

## Project Definition Form [or PID]

**Project Title:**

Put here a very brief title

**Sponsor:**

Insert actual sponsor name

**State below the link with the corporate agenda – the actual wording please.**

Put here the actual words in the corporate agenda – showing the link with this project

**Project Background:**

The background to the project. Enough information to inform the reader.

**Project Benefits:**

An outline of what the benefits are to the organisation, individuals or stakeholders in delivering the project

**Project Objectives:**

The specific objectives for the project. NOTE: the objectives can be one line or more detailed text.

**Project Deliverables:**

What you will be delivering at the end of the project. NOTE: these are the what you will have at the end of the project, e.g. a report, a building, improved service levels etc.

**This project will include:**

This section defines the boundaries of the project.

**This project will not include:**

Planning details should not be included at this stage.

**Success Criteria:**

How you will measure the success of the project. NOTE: the success criteria must be measurable.

**Constraints:**

Examples here can be specific (a skill which the project team must have) resources, or a legal deadline – NOTE: only include time and money if you can quantify them.

**Key Assumptions:**

The assumptions you are making in putting this document together.

**Project Manager:**

Who fulfils this role and what they do.

<b>Project Sponsor:</b>		Who fulfils this role and <u>what they do</u> .	
<b>Project Board/Steering Group Members:</b>	Who fulfils these roles and what they do. NOTE: may not be appropriate for <u>all</u> projects	<b>Project Team Members:</b>	
<b>Budget❶</b>			
<b>Resource Costs:</b>		<b>Other Costs:</b>	
<b>Total costs (attach a breakdown of the overall budget)</b>			
<ul style="list-style-type: none"> <li>VAT*– Some projects may have important VAT issues. Have you spoken to accountancy to discuss these?</li> </ul>			
<b>Start Date:</b>		<b>Completion Date:</b>	
<b>Signature of Project Manager:</b>		<b>Date:</b>	
<b>Approval from Sponsor:</b>		<b>Date:</b>	

- ❶ For your organisation, you will need to liaise with your Finance people in order to develop financial information that will inform project delivery. The data on this form in relation to finance needs to be fine tuned to your organisational and project management needs



## Stakeholder Analysis

The purpose of stakeholder analysis is to inform the project manager and sponsor who should contribute to the project, where barriers might be, and the actions that need to be taken prior to detailed project planning.

<b>Stakeholder</b>	<b>Their interest or requirement from the project</b>	<b>What the project needs from them</b>	<b>Perceived attitudes and/or risks</b>	<b>Actions to take</b>

## Risk Analysis

Score as follows, for Likelihood and Impact: High = 3, Medium = 2, Low = 1

<b>Nature of Risk or Uncertainty</b>	<b>Likelihood High/ Medium/ Low</b>	<b>Impact High/ Medium/ Low</b>	<b>Likelihood x Impact [Score]</b>	<b>Actions required and who will take responsibility to manage the risk</b>

## Project Reporting Form

<b>Project Title:</b>	Number:
Project Sponsor:	Project Manager:

<b>Progress Report</b>	Report No.
------------------------	------------

<b>RAG Status*:</b>	<b>RED / AMBER / GREEN</b>
---------------------	----------------------------

<b>Headlines</b>
------------------

Tasks, Milestones, Outcomes delivered this period		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Actual

<b>Major Risks and Issues</b> Include an assessment of the impact and any actions taken
---

<b>Recommendations and Requests for Decisions or Support</b>
--

Tasks, Milestones, Outcomes scheduled for next period		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Forecast
* RED	<i>"Major concern - escalate to the next level"</i> Slippage greater than 10% of remaining time or budget, or quality severely compromised. Corrective Action not in place, or not effective. Unlikely to deliver on time to budget or quality requirements		
AMBER	<i>"Minor concern – being actively managed"</i> Slippage less than 10% of remaining time or budget, or quality impact is minor. Remedial plan in place.		
GREEN	<i>"Normal level of attention"</i> No material slippage. No additional attention needed		

# Milestone Report

Project:

Date of Milestone meeting/discussion:

Deliverables due	Due date	R/A/G*	Action to take to bring deliverable or task back on schedule

\* **R** = Red flags [off plan - describe in detail: quality, cost, time]

**A** = Amber [is almost off schedule or will definitely be off schedule NOTE: you may need to agree the precise definition before use]

**G** = Green flags [to plan or better - show savings]