

## APPENDIX C. SAMPLE CVISN STATE PROJECT PLAN OUTLINE

This outline is provided as guidance for the breadth and depth of information that should be included in a state CVISN Project Plan. In practice, a Project Plan may be published formally at the beginning of each project, and then be maintained as an informal “living” document focused on the phased development of incremental capabilities. As such, a Project Plan often evolves into a collection of historical information, fairly short-term plans, and current status. Additional detailed planning must be accomplished as part of the phased development process.

Please see Appendix B in the CVISN Guide to Phase Planning and Tracking [44] for ideas about maintaining a Project Leader’s Notebook. It is convenient to keep the Project Plan in a three-ring binder, or its electronic equivalent. Segregate historical from current information so that you don’t keep flipping through material you don’t care about at the moment.

### Sign-Off Page

*At the project level, there are two motivations for getting signatures for the plan: to get the commitment from people who will actually do the work, and to get the endorsement of their commitment from their bosses. This page, together with the budget allocation, staffing plan, and project phase objectives, may be something you turn into a memo that you distribute at the start of each new phase to reconfirm everyone’s commitment.*

### Cover Page

### Table of Contents

#### 1. Project Executive Summary

*Imagine you are writing it for the person who controls your money, and for the line managers your team members report to. Keep this up to date because you may be asked for a project summary on short notice, for some other venue. Check off the objectives as they are met.*

#### 2. Introduction

*Help the reader fit this project into a broader context. Explain how this project fits into the overall CVISN program and into your state’s existing systems and strategic plans.*

### 3. Project Objectives

*The overall CVISN program has objectives stated in the Program Plan. This project's objectives support the program's objectives and can be stated in terms more specific to the functional area the project is related to. Use language that makes sense not only to the project team but also to the ultimate end-users.*

### 4. Project Requirements and Design

- Narrative and illustrations that summarize the key features of the system components in this project.
- Current State System Current Physical Design.
- Proposed State System Design.
- Proposed Physical Design.
- For the preceding 3 items, you might want to show only the components that are involved in this project.
- Reference the relevant parts of your State CVISN System Design Description. Redline or update this companion document as you implement each phase.

*On the one hand, this plan should stand on its own; on the other hand, it should not unnecessarily duplicate information better captured elsewhere. This chapter is a place to reference other documents which explain requirements and design. For each phase, expect that more detailed requirements and design need to be fleshed out.*

*Make use of diagrams and charts – they are powerful tools for communication, and are easier to maintain than extensive prose.*

### 5. Project Work Breakdown Structure

- Graphical representation of up to 5 levels of detail.
- Indented list format for all details.

*The top element (level 1) is the project name itself. A graphical view of the WBS is useful for about 5 levels at most; beyond that an indented list is easier to follow. Develop the WBS using a tool that lets you view the information in different formats, sort on different fields, hide classes of information without deleting it, etc. Stay in synch with any programmatic WBS numbering system.*

*During early project planning, sufficient detail needs to be shown to determine budget and staffing needs for the project. The complete details for later phases can be supplied during phase planning.*

## 6. Project Organization Structure

- Project Organization Chart of team members.
- Include both state and contractor employees, as well as contributing stakeholders.

*The entire project team is shown on this chart or series of charts. The Project Leader is shown on both this chart and on the State CVISN Program-level Organization Chart.*

## 7. Project Work Assignments

- Map the WBS tasks to the individuals in the responsible line organizations.
- Map the WBS tasks to contractors and the responsible individuals in those companies.

*The result is a matrix in which each row represents a task, and the columns contain the name of the responsible agency and person.*

*Each task should be assigned to the individual responsible for completing it. If an individual cannot be identified for a task that is far in the future, then show the element of the organization the task is assigned to.*

## 8. Project Processes

- Deviations from program processes.
- Project-specific processes.

*Everyone on the project should have the same understanding of how they are going to get the job done. Process descriptions should be as simple and concise as possible. References to existing documents that everyone on the team already has access to may be inserted, instead of copying the process descriptions into this chapter.*

## 9. Project Detailed Schedule and Milestones

- Major Project Milestones.
- Project Phase/Build Charts.
- Reference to location of computer files for latest versions of files, which may change often.

*The project's phases may or may not align exactly with the program's phases. During each phase, there are specific objectives for each project, noted on a Project Phase Chart for that phase. Achieving the new or improved capabilities may require synchronized accomplishments in multiple sub-projects corresponding to different products.*

*It is useful to have one or two milestones each month or so, to indicate how the project's phased objectives will be achieved. Working-level schedules in activity network or Gantt chart format are not part of the document, but do need to be developed, preferably using a desk-top scheduling tool. The CVISN Guide to Phase Planning and Tracking [44] offers advice about the detailed planning and monitoring that occurs during development and deployment.*

## 10. Project Budget Details

- WBS element costs.
- Personnel, subcontract, procurement, and other direct costs phased over time to show staffing requirements and cash flow.
- Summarized costs for each fiscal quarter, as funding may be done by quarter.

## 11. Project Products

- Table of significant hardware items for this project, including warranty requirements.
- Table of significant software components for this project. Do you have access to the source code?
- User and maintenance manuals.
- Table of significant deliverable design documents.

*The product lists should be folded into the WBS as tasks so that they appear in the assignments, costs, and schedules. Listing them separately in this plan is useful as a crosscheck against the details of the project task lists. Be sure to address intellectual property rights, such as the state's ability to modify source code.*

## 12. Project Issues to be Resolved

*There may not yet be any. If there are some high-risk items, note them here, along with your plans for risk mitigation. As the issues are settled, it is handy to write a quick note about how they were resolved.*

### Potential Appendixes:

- Definitions of acronyms.
- Team member list with addresses, telephone numbers, e-mail.
- Previous, related plans and reports needed for ready reference.
- Any other information too detailed for the main body of the document, yet necessary in order to communicate fully.

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