Project Definition Notes

These notes are to help Project Managers fill in the Project Definition form. They include the FAQs that other Project Managers have raised - please do tell us if any points are unclear or wrong, and if more is needed.

We are of course very happy to discuss all aspects of getting a project going, including detailed discussion of the Project Definition, so please do feel free to ask. These are just notes to help.

Programme and Project Unit
Department of Corporate Information and Computing Services
University of Sheffield, 285 Glossop Road, Sheffield S10 2HB, UK
E-mail: cics-ppu@sheffield.ac.uk

The Shape of the Project Definition

These are the areas that you and the Project Board need to address, and the Project Definition is shaped to fit this.

Why are we doing this project? What are we trying to achieve?

What's included? What's excluded?

What will be the outputs of the project?

What benefits will be delivered?

What work must be done?

Who will do the work?

How long will it take?

How much will it cost?

Approval and Change History

How the Project Definition Gets Written and Approved

Typically:

1. The Project Manager writes the first draft of the Project Definition – 'V1 draft1' – often taking bits out of the Project Proposal if there is one. You may also draft a Project Plan at the same time and circulate and discuss it along with the Project Definition - particularly useful for larger projects with other departments involved.
2. Often projects will have some sort of 'brain storming' meeting with key people to shape what the project should be doing, what is involved, what are the real benefits etc. This is invaluable in getting the Project Definition into shape before the first formal Project Board.
3. The draft PD is then circulated around the Project Board, plus the Sponsor if they are not on the Board, for changes. Do also send the draft PD to the PPU so it goes to the Service Strategy Board for feedback.
4. The first Project Board meeting discusses the document one section at a time, agreeing it or making changes, to make sure there is real agreement.
5. Any changes from the Project Board are confirmed with the Sponsor (if they are not on the Project Board) and incorporated into the document, and if necessary the document can be re-circulated for confirmation, as 'V1 draft2' etc. When agreed the document becomes 'V1 Final' and the Project Board and Sponsor sign it off. Send the final PD to the PPU so it goes to the Service Strategy Board for information.

NB This process may well be abbreviated for a smaller project. The main point is that there is a genuine understanding in the Project Board and Sponsor that this document defines what the project is for, what will be done and not done, and that this document is owned by the Project Board, not the Project Manager.

So the document is normally approved by the Project Board and the Sponsor, but in a small project this might just be the Sponsor (in which case change the table appropriately). The sponsor should be named.

It may be appropriate to actually get a signature from the Sponsor (and perhaps Customer) on a hard copy, in which case the Project Office can hold this for you.

Change History

The Change History is only for major changes to the project. Each entry should briefly describe the change/s and the effects of this. The 'Approver' would normally be the Sponsor or Project Board.

You can circulate drafts of course etc before the 'V2 Final' – but make sure they are clearly labelled as drafts.

The point of this section is to clearly signal when and in what way the project changed course.

Project Summary

This should give an overview of the project and Project Definition. If someone needs a quick idea of what the project is about, the 'Project Summary' should give it to them.

Project Organisation

Project Sponsor

Delete this subsection if the sponsor is on the board.

Project Board

The main thing here is that the key interest groups should be represented somehow on the Board.

All projects have a Sponsor, Manager and Customer. Occasionally the same person may play two of these key roles but only in a small 'internal' project.

If the Customer is also the User then no separate 'User' is necessary. The other categories are optional, and you may want to create different ones.

The 'CiCS Service Manager' is there to ensure the project prepares from the start for managing and promoting the resulting service, and helps with ensuring a smooth transition.

Others

Working parties/sub-projects for a large project, or maybe just other key people. Delete this section if not needed.

Reporting Structure

Frequency of meetings

Gives Project Board members an idea of the time commitment.

For instance 'Project Board fortnightly at start-up then monthly. Working groups as required'.

Reporting

Perhaps you will circulate the project Monthly Report to the Project Board? If the Sponsor is not on the Project Board, how will they kept informed? Does this project report to an Application Group?

Stakeholders

Who has an interest in the project, and how they will be involved, e.g. 'on Project Board', 'e-mail newsletter', 'no contact' (hopefully not used often!).

Remember CiCS Frontline Support here - even if they don't need to be involved early on, most projects' deliverables result in calls to the Helpdesk.

Project Details

Scope

Think laterally here. What might someone 'out there' think would be included, or not included, in the project? For instance it may be obvious to you that the project is providing software not content, but is it obvious to the user? And maybe pilot content should be included? Much better to get the project scope clarified at start-up than have big ructions down the road.

Main Products/Deliverables

These could be a report, purchase contract, software, installed kit, commissioned system or whatever. Each project phase must produce at least one deliverable or how would you know it's complete?

A 'product' could possibly just be a verbal report or presentation in a small project, but if so this should always be noted, eg in Project Board minutes, with brief details and who accepted it.

Service Ownership and Support

This is about who will own and support different aspects of the resulting service (user support, technical, service review and development etc).

This will of course affect other aspects of the project, such as who should be involved in the project, how the transition to a service is managed, who will be responsible for benefits realisation.

Benefits

This section is about making sure full advantage will be taken of the project's deliverables. Listed here are the expected benefits to the University from the project's deliverables, and who on the Project Board is responsible for benefits delivery, ie making sure the new capabilities the project has delivered will be used.

Constraints and Concerns

For instance:

- Does this project depend on outputs of another project, or vice versa? Or should deployment be synchronised?
- Is the project dependent on external legislation or funding?
- Does it have a 'hard' delivery date, eg before the start of the new academic year?
- Maybe a re-organisation is looming that may force a change in direction or cancellation?

Underlying Assumptions

Significant assumptions, eg 'We assume there will be no major change in HEFCE funding structure', or 'We assume that the faculty restructuring will complete on time' or whatever.

These assumptions may well be reflected in the 'Risks' document, ie what happens if the assumption proves false?

Project Schedule

- Include here key Phases: There may only be one phase in a very short and simple project, whilst a large one could have quite a few. In a large project or one where the first phase is 'Research and Analysis' for instance, you may only be clear about the first phase. That's fine, just have a guess at times in further phases and note this, eg 'Implementation (rough estimate, longer if tendering needed)', 'Summer 2010' or whatever.
- Gateway review points: The end of each main phase should be regarded as a 'gateway' review, where the Project Board signs off the phase and reviews the direction, schedule and scope of the project.
- You need to indicate for each Phase what sort of Resources (people/skills) will be needed. The people involved in the project will have an idea of what will be needed. If not then talk to their team/group/section leaders – call on the PPU to help here. The advantage for you and the project of identifying resource needs is that if the CiCS Service Strategy Board and the other relevant departments, accept your Project Definition and Plan then you have a provisional commitment to that resource (provisional as there may be unforeseen events). And if the resource can't be agreed you will know in advance, and there can be some negotiation around timescales and resources so you and the project know what's happening, and the schedule can be reasonably realistic.
- Deliverables: Say what deliverables will come out of each phase. These may just be eg a report in earlier phases. Whatever, they will need to be signed off by the Project Board.
- Tasks: The Phases will naturally be copied into your Project Plan (if you have one), and probably be broken down there into tasks. You can use Microsoft Project (in which case use the template plan and follow the advice on the web), or just use a table or spreadsheet. It is not recommended that you break down the phases into tasks here in this document, apart possibly for very small projects.

Expected Environmental Impact

The 'Project Sustainability' Appraisal document and Guidance Notes will be helpful for completing this. If you do use the 'Appraisal' document then this section of the Definition will of course just be a brief overview of that.

Appendix: Main responsibilities of team members

Modify the roles and list of responsibilities if necessary so they reflect what will be expected of your Project Board members. That way they know what to expect.