Facility logo here

**Project Management Plan
for Implementation**

# Name of facility

**Document Revision Control**

**Document Author(s)**

**Creation Date**

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Revised by | Date | Revision Control | Revision Reason |
|  |  |  |  |
|  |  |  |  |

Published Aug 2015. Next review 2024. © State of NSW (Agency for Clinical Innovation) CC-ND-BY

# Contents

[Introduction 2](#_Toc424734841)

[Purpose of a project management plan for implementation 2](#_Toc424734842)

[Project implementation 2](#_Toc424734843)

[Aims and objectives 3](#_Toc424734844)

[Aim 3](#_Toc424734845)

[Project objective(s) 3](#_Toc424734846)

[Scoping the project 4](#_Toc424734847)

[Governance, roles and responsibilities 5](#_Toc424734848)

[Project team and steering committee 5](#_Toc424734849)

[Roles and responsibilities 5](#_Toc424734850)

[Project deliverables, scheduling and milestones 7](#_Toc424734851)

[Deliverables 7](#_Toc424734852)

[Milestones and timeline 7](#_Toc424734853)

[Budget 8](#_Toc424734854)

[Document approvals 9](#_Toc424734855)

# Introduction

## Purpose of a project management plan for implementation

A Project Management Plan is essential to any project especially during the implementation phase. Even though it is completed at the commencement of the implementation it should be a living document that evolves as the implementation progresses.

The purpose of the document is to:

1. Provide clarity on what is to be achieved by the project (aim, objectives and scope)
2. Detail who will be involved and their roles (governance, roles and responsibilities)
3. Define key project deliverables (deliverables, milestones and budget)

This plan is an agreement between the Project Lead, Sponsor, Project Team and other business unit managers associated with and/or affected by the project. This enables it to be used as a reference for any decision that is made on the project and for clarification of unclear areas.

## Project implementation

The implementation process can be organised into three equally important implementation phases. This document assists with providing a foundation to undertake these phases.

* **Plan:** includes all aspects of project management that relate to implementation.
* **Assess:** to inform implementation of the new model.
* **Operationalise:** changing current practice to meet the defined model.

# Aims and objectives

## Aim

This is statement of why the project is being undertaken. It is broad, high level and explains what you want to achieve out of the project. It should be between 1-2 sentences in length and align with the strategic direction of the organisation.

## Project objective(s)

The project objectives are how your project will be measured. State 4-5 objective(s) which will stem from implementation of the project.

Project objective(s) should be SMART:

* **Specific:** Identify the specific result to be realised, i.e. the problem, who it is to be achieved with and where
* **Measurable**: Define a method to monitor and measure progress in meeting the objective
* **Attainable:** Ensure the objective is achievable within timeframe and resources (i.e. Realistic)
* **Relevant:** Ensure the objective is the right one to achieve your goal
* **Timely:** Be certain to establish the time frame in which the objective is expected to be met.

## Case for Change

These are statements about why a project is required. What are the 5 most important facts people involved in the implementation need to be aware of to change?

It is important to ensure that these 3 focuses are considered:

1. Health outcomes
2. Consumer and staff experience
3. System efficiency

# Scoping the project

A clear and concise definition of scope is the key to the success of your project. Its purpose is to aid in establishing realistic work plans, budgets, schedules, and expectations. The scope will be determined by the objectives.

A well-defined scope will prevent the occurrence of “scope creep” and never-ending projects. Should identified work arise that falls outside the defined scope, the Project Lead in conjunction with the Sponsor must either deem the work out of scope and defer it, or expand the scope of the project to include the work. The latter choice would result in formal changes to the work plan, resource allocation, budget and/or schedule and must be endorsed by the sponsor.

This preliminary scope statement is exactly that: preliminary. All of this information will be expanded upon in greater detail as the project moves forward and evolves. You can use the breakdown in the following table to identify a comprehensive scope. State specifically what will be included in your project implementation and what will not be included.

|  |  |  |
| --- | --- | --- |
|  | In | Out |
| Patient |  |  |
| Process |  |  |
| Organisation |  |  |
| Technology |  |  |
| Facility |  |  |
| Other |  |  |

Each project occurs in a specific environment impacting on its activities and outcomes. State here assumptions, constraints and external dependencies that will / may impact on the project.

|  |  |
| --- | --- |
| Assumptions | Describe any assumptions made about the project in relation to resources, scope, expectations, schedules, etc. Assumptions should be specific and measurable. These assumptions are what the Project Lead / team expects to have or be made available without anyone specifically stating so (resources, access to staff and information, etc.). |
| Constraints | Describe the principal constraints and limitations under which the project must be conducted. Constraints will relate to the project environment or parameters (timeframes and deadlines, funding, knowledge/skill level of the project team, resource availability, etc.). |
| External dependencies | Dependencies are defined as actions, deliverables or pre-conditions that are outside the immediate scope of the project or the Project Lead’s span of control and that impact / determine the project’s successful completion. They are not to be confused with the normal activities and logical relationships that exist between different project activities. |

# Governance, roles and responsibilities

## Project team and steering committee

|  |  |
| --- | --- |
| Name | Position |
| Project Sponsor |
|  | *The person in the organisation that is required to provide an active leadership role* |
| Project Lead |
|  | *The person responsible for daily management of the project* |
| Clinical Lead |
|  | *A person with clinical expertise within the required area, who believes in the project* |
| Steering Committee (may/may not be required) |
|  | *A group that provides high level advice on the project* |
| Project Team |
|  | *A group that have a key interest in the project or hold a position of influence* |
| Redesign Lead |
|  | *There is a redesign lead position in each LHD/SHN with specific expertise in the areas of project management and implementation* |
| Process Owners |
|  | *The people that hold influence over each process in the change* |
| Others |
|  | *The people involved with the project on a regular basis* |

## Roles and responsibilities

Identify the Governance roles that will be required for the successful completion of the project and briefly state their key responsibilities. Having identified the people in the above table, have them initial the final column of the below table, demonstrating their agreement.

| Roles | Governance Responsibilities  | Project Responsibilities | Initials |
| --- | --- | --- | --- |
| Project Sponsor  |  |  |  |
| Project Lead  |  |  |  |
| Clinical Lead |  |  |  |
| Steering Committee |  |  |  |
| Project Team |  |  |  |
| Redesign Leader |  |  |  |
| Process Owners |  |  |  |
| Others (specify) |  |  |  |

Please use the non-exhaustive list of responsibilities provided below to guide you in populating the table – please delete the list after completing the table.

**Vision and leadership**

* Set top-down objectives and vision for the project
* Keep the project aligned with the organisation's strategy
* Review & approve recommendations and make decisions
* Provide project leadership
* Sign off deliverables / milestones

**Risks and compliance**

* Responsible for project compliance with organisation’s policies and procedures
* Resolve project risks and issues escalated
* Manage complaints
* Remove Project Barriers
* Escalate risks / issues not being managed
* Identify and escalate risks
* Advise on ethic / privacy and other requirements according to their expertise
* Provide specialised information e.g. clinical services and ‘best practice’

**Stakeholders Management and Communication**

* Manage communications to stakeholders + feedback
* Organise working parties (as required)
* Determine appropriate stakeholders involvement
* Manage stakeholders
* Express, model and reinforce the change to direct reports
* Assign project roles and responsibilities
* Act as reinforcing sponsor for change implementation

**<<INSERT GOVERNANCE CHART>>Project schedule, resources and organisation**

* Authorise resources and allow modifications
* Validate decisions, including scope modification
* Ensure schedule is respected
* Monitor budget
* Report project outcomes
* Monitor project performance
* Manage scope
* Plan and execute the project
* Participate directly on working parties as needed
* Provide coaching and guidance with project methodology
* Execute / follow methodology, deliverables, change strategy implementation plans, etc.
* Accountable for tasks allocated
* Organise procurement (if applicable)
* Provide access to data / patients records

**Other implementation responsibilities**

* Determine implementation approaches
* Responsible for the implementation
* Implement project solutions
* Ensure quality objectives are achieved
* Accountable for the Implementation
* Responsible for the implementation
* Facilitate change on a local level

# Project deliverables, scheduling and milestones

## Deliverables

Tangible products generated as part of the project are deliverables. Include in this section a list of the deliverables and their contents (if appropriate) to be produced during the project. Some deliverables may be known at the beginning of the project however others will only become apparent during the operationalise phase of implementation. This table can be updated with specific deliverables agreed upon by the Project Lead and Project Sponsor.

| Deliverable | Description | Estimated Date |
| --- | --- | --- |
| Project deliverables |
| *Project Management Plan* | *Scoping document outlining shared understanding of project.* |  |
| *Evaluation Plan* | *A document detailing how the project will be evaluated throughout the life of the project.* |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Milestones and timeline

Whereas a deliverable identifies a tangible product developed during a project, a milestone is a point in the project that represents a time where a group of tasks or activities have been undertaken to reach this point. This can be represented in a timeline or on a Gantt chart (this can be completed in programs like MS Project, Visio or Excel). An excel version is available from the ACI Implementation Team.

# Budget

Include all resources and costs related to the project. These can be:

* workforce and resources
* administrative time, meetings and project management task time
* travel and accommodation
* IT, infrastructure, equipment and other material needed
* printing and overhead costs
* training
* catering, room booking, etc.

| Description | Labour / Materials |
| --- | --- |
|  | Quantity | Unit Cost | Total |
|  |  |  | 0 |
|  |  |  | 0 |
|  |  |  | 0 |
|  |  |  | 0 |
|  | Total | 0 |

# Document approvals

This signature page is to indicate approval for the Project Management Plan. It signifies that all parties have reviewed the Plan and agree with its contents.

Version approved: \_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
|  |  |
| Project Lead (Name / Position / Signature) | Date |
| Project Team Members (Name / Position / Signature) | Date |
|  |  |
| Project Sponsor (Name / Position / Signature) | Date |
|  |  |
| Other Groups | Date |