

# Appendix B

## Sample Project Management Forms

Here are the forms covered throughout *Project Management JumpStart*. You can use them as is or adapt them to your particular project needs.

Project concept document (from Chapter 3):

Project Concept Document	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Requestor name: _____	Date of request: _____
Requestor's contact information: _____	
Section One — To be completed by the requestor	
<b>II. Business Justification</b>	<i>State the reason this project is needed and what problem or issue the project will resolve. Describe the impacts to the organization if the project is not approved.</i>
<b>III. Project Description</b>	<i>Provide a high-level overview of the project objectives. Include a brief list of desired project outcomes.</i>
<b>IV. Project Costs</b>	<i>Provide high-level estimates if known.</i>
<b>V. Timeframe</b>	<i>Is there a critical completion date? Y/N      Date required: _____</i> <i>Desired completion date if not critical: _____</i>

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Section Two — To be completed by the business unit manager or project manager

VI. Planning Estimates *Provide a high-level estimate of project completion.*

VII. Business Areas Impacted *List all business units impacted by this project.*

Section Three — To be completed by the review committee

VIII. Selection Committee Review

*Date of review:*

*Comments:*

*Project reviewed/denied:*

*Project priority:*

IX. Signatures of Review Committee

Project charter (from Chapter 3):

Project Charter	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Sponsor name: _____	Date: _____
<b>II. Project Overview</b>	<i>Describe the product or service of the project, the reason the project was undertaken, and the purpose of the project.</i>
<b>III. Project Objectives</b>	<i>Describe the overall objectives of the project and what factors will determine the success of the project.</i>
<b>IV. Requirements</b>	<i>Describe the expectations and requirements of the customer, sponsor, and stakeholders.</i>
<b>V. Business Justification</b>	<i>State the reason this project is needed and what problem or issue the project will resolve. Describe the impacts to the organization if the project is not approved.</i>
<b>VI. Resource Costs and Estimates</b>	<i>Provide cost estimates if known, including monies already expended such as a feasibility study or consulting time.</i>
<b>VII. Roles and Responsibilities</b>	<i>List the stakeholders and their responsibilities.</i>
<b>VIII. Signatures</b>	<i>Include signature lines for the project sponsor, project manager, key stakeholders, customers, and vendors.</i>
<b>IX. Attachments</b>	<i>List the attachments to the charter here.</i>

Project kickoff meeting agenda (from Chapter 3):

Project Kickoff Meeting Agenda

**I. General Information**

Project name: \_\_\_\_\_ Project number: \_\_\_\_\_  
Project Manager name: \_\_\_\_\_ Date: \_\_\_\_\_

**II. Agenda Items**

1. *Introductions*
2. *Project charter*
3. *Project purpose*
4. *Project objectives*
5. *Roles and responsibilities*
6. *Questions*

Project scope statement (from Chapter 4):

Project Scope Statement	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Project Manager name: _____	Date: _____
<b>II. Project Overview</b>	<i>Describe the product or service of the project, the reason the project was undertaken, and the purpose of the project.</i>
<b>III. Project Goals and Objectives</b>	<i>Describe the project goals using the SMART (Specific, Measurable, Accurate and Agreed to, Realistic, Time Bound) formula. These goals will be used to measure and determine the project's success at its conclusion.</i>
<b>IV. Comprehensive List of Project Deliverables</b>	<i>These are the products or services that must be produced in order to fulfill the goals of the project. Deliverables should have measurable, verifiable results and outcomes. Identify critical success factors.</i>
<b>V. Comprehensive List of Project Requirements</b>	<i>Requirements are the specifications of the deliverables.</i>
<b>VI. Exclusions from Scope</b>	<i>List all deliverables or requirements that are not part of this project.</i>
<b>VII. Time and Cost Estimates</b>	<i>Include initial estimates of time and resources. These are estimates only and will be updated after additional project planning activities are completed.</i>
<b>VIII. Roles and Responsibilities</b>	<i>Include a roles-and-responsibilities chart, detailing project responsibilities.</i>
<b>IX. Assumptions</b>	<i>List all project assumptions.</i>
<b>X. Product Acceptance Criteria</b>	<i>List all project acceptance criteria.</i>
<b>XI. Constraints</b>	<i>List all project constraints.</i>
<b>XII. Signatures</b>	<i>Include signature lines for the project sponsor, project manager, key stakeholders, customers, and vendors.</i>







Quality management plan (from Chapter 8):

Quality Management Plan	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Project Manager name: _____	Date: _____
<b>II. Project Overview</b>	<i>Provide an overview of the project, including its primary goals.</i>
<b>III. Quality Standards and Regulations</b>	<i>Note any quality policies, standards, or regulations the project team will be required to follow.</i>
<b>IV. Quality Criteria</b>	<i>Provide a detailed list of the quality criteria needed to consider the deliverables complete and correct. Include each deliverable and its quality criteria.</i>
<b>V. Quality Assurance Procedures</b>	<i>List the activities and processes that will be used to monitor adherence to the quality criteria.</i>
<b>VI. Quality Management Roles and Responsibilities</b>	<i>Include a roles and responsibility chart detailing who's responsible for which quality activities.</i>
<b>VII. Signatures</b>	<i>Include signature lines for the project sponsor, project manager, and those responsible for quality assurance and review.</i>

Project status report (from Chapter 10):

Project Status Report	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Project Manager name: _____	Report period ending: _____
<b>II. Progress Made Since Last Reporting Period</b>	
<b>III. Scheduled and Actual Completion Dates</b>	
<b>IV. Progress Expected This Reporting Period Not Completed</b>	
<b>V. Progress Expected Next Reporting Period</b>	
<b>VI. Issues</b>	



Change request form (from Chapter 11):

Change Request Form	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Requestor name: _____	Requestor's contact information: _____ Date of request: _____
Change request tracking number: _____	Date request approved/denied: _____
Section One—To Be Completed by the Requestor	
<b>II. Description of Change Request</b>	<i>Include a detailed description of the requested scope change.</i>
<b>III. Business Justification for Change</b>	<i>Describe how the business, project, or product will benefit from the requested change.</i>
<b>IV. Impacts of Not Making the Change</b>	<i>Describe how the business, project, or product will be impacted if the change is not made.</i>
<b>V. Alternatives to Change</b>	<i>Describe any known alternatives to the change.</i>
Section Two—To Be Completed by the Project Manager	
<b>VI. Impacts of the Change</b>	<i>Describe the impacts of this change to the project schedule, budget, and quality.</i>
<b>VII. Alternatives to Change</b>	<i>Describe alternative solutions to the change.</i>
<b>VIII. Recommendation to the Change Control Board</b>	<i>Describe the project manager's recommendation to approve or deny the change. Include justification for the recommendation.</i>
Section Three—To Be Completed by the Change Control Board	
<b>Recommendation:</b>	<i>Include a discussion concerning the goals of the project. Does this change significantly impact the goals of the project such that the project goals can no longer be met?</i>
<b>Date of Review:</b>	<i>Should this change be considered a new project or phase two of the existing project, etc.?</i>
<b>Signature:</b>	

Final status report (from Chapter 12):

Final Status Report	
<b>I. General Information</b>	
Project name: _____	Project number: _____
Project Manager name: _____	Date of report: _____
<b>II. Project Overview</b>	<i>Describe the final product or service of the project, the reason the project was undertaken, and the purpose of the project. Include a description of the business problem that was solved by implementing this project.</i>
<b>III. Project Goals and Objectives</b>	<i>Identify the goals that were met during this project and compare them to the goals on the scope statement.</i>
<b>IV. Project Deliverables and Milestones</b>	<i>Identify the major deliverables or milestones met, their due dates according to the final plan, their actual delivery dates, and stakeholder acceptance dates.</i>
<b>V. Project Budget</b>	<i>Give a final overview of the project budget and variances from the budget.</i>
<b>VI. Quality Assurance</b>	<i>Document acceptance of the quality criteria and inspections.</i>
<b>VII. Comments</b>	<i>Include any information that reminds stakeholders of agreements made concerning deliverables that were moved to phase two of the project, major problems that were encountered and how they were resolved, risk events that need further explanation, and so on.</i>
<b>VIII. Final Acceptance and Signatures</b>	<i>Provide a way for each stakeholder to indicate their acceptance of the project and sign their name.</i>
Accept/Decline	Stakeholder name _____

