

Project Scope Management Plan

Expansion of Marino Enterprises Project



Students must:

- *Complete the template in full. Ensure all the advice provided as to how to complete each section is followed and all information is included*
- *Provide an explanation for the purpose of each section of the scope management plan. This can be copied from the Indoor Sustainable Garden Project so long as all reference to that project is deleted*
- *Document any research taken – either websites, verbal or book references – for any templates created for the document. This can also be copied from the Sustainable Garden Project ensuring it is tailored to the Expansion of Marino Enterprises project*
- *Assessor guidance has been provided in each of the sections. Accept variations of the information entered in the template, and variations of any templates included by the student*
- *Where changes have been made from the previous plan for the Sustainable Garden Project, the information is highlighted*

Complete Business Solutions Australia

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Version Control

[Add version number and details for initial document and thereafter as changes or regular monitoring occurs. Amend footer version as version of document changes.]

The student is to complete the version control table when changes have been made to the project scope management plan.

Version	Date	Author	Changes

1 Introduction

<<Describe the purpose of the Project Scope Management Plan for this project. Explain what the plan is to cover and the reason the plan is important.>>

- The student must use language in the Project Scope Management Plan that is appropriate for the audience including:
 - Formal business like style
 - Relevant headings and subheadings
 - Correct terminology for the different techniques, methods and discussion on the different sections, persons involved in the project
 - Grammatically correct English
 - Correct spelling
- The student must include:
 - The purpose of the project scope management plan
 - What the plan covers
 - Reason the plan is important

Accept variations of the following:

The purpose of this scope management plan is to define the scope for the Expansion of the Marino Enterprise Project. It is key to ensuring the project can be completed on time and within budget and accomplish the goals and objectives as intended.

The processes outlined provide a formal guideline for how the scope will be planned, developed, controlled and verified throughout its life cycle. The scope management plan documents the scope management approach, defines the roles and responsibilities for all people involved in the project, the work breakdown structure, procedures to manage scope and any changes to the scope and controls to manage scope.

Scope verification processes are included to measure and ensure the deliverables meet the original intent in accordance with the project scope.

2 Approach

<<Describe the purpose of this section and the various inputs (activities, processes and procedures) used to determine the scope of the project. Each scope component should be linked to the project deliverables and requirements.>>

The student must:

- Describe the purpose of the section e.g. 'This section is to define the activities, processes and procedures used to plan for, determine the scope of the project and seeking approvals for resources, scope, schedules in preparation for preparing the project scope plan'
- Name any appropriate initiation documents used in the collection and review of the individual projects e.g. Project Charter
- Align the approach taken to establish shared understanding of the project and identify project outcomes and deliverables e.g. meeting with Betsy Smith, Marino Director and the project sponsor, Gavin Stead.
- Describe any tools and techniques used for defining project scope e.g. subject matter experts, product analysis, workshops, expert judgement

An example is provided. Accept variations of the following:

The scope of this project is defined through a formal collection and review of the project objective and outlined in all available project documentation [documents should be named]. The review was led by the project manager, the CBSA project sponsor, Gavin Stead, and the Marino director, Betsy Smith. Based on

the review of all project requirements, the deliverable for the project were agreed upon and approved by the program sponsor and the Marino directors.

The scope is defined by the:

- Scope statement*
- Work breakdown structure (WBS)*
- Scope validation*
- Scope Control*

These components will be defined in more detail in the appropriate sections of the program plan to give a common understanding for all program participants.

3 Roles and Responsibilities

<<Describe the purpose of this section and outline the roles and responsibilities of the people involved in the project scope management process. The information is to be presented in a table.>>

An example is provided. Accept variations of the following.

This section provides persons and their role in the project. Overall responsibility for their role is outlined. This does not mean that other tasks will not be included as the project progresses'

Name	Role	Responsibility
<i>Gavin Stead, CBS Managing Director Director of Marino Enterprises</i>	<i>Program Sponsor/Owner of program</i>	<i>Approval authority for scope management plan Oversight of all aspects of the project Review, endorses or rejects any change requests to the scope of the project Acceptance the project deliverables</i>
<i>Tina Hughes, Sales and Marketing Manager</i>	<i>Project Manager</i>	<i>Overall management of project scope Oversee the development of the project scope management plan including evaluating and validating project scope Oversee the scope management process and analysis of impact of scope change of the project Approve scope changes to project Escalates scope and change issues to Program Sponsor Communicate decision of scope change requests to relevant program and project persons Conduct meetings for scope change requests as necessary Oversee scope control and validation measures Update all program documentation based on changes Develop program scope statement Develop WBS</i>

4 Scope Management Process

4.1 Scope statement

<<Describe the approach to developing the project scope statement based on information of individual projects. The project scope statement, at minimum, is to contain:

- *Summary of the project including the project boundary/limits.*
- *The project scope description explaining what the project is to achieve including the project objectives, benefits and requirements.*
- *The major project deliverables – detailed list of the major project deliverables including including measurable project outcomes and benefits.*
- *The project acceptance criteria – what requirements are to be met before the project is accepted as complete.*
- *Project exclusions – work that is not included in the project and therefore outside the scope.*
- *Project constraints – limits of resources for people, location of the project team, budget, time and/or equipment and are the boundary conditions within which the project must stay*
- *Project assumptions – list of assumptions under which the people involved in the project are working to complete the project as required. They are statements taken for granted or accepted as true without proof>>*

NOTE: There are many examples of scope statements on the internet. The scope statement must not be copied exactly – it must be adjusted and be appropriate for the project. If you access websites or other references to aid in designing the scope statement, you are to reference the source. An example of a scope statement can be found at <https://www.mypmlc.com/project-management-resources/free-project-management-templates/>>>

The student must:

- *Provide an explanation of the section e.g. 'The scope statement defines what the project is, what must and when it must be accomplished and the deliverables and outcomes that will be acceptable. It will take into account high-level product descriptions, constraints and assumptions.*
The project scope will include what is not included in the project scope to minimise the likelihood of unnecessary work being performed, or work tasks shifting priority and preventing the completion of the intended objectives of the project.'
- *Include at minimum information about each of the following. They must clearly show they understand the components required for this section.*
 - *Project summary*
 - *The business objectives of Marino Enterprises and CBSA*
 - *The product scope description*
 - *The project benefits*
 - *The project requirements*
 - *The project deliverables including measurable project outcomes and benefits*
 - *The project acceptance criteria*
 - *Project exclusions*
 - *Project constraints*
 - *Project assumptions*
- *Reference the sources used to design the scope statement*

4.2 Work breakdown structure (WBS)

<<Describe the purpose of the WBS and WBS dictionary. Provide the WBS and WBS dictionary, identifying the major deliverables and resource requirements at project levels.>>

NOTE: An internet search will provide a range of different WBS and WBS dictionary examples. Again, you are not to copy the template – it must be tailored to the project – and you must provide a reference or website for template searches.

The student must include:

The WBS dictionary provides further clarity on the tasks, resources and deliverables outlined in the WBS. Every part of the WBS must be entered into the WBS dictionary to ensure all work is accounted for, assigned appropriate resources and is relevant to the project deliverables

- *An explanation of how these tools help the Project Manager manage the scope for example:
The WBS and the WBS dictionary enable the breakdown of work tasks the need to be performed to meet the project objectives and requirements and the project scope. The manageable work tasks enable the overall project to be able to be managed more easily*
- *The website or other reference referred to for WBS and WBS dictionary*
- *Any suitable format for a project WBS is acceptable, but it must include at minimum:*
 - *A code*
 - *The name of the component*
 - *A brief description of each component*
- *Any suitable format for a project WBS dictionary is acceptable, but it must include the fields associated with the WBS document including:*
 - *WBS Level – the break down level of the WBS component in X.X.X format*
 - *WBS Code – a code associated with the specific WBS component*
 - *WBS component name*
 - *Description of Work – the work represented by the WBS component*
 - *Deliverable(s) – deliverables produced by doing the work represented by the WBS component at project and project level*
 - *The resources committed to do the work under the WBS component at a project and project level*
 - *Comments – any additional information needed to explain the WBS component*

4.3 Validation and acceptance of deliverables

<<Describe the purpose of this section and how deliverables will be validated against the original scope and how they will be formally accepted.>>

The student must include:

- *The purpose of the section e.g. ‘To outline how the success of the project will be able to be validated, tracked and measured against the scope and benefits at particular points throughout the project and at the end of the project’*
- *A statement relating to:*
 - *Validation and acceptance of deliverables for example: ‘The project’s deliverables and products will be accepted through the project’s formal acceptance processes. These processes are designed to ensure the deliverables are only accepted if they meet the respective acceptance criteria.’*
 - *The deliverables being signed off throughout the project and not left to the end of the project*
- *A clear description of the technique or method chosen to use to enable quantifiable and qualitative evaluation of project performance e.g KPIs and quantitative methods e.g. interviews, surveys to be used to evaluate project performance against project scope and strategic objectives*

4.4 Program scope requirement traceability matrix

<<Describe the program scope requirement traceability matrix and its purpose. A template for use during scope program management is to be included in Appendix 1>>

- *A statement describing the purpose of a scope requirement traceability matrix*

A requirements traceability matrix (RTM) is a tool to be used by the Program Manager to ensure the program (and by default project) scope, requirements and deliverables remain as they should compared to the baseline. It traces the program requirements from the program’s initial stages through its cycle to closure.

The requirements traceability matrix helps avoid scope creep, enables stakeholders to understand different components of the program outside their area of expertise in term of timelines and budget allocations and helps to manage conflict and priorities. It connects the requirements with program objectives and business goals and outcomes. If the requirement does not support the program or business objectives, goals or outcomes it probably should not be part of the project or program.

- *A scope requirement traceability matrix template in the Appendix. Any format of the matrix is acceptable so long as it includes at minimum:*
 - *An Identifier (ID) – this needs to be a unique identifier*
 - *Name of the requirement or code*
 - *Description of the requirement (use a title that explains the requirement not the whole specification)*
 - *Business need justification (short description linked to business objectives, needs, goals)*
 - *Program objectives*
 - *Source of request (person/department)*
 - *WBS deliverable element (code)*
 - *Test case/validation*
 - *Action*
 - *Status (active/finished)*
 - *Comments*

5 Making decisions

<<Describe the purpose of a decision log and how it will be used over the course of the project. Create a decision making record log template in Appendix 2.>>

The student must include a statement as to:

- *The purpose of the decision log*
- *How it is to be used and who can amend it*
- *Who has access to it*
- *The link to program objectives*

An example is provided. Accept variations of the following:

'The decision log is a communication tool to inform stakeholders of major decisions made, how the decision is reached and who is accountable for the decision.

It meets the program objective of delivering efficiency improvements to the business by strengthening program work processes and systems.

Decisions included in the log are those valuable to have recorded for the program such as decisions affecting future work of the project, decisions that may be confusing to stakeholders or decisions made by others outside of the team impacting team members.

The decision log is to be available to all stakeholders.

It can only be added to or amended by the Project Manager.'

6 Control of Scope

<<Describe the purpose of this section.>>

It has been decided that a regular project meeting will be held on the first Wednesday of each month either face to face or online.

A change control management plan is to be included in this section. A change to project scope request template is to be included in Appendix 3; a change request log in Appendix 4 and referred to with an explanation of use.

The risks regarding project scope will be documented using the template in Appendix 5. This template will then be transferred to the Risk Management Plan for further management.

You may like to include a process diagram to support your description.>>

NOTE:

There are many examples of change request templates available on the internet to be accessed and followed. An example of the format for a change request template can be found at <https://www.mypmlc.com/project-management-resources/free-project-management-templates/change-request-template/>

The template is not to be a direct copy of the example but is to be made relevant to the project.>>

The student is to:

- *Describe who is responsible for monitoring the project scope status*
- *Outline the processes by which the project scope is controlled e.g. all requests must be submitted in writing, who can initiate the change to project scope, who the request is to go to*
- *Outline any reviews that will occur e.g. weekly update on project status at weekly meeting and any document that might be used*
- *Scope change control:*
 - *Describe or visually illustrate the processes to approve/deny a requested change e.g. what happens when the change to project scope is approved; approved with modifications; rejected; deferred*
 - *Communication (email) used to inform the relevant person requesting the change of the outcome and any other relevant persons of the change outcome*
 - *Explain the outputs from the scope change control:*
 - *Importance of lessons learned e.g. cause of variance, reasoning behind corrective action*
 - *How the project scope is adjusted in relation to time, cost, quality, project objectives*
 - *How the project scope and any other documents will be updated*
 - *Outline of the ongoing maintenance of the project scope*
 - *Change request template. This template:*
 - *Must not be a direct copy of the templates from the suggested websites*
 - *Is to be tailored to the project*
 - *The change request template must include at minimum the following information with appropriate guidance and headings:*
 - *Project and project name if applicable*
 - *Change request number*
 - *The person requesting the change*
 - *The date the request was submitted (track time expended on responding to and possible act on the change)*
 - *Description of the requested change*
 - *Description of reason for the request*
 - *Contact of person requesting the change*
 - *Priority of the change (High, Medium or Low)*
 - *Impact on the deliverables (how will it change the budget, quality, deliverables, schedules)*
 - *The date by which the change is needed*
 - *Approval of request (who approves to keep change moving forward)*
 - *Task/activity/scope impacted (explain or estimate how the scope will be impacted by the change)*

- *Impact on the final project end date*
- *Cost involved (estimate cost of the change)*
- *Quality evaluation (assess how the quality of the deliverables or outcomes might be impacted, improved or not by the change)*
- *Estimate time it will take to implement the change*
- *Risk – the risk is to be documented in the Appendix and a statement in this section stating risk will then be transferred to the Risk Management Plan for further management with a date (Appendix)*
- *Approved/denied with justification*
- *Signatures (approval/denied, decisions made and signed by appropriate parties)*
- *Alternatives and recommendations (other options, if denied)*
- *A change request log including:*
 - *Action taken*
 - *Description of how project and project objective achieved or modified*

An example of the purpose statement is provided. Accept variations of the following:

'The purpose of this section is to describe the processes by which the project scope is controlled during the life of the project including ongoing reviews, maintenance and management of the project scope.

The change process is for making any changes to the project scope baseline. It is concerned with factors creating change that lend benefits to the project, determining if the scope has actually changed and managing the change as it occurs.

The scope change control management plan will include details for how to request a change to the project scope statement or the WBS after their initial approval, how the change is reviewed, how it will be approved/denied and the communication method (email) used to inform relevant persons of the change outcome. It includes information on the outputs of the scope change control such as scope change processes and documentation, corrective actions and lessons learned.

The Project Manager is responsible for continuously reviewing the project work to ensure it is being performed within the project scope outlined in this plan. In addition, the Project Manager is to use regular meetings with individual project teams to ensure all work is being carried out as required in support of the project deliverables and objectives and in turn the project deliverables and objectives.

Any requests to changes to the scope of the project after it has been initially approved is to follow the change management procedure.

Proposed project scope changes will be reviewed. If the Project Manager and the Project Sponsor determine the request is necessary or has merit, it will be analysed for its impact on the project's budget and time. If required, a risk assessment of the change to the scope will be undertaken.

If the change is approved by the Project Manager and the Project Sponsor, the projects WBS will be updated and the baseline realigned. The project schedule and requirements may need to be updated and realigned to current information.

The change request template and change request log is available in Appendix XX.'

The student may choose to use a flow diagram to illustrate the process and support their description. This is acceptable.

7 Scope Verification

<<Describe the purpose of this section and what information it includes.>>

The student is to include in this section:

- A reason as to why scope verification is important e.g. if work is allowed to proceed that is not aligned with the original project scope and intent the project may fail.
- The techniques used to determine the cause of the difference and degree of difference (if any) e.g. inspection including processes for measuring, examining and testing – walk throughs, audits, product reviews
- When corrective or preventative action is required
- A description of the process to establish the document level and extent of completion if the project is terminated/finalised early

An example has been provided. Accept variations of the following.

Scope verification covers how to formally verify the project and subsidiary project scope by the stakeholders where applicable to ensure all the project outcomes and deliverables are aligned with the original project scope. It should include a reason about its importance.

The section includes information about the technique used to determine the difference and the degree of difference between the scope baseline and the actual performance of the project. It also has information about when corrective or preventative action may be required, e.g. quality issues. If the project is finalised or terminated early, the scope verification process should establish and document the level and extent of the completion

The project development scope management plan was developed to ensure the project work and the individual projects under the project directly support the scope of the project. Without this surety, it is highly likely the project deliverables will not be met and the projects under the project and the project itself will be unsuccessful.

Throughout the project, the Project Manager must verify any interim deliverables against the scope specified in the initial agreement of the project scope statement, WBS and WBS dictionary. Once the Project Manager verifies the work required is performed as required, the deliverable can be accepted.

Once deliverables are accepted by the Project Manager, they are to be submitted to the Project Sponsor for formal acceptance of the deliverable.

8 Scope Project Management Plan Approval

<<Describe the purpose of this section and what it includes. Complete the table as necessary.>>

Name	Title	Signature	Date

The student must:

- Include a statement explaining the reason for approvals for the project management plan and signatures of the Project Manager and Project Sponsor
- A signature section at the end of the document
- The name and title of the person's approving the document are to be entered in the table/shown.

An example has been provided. Accept variations of the following.

This section describes how approval is given for the content of the scope project management plan. The person's signatures will indicate their approval, understanding and acknowledgement of the project scope management plan.

By signing the document, the person indicates they understand the purpose of this document and agree to the formal project scope for the Expansion of Marino Enterprises Project

Appendix 1: Scope requirement traceability matrix

The student is to provide a scope requirement traceability matrix template. The format is of their own choosing i.e. spreadsheet or word processing table or similar. They must, at minimum, include the items as shown. Accept variations of the following.

- An Identifier (ID) – this needs to be a unique identifier
- Name of the requirement or code
- Description of the requirement (use a title that explains the requirement not the whole specification)
- Business need justification (short description linked to business objectives, needs, goals)
- Program objectives
- Source of request (person/department)
- WBS deliverable element (code)
- Test case/validation
- Action
- Status (active/finished)
- Comments

Appendix 2: Decision log

The student is to use a template of their own choice and spreadsheet or word processing software (or similar) to create a decision log template at minimum is to include:

- A unique identifier
- Dates
- The decision and a description
- The impact of the decision on the program
- Rationale behind the decision
- Location of documenting approval for the decision e.g. Minutes of Meeting
- Person responsible for implementing the decision
- Person accountable for the outcomes of the decision
- The priority of the decision (high, medium or low)
- Actions to be taken if necessary
- Status of the decision (not started, started, in progress)
- Date decision completed
- Notes about the decision or if the decision was changed and why
- Whether the decision will be/was escalated to upper management? (Y or N)

Accept variations of the following format:

Identifier	Date	Decision	Description	Impact	Rationale behind decision	Priority of decision			Status of decision			ETC
Unique for this decision	Date decision entered	The decision (4 or 5 words)	Brief description of decision	Brief description of impact if/if not decision is taken	Reason why decision needs to be taken	H	M	L	Not Started	In progress	Completed	

Appendix 3: Change Request Template

The student is to use a template of their own choice and spreadsheet or word processing software (or similar) to create a change request template and attach as Appendix 2.

The student must include on their form at minimum:

- Project name
- Project number or identifier
- Project manager
- Date change requested
- Who requested the change
- Description of the change
- Description for the reason for the request
- Impact analysis on the project
- Impact analysis on the work products
- Quality impact on the project deliverables
- Impact on the schedule
- Impact on the budget
- Whether the decision is approved/denied/approved with modifications or deferred
- Any additional comments
- Approvers name, date signed and signature line (approver is the project sponsor)

Appendix 4: Change Request Log

The student can use a template of their own choice and spreadsheet or word processing software (or similar) and attach as an Appendix

The following is an example of headings that might be used only.

Change request log for project scope management

ID	Change request name	Description of change	Status of change	Origin date	Closing date	Priority	Impact on Scope	Impact on Time	Impact on Budget	Follow up action	Responsible person	Comments

Appendix 5: Risk Assessment for Request for Change to Project Scope

The student is to add a risk assessment table for change. It is to be a simple table and not a full risk assessment as the Project Risk Assessment is completed as part of the Risk Management Plan

Risk	Date transferred to Risk Management Plan