consider cash flow techniques, for example net present value and internal rate of return)
* payback periods and internal rates of return calculations do not apply to cost only projects since there are no positive cash flows generating a repayment cycle
* net present value can be expressed as a negative number and still adopted for ranking of projects on a financial basis

In preparing these financial indicators involve regions or branches or corporate finance staff as a technical support resource where appropriate.1. Complete/amend the following as necessary.

To delete this guidance text box right-mouse click within this box, select Delete Rows. |

1. Type here
2. The confidence level in this estimate is very low/low/medium/high/very high.

|  |  |
| --- | --- |
| Project Phase | Total ($) |
| 1. Concept
 |  |
| 1. Development
 |  |
| 1. Implementation
 |  |
| 1. Finalisation
 |  |
| 1. Sub Total
 |  |
|  |  |
| Contingency |  |
| Total Project Cost |  |
|  |  |
| Escalation Amount |  |
| Out-turn Cost |  |
| Estimated likely Whole of Life Benefit Cost Ratio Range |  |
| Amount of any funding/contributions approved to date |  |

1. Project management plan
	1. Scope

|  |
| --- |
| 1. Add to or amend the following as appropriate to the template being prepared. Note that scope may be impacted by the time available, the funds potentially available and the quality requirements for the finished product, such as the design standards, as detailed under sub-section 4 below on quality.
2. Once scope is finalised, the project manager needs to be constantly on the lookout for any scope changes and have them documented, costed and forwarded to the customer for decision. Failure to do this results in scope creep. Approved variations for additional works are not scope creep, for the project manager at least.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Scope will be managed initially by proceeding through the concept and development phases to enumerate the scope defined in Section 5 above.
3. Once scope is finalised, any changes will be identified, costed and their implications for time and quality determined, using the OnQ site> tools> proformas> project change request and change log, or other required/existing organisational process. Any changes to estimated cost will be handled through the cost variation process in sub-section 5 below on cost.
	1. Time

|  |
| --- |
| 1. The plan for the concept phase and the indicative strategy for the remaining phases are outlined by the milestone activities listed in the tables below. These tables will often suffice for the Proposal, but if a more detailed electronic schedule has been prepared, it should be attached. Use of an electronic scheduling package is advisable for later stages, particularly for larger projects
2. Any proposed staging of the project should be mentioned.
3. Complete the tables below and review and amend the text following them as necessary.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Progress of the concept phase will be managed against the milestones listed below:

| Milestone | Date |
| --- | --- |
| 1. Develop component proposal
 |  |
| 1. Commence component Options Analysis
 |  |
| 1. Prepare consultant briefs and offer documentation (if required)
 |  |
| 1. Select consultant, negotiate prices and gain financial approval
 |  |
| 1. Commence component Options Analysis
 |  |
| 1. Complete component Options Analysis
 |  |
| 1. Controlling project approval to proceed
 |  |
| 1. Develop the preferred option
 |  |
| 1. Complete component offer
 |  |

The following information will provide input to development of an electronic schedule for later phases.

| Activity | Planned Date |
| --- | --- |
| 1. Business case approved
 |  |
| 1. Commence detailed design
 |  |
| 1. Detailed design completed
 |  |
| 1. Commence procurement
 |  |
| 1. Contract award
 |  |
| 1. Commence implementation
 |  |
| 1. Implementation completed
 |  |
| 1. Handover documents prepared
 |  |

1. Progress will be reviewed and reported monthly, initially against the above milestones, and at later stages, against an electronic schedule.

Extensions of Time (EOTs) will be recorded in a change log for major contracts.

* 1. Cost

|  |
| --- |
| 1. Extract the cost of completing this phase of the project from the Project Cost Estimate into the table below. It may be necessary in later templates to provide estimated monthly cash flow. Note also that there are worksheets on the OnQ site under Tools> proformas and worksheets to assist with basic costing and with financial impact analysis, including revenue (if any).
2. Complete the table below for the current/coming phase and review and amend the text following it as necessary.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here

| Activity | Total ($) |
| --- | --- |
| 1. Project Management
 |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| 1. Total Phase Cost
 |  |

1. Staff and contractor staff working in-house will use CATS timesheets, and apportion their times to appropriate cost codes determined by the project manager.
2. Expenditure will be recorded in SAP. General Ledger (GL) codes will be assigned to all expenditure, and detailed estimate items aggregated to a suitable level into either SAP WBS elements or internal orders. The structure of these needs to be determined by the project manager at the start of the job. The total of these estimated items becomes the project management budget for each cost code/internal order, which SAP expenditure will be monitored against.
3. SAP line items will be reviewed monthly, if necessary, to ensure no items have been charged to the wrong cost code, and that any such items are corrected.
4. Expenditure will be reviewed and the forecast cost to complete will be estimated monthly.
5. Variations to project internal budget items will be identified by the project manager/team and submissions requesting financial approval will be approved as per the limit of each officer’s financial delegation, with due consideration being given to the impact on total project budget.

Variations that need to be funded from contingencies will be identified by the project manager/team and the funds approved/released by the program manager.

* 1. Quality

|  |
| --- |
| 1. Outline the anticipated quality requirements of the finished product.
2. Amend the following text as required.
3. Where there is no required quality assurance format, the OnQ quality matrix on the OnQ site under Tools> proformas and worksheets can be used.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. The quality requirements of the end product will be addressed during the concept phase process of considering options and developing the component offer. This processes is designed to balance aspirations for project scope, completion date, cost and quality, all of which impact upon each other. Once these matters are settled and the project proceeds to implementation, then the quality standards will be incorporated into any subsequent work/contract brief.
	* 1. Safety

|  |
| --- |
| A ‘Zero Harm’ policy exists within TMR which aspires to achieve an incident and injury-free work environment where every person comes to work and goes home again safely.This covers all activities, from the office based concept development, data collection and site investigations through to operations. To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	* 1. Functionality

|  |
| --- |
| 1. The project manager needs to be alert to the project objectives, section 4.4 and the product success criteria, Section 4.7. The impact of project decisions upon these needs to be considered, and where there is an impact, the customer should be advised and provided with appropriate costed options. Where substantial improvements in functionality become possible through performing additional work at additional cost, the customer may be willing to pay.
2. For ICT component projects, functionality is generally expressed in the BPA and BRS documents.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Decisions on issues that could either reduce or increase functionality will be referred to the customer.
	1. Human Recourses

|  |
| --- |
| 1. Identify the skills and resources required to deliver this and subsequent phases as appropriate. Consider means of obtaining the resources and filling any skill/resource gaps by means such as internal transfer, recruitment, secondment, consultancies, contractors or training internal staff. For large projects, consider having an operator’s representative on the project team.
2. List the roles and general responsibilities that will form the basis of position descriptions.
3. Consider using the staff roles and responsibilities proforma and the Responsibility Assignment Matrix (RAM) on the OnQ site under tools> proformas for the detailed assignment of responsibilities and tasks once the resources are in place. These would be attached when this template is completed as a project plan, and may, on occasion, be attached to others as well.
4. Consider also opportunities for professional development and skills transfer, as well as how performance will be monitored and training requirements determined.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Communications
2. **External to project**

|  |
| --- |
| Formal communications with the controlling project occurs as per the component interaction flow process on the OnQ site under Project Management> Methodology> Component interaction.1. A completed OnQ external communications strategy/plan and worksheets from the OnQ site under Tools> proformas and worksheets may be attached where the component project is handling any external communications itself.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. External to project communication will be managed as per the attached external Communications management plan and worksheets.
2. **Internal to project**

|  |
| --- |
| 1. Complete and attach completed OnQ internal communications plan and any necessary worksheets, located on the OnQ site under Tools> proformas and worksheets.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Internal project communication will be managed as per the attached Internal Communications management plan and worksheets.
	1. Risk

|  |
| --- |
| 1. Proposal – Identify the risks to the concept phase and the overall or high level risks which may impact on later phases of the project. These risks will be fully defined during preparation of the business case.
2. Options Analysis – Expand on the concept risk list and/or assess comparative risks. Consider commencing use of the corporate risk management log.
3. Component Offer and Project Plan – Attach completed corporate risk management log and include only the higher level risks in the table below.
4. The TMR risk prompt list can assist with the identification of risks. It contains several hundred risks in a number of categories. This list can be found at: <http://tmrintranet/~/media/bf5ea575-e386-493f-a955-c90b9929baaa/tmr%20risk%20prompt%20list.pdf>
5. The Risk Management Log can be found at: <http://tmrintranet/Policies-and-procedures/Risk-Advisory-Unit/Risk-Management-Tools-and-Techniques.aspx> and further information is available from the Risk Advisory Unit (RAU) in Corporate Governance.
6. Complete the table below and review and amend the text following it as necessary.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. The table below identifies the major risks or uncertainties likely to be encountered in this phase as well as the remaining phases of the project.

| Risk details | Comment on likelihood, consequence and treatment |
| --- | --- |
| Overall Project Key Risks |
|  |  |
|  |  |
|  |  |
|  |  |
| Concept Phase Risks |
|  |  |
|  |  |
|  |  |
|  |  |

1. This list will be further developed by:
* taking these risks into the risk register in the corporate risk log,
* expanding as the project scope and impacts are fully developed,
* referring back to the corporate risk prompt list, and
* conducting (a) risk workshop(s).
* conducting (a) value management workshop(s).
* monitoring, reviewing and updating the risk register on a monthly/quarterly basis.
	1. Procurement

|  |
| --- |
| Describe the methods to be adopted for procurement of the major consultancies/services to be engaged. These methods may include public invitation, private invitation from several suppliers on a prequalified list, newspaper or telephone invitations. Sole offers may be used in some limited circumstances, however their use should be kept to a minimum.1. Later templates will include contract management arrangements, indicating who will be the principal’s representative and agent, superintendent and representative, contract administrator etc.
2. Where there is no required procurement planning format, the procurement requirements matrix on the OnQ site under Tools> proformas and worksheets can be used.

Amend the following text as necessary.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. The major consultancies/contracts/service providers required are listed below together with the proposed procurement method:

| Consultancy/Contract/Service Required | Expected $ value | Procurement method |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

1. Procurement will be in accordance with the State Purchasing Policy and departmental procurement procedures.

All purchase orders will be processed in SAP and approval limits will be monitored in Unifier/P6.

1. Corporate Card will be used for purchase of small items provided these items are not cumulative to an amount in excess of the current limit.

Requisitions for goods/services and purchase orders will be created in SAP.

Accounts will be processed and paid through SAP.

* 1. Integration
1. This project management plan has been prepared taking into account the requirements of all knowledge areas, and so provides the means of integrating them, ensuring they can be progressed individually and as a seamless part of the whole project with cohesive inter-relationships. Management against this plan using the issues register on the OnQ site under tools> proformas will provide ongoing integration that will be supported by the regular project meetings and reporting outlined in this plan.
	1. Phase transitions/handover/completion

|  |
| --- |
| 1. In the concept phase templates, identify any phase transition arrangements, such as handover from a concept phase project manager to a delivery project manager.
2. At Component Offer and Project Plan, overview any known operational issues, along with intended commissioning arrangements that may be required for equipment/operating systems, as well as operations manual preparation, asset transfer, handover, maintenance and warranty arrangements.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
	1. Design development

|  |
| --- |
| 1. Within the OnQ methodology, design development is a ‘work management’ activity, not a ‘project management’ activity. A record of key decisions should be progressively completed throughout concept and development phases.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

Design considerations will be progressively.

* 1. Project Learnings

|  |
| --- |
| 1. There is a learnings register on the OnQ website under tools> proformas. One way of using this is to have it in a directory area accessible to all team members who can add anything they wish to it as the project progresses. This may be in very rough form, but the advantage is currency at the time of writing, and if added to regularly by all, avoids losing learnings that may be forgotten by the time it comes to preparing the completion report. Preparation of the completion report needs to resolve conflicting views that may have been expressed in the register and present these concisely and cohesively. Of course, information for this report will also be obtained from the project filing system and e-mail records.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Learnings on the project will be progressively entered into the learnings register from the OnQ website. Project team members will add to this progressively throughout the project, and it will be an agenda item at monthly team meetings. This will provide a source of information for preparation of the completion report at the end of the project.
2. Recommendations

|  |
| --- |
| 1. Summarise the key findings and make a recommendation on whether the project should proceed past this point/gate to preparation of the next template in the series.

To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here
2. Annexures

|  |
| --- |
| Annexures may include but not be limited to the following: Project Cost EstimateResponsibility Assignment MatrixExternal Communications Plan (OnQ proforma)Internal Communications Plan (OnQ proforma)To delete this guidance text box, right-mouse click within this box, select Delete Rows. |

1. Type here

|  |
| --- |
| When the template is complete and the guidance boxes removed, update the table of contents by right-clicking and selecting ‘Update Field’, then ‘Update entire table’.To delete this guidance text box, right-mouse click within this box, select Delete Rows. |