

Project Statement

A. General Information

Information to be provided in this section is general in nature and quickly provides the necessary information pertaining to the organization of the project and project participants.

Project Name:	<input style="width: 95%;" type="text"/>	Date:	<input style="width: 95%;" type="text"/>
State organization:	<input style="width: 95%;" type="text"/>	Submitted By:	
		Version:	

Please answer the following questions by marking "Yes" or "No" and providing a brief response as appropriate

	Yes	No
Is this an updated Project Statement? Is so, reason for update: _____ _____	<input type="checkbox"/>	<input type="checkbox"/>
Is concept development effort funded? If yes, how much _____	<input type="checkbox"/>	<input type="checkbox"/>
Is this follow-on to a previous project? If "yes," please provide: Name of previous project: _____ Date Completed: _____	<input type="checkbox"/>	<input type="checkbox"/>

Points of Contact.

Please list the individuals who will be responsible for this project during its initial conceptual and planning stages, as appropriate. This will be the group of individuals that meets to review and discuss the project statement and sizing.

Position	Name/Organization	Phone	E-mail
Project Manager			
Senior Management Sponsor			
Senior Technical Sponsor			
Quality Manager			
Procurement Contact			
Steering Committee			
Stakeholders			
Project Team			
Implementation Consultants			
Marketing Team			

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B. Project Charter:

Business Problem.

Provide a brief concise description of the business problem.

1.

Statement of Work (Goal).

The statement should be short, precise and clear.

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Project Objectives:

Provide a brief list of what the project is to accomplish. The project objectives are a detailed version of the statement of work. Taken with the statement of work, the objectives define the boundaries (scope) of the project. The objective statement can also be seen as a decomposition of the statement of work into a set of necessary and sufficient objective statement.

Objectives may include both short and long-term objectives.

1.

C. Success Factors:

List factors that will be used to determine the success of the project. This part of the project statement should answer the question, "How do we know it the project was successful?" It is essential that the criteria be quantifiable and measurable. Short-term success factors are used to determine if a project is complete.

Short Term	•
Long Term	•

D. Strategic and Background Information:

Please answer the following questions by marking "Yes" or "No."

	Yes	No
Is the project consistent with the state organization Business Plan? If not, why not? _____ _____	<input type="checkbox"/>	<input type="checkbox"/>
Is the project identified in the state organization IT strategic plan? If not, why not? _____ _____	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Business Area or IT Area Impacted. Check all appropriate functions.

Project Management	Planning	Document Tracking	Program-specific Data Management system
Human Resources	Procurement	Workflow Management	Help Desk
Financial	Year 2000	Desk Top Productivity	

Other Business Functions:

Types of Technology. Identify technology areas that might apply to this project. Check all appropriate categories.

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SQL Database		Real Time		Expert System		LAN	
Client Server Architecture		Imaging		WAN/Internet		Desktop application	
Main Frame Solution		Electronic Data Interface		C.A.D.		Other	

Other Technology Areas:

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E. Planning Budget:

A small amount of high-level planning information should be provided with this project statement if any sizable effort of business analysis needs to be completed. If not, this section may be omitted. Provide a list of activities to complete the concept and planning phases. There should be approximately 2 to 10 tasks. The # column at the far right contains the location number describing how the figures were determined. A prefix of A indicates the item is in section J Assumptions. A prefix of W indicates the item can be found in a draft WBS attached to the project statement. The grid shown below is a Microsoft Excel spreadsheet object embedded in the Microsoft Word document. Double click on the grid to access the cells of the spreadsheet.

Estimated Hourly Rate \$25

Activity #	Activity Description	# of Days	Hours	Estimated Cost	Milestone	#
100	Requirements Phase			0	Requirements doc.	2
110	Design Phase			0	Design document	3
Subtotals		0	0	\$0		
Months (20 work days/month)		0.00				
New funding expenditures					Annual \$/Maint.	
A	Computer Hardware					4
B	Computer Software					5
C	Contractual Services					6
D	Freight					7
E	Other Supplies/Materials					8
F	Salaries & Wages (prorated for project)					9
G	Staff Training					10
New funding total				\$0	\$0	

Attach a schedule for these tasks if available.

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F. High Level Plan

Use the following table to estimate the overall cost of the proposed project after the project plan is approved. Remember that these cost figures are to be general estimates. The detailed project plan will follow in the planning phase. The # column at the far right contains the location number describing how the figures were determined. A prefix of A indicates the item is in section J Assumptions. A prefix of W indicates the item can be found in a draft WBS attached to the project statement. The grid shown below is a Microsoft Excel spreadsheet object embedded in the Microsoft Word document. Double click on the grid to access the cells of the spreadsheet.

Estimated Hourly Rate **\$25**

Activity #	Activity Description	# of Days	Hours	Estimated Cost	Milestone	#
200	Execution Phase			0		11
210	Closeout Phase			0	SC approval	12
	Subtotal staff hours	0	0	\$0		
	Months (20 work days/month)	0.00				
	New funding expenditures				Annual \$/Maint.	
H	Computer Hardware					13
I	Computer Software					14
J	Contractual Services					15
K	Freight					16
L	Other Supplies/Materials					17
M	Salaries & Wages (prorated for project)					18
N	Staff Training					19
	New funding total			\$0	\$0	

Attach a schedule for these tasks if available.

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G. Planning Financial and Schedule Information: (based on the high level plan)

<i>Estimated Budget (+/- 5%)</i>	<i>Low: \$ High: \$</i>	<i>Estimated Start Date: (Qtr. and calendar Yr.)</i>	
<i>Estimated Length (Months)</i>		<i>Estimated Completion Date: (Qtr. and Yr.)</i>	
<i>Fiscal Year 1 Dollars</i>		<i>Fiscal Year 2 Dollars</i>	

H: Other related information:

1.

I: Overall phases of work and expected timeframes:

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J: *Related assumptions:* (once created, assumptions are not to be renumbered as they are referenced elsewhere)

1. Assumptions 2 through 19 relate to specific lines in the Planning Budget and High Level Plan. These assumptions will be BLANK if the corresponding lines in the Planning Budget and High Level Plan do not have costs or time associated with them.

Unless otherwise indicated staff costs for both the Planning Budget and the High Level Plan are calculated at \$200 per day or \$25 per hour and work weeks are based on 5 working days.

2. Planning Budget – Requirements Phase (100)

This section includes all kickoff activities, requirements meetings, vendor presentations, project team meetings, steering committee time, project manager time, and technical lead time in coordinating and leading the project. See WBS for additional detail.

3. Planning Budget – Design Phase (110)

This section includes all meetings of the project team, project manager, steering committee, and technical lead in the development and approval of the design. See WBS for additional information.

4. Planning Budget – Computer Hardware (A)
5. Planning Budget – Computer Software (B)
6. Planning Budget – Contractual Services (C)
7. Planning Budget – Freight (D)
8. Planning Budget – Other Supplies /Materials (E)
9. Planning Budget – Salaries & Wages (prorated for the project) (F)
10. Planning Budget – Staff Training (G)
11. High Level Plan – Execution Phase (200)

This section includes all kickoff activities, , acquisition, training, project team meetings, steering committee time, project manager time, and technical lead time in coordinating and leading the project. See WBS for additional detail.

12. High Level Plan – Closeout Phase (210)

This section includes all closeout activities, project archiving, and lessons learned sessions.

13. High Level Plan – Computer Hardware (H)
14. High Level Plan – Computer Software (I)
15. High Level Plan – Contractual Services (J)

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16. High Level Plan – Freight (K)

Included in hardware costs.

17. High Level Plan – Other Supplies/Materials (L)

18. High Level Plan – Salaries & Wages (prorated for the project) (M)

19. High Level Plan – Staff Training (N)

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Document Change History

Changes in document <version> - <date> - <initials>

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