Read through this scope management template and complete it, check back in with the knowledge module if you need to. Complete the scope management template, using the assessments completed in previous units, such as the WBS, risk management template, etc. Consolidate your responses to earlier assessments.

Assessor to check that all of the tables have been accurately completed.

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| **Project Name:**  **Project Number:**  **Prepared By: Author’s Name Here**  **Last Revised On: (Insert Date)** |
| **Scope Management Plan**  **Management Approach**  The term “project scope” refers to the sum of all products, services and results that will be provided as the project.  The purpose of this scope management plan is to set forth the plans and procedures for defining, developing, monitoring, controlling, changing, implementing and verifying the project scope. It’s the intent of scope management to ensure the completion of all the work required, and only the work required, to complete the project successfully.  The project manager will assume overall responsibility for project scope management. The people listed below will assume the following scope management responsibilities:   |  |  | | --- | --- | | Names / Roles | Responsibilities | | Project Manager |  | | Project Sponsor |  | | Project Team Lead |  | | Project Team Members |  | |  |  | |  |  |   **Scope Development**  Sources  The scope of this project is defined in the Scope Definition section, below. Development of the project scope began with an examination of the following sources:   1. Project Charter 2. Applicable codes, regulations, statutes and laws 3. Stakeholders   Collect Project Requirements  The complete requirements gathering and definition process is described in the Requirements Management Plan and all known project requirements are set forth in the Requirements Traceability Matrix. The Requirements Traceability Matrix is included in the Requirements Management Plan.  Scope Definition  The project scope baseline is comprised of the project scope statement, the work breakdown structure and the WBS dictionary, below.  **Project Scope Statement**  The project scope statement is included below as an attachment.  **Work Breakdown Structure (WBS)**  The work breakdown structure (WBS) is included as an attachment.  **WBS Dictionary**  The WBS dictionary is included below as an attachment.  *Scope Validation*  Scope validation refers to the process of verifying and formalizing acceptance of the completed project deliverables. A list of the project deliverables can be found in the project scope statement, included below in Attachment A and in the Deliverables Acceptance and Rejection Log included as Attachment F.  **Scope Verification**  Describe how the deliverables will be verified against the project scope. To whom will the deliverables be first presented for inspection and verification? Does the quality management plan address quality control processes? Are the control quality processes performed before scope validation or are those two processes performed in parallel?  Will anyone else be involved in verifying the deliverables? What are their roles?  When will scope verification be performed? How will the verification of deliverables be tracked?   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | WBS ID | WBS Name | Deliverable | Verified By | Variance | Notes | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |  |  |  |  |  |  |   **Deliverables Acceptance**  Describe the manner in which project deliverables will be formally presented and accepted. Will they be presented at the end of each phase? Will they be presented at regular intervals? Who will present the project deliverables and to whom will they be presented?   |  |  | | --- | --- | | Name / Role | Responsibility | |  | Verifies the project deliverables | |  | Presents the project deliverables | |  | Reviews the project deliverables | |  | Accepts or rejects the project deliverables |   Accepted Deliverables  Describe the process for accepting the project deliverables. Will the project deliverables become accepted in writing? Is a deliverable acceptance document in place?  Acceptance and rejection of project deliverables can be tracked below in Attachment F, Deliverables Acceptance and Rejection Log.  Rejected Deliverables  Describe the process for rejecting the project deliverables. What happens to rejected deliverables?  Acceptance and rejection of project deliverables can be tracked below in Attachment F, Deliverables Acceptance and Rejection Log.  *Scope Control*  Controlling project scope is the process of monitoring the status of the project scope and managing changes to the scope baseline.  **Monitoring**  Who is responsible for monitoring the project scope to ensure the project remains within the scope baseline? What processes will be used?   |  |  | | --- | --- | | Name | Scope Monitoring Activities | |  |  | |  |  | |  |  |   Work Performance Data  What work performance data will be captured? Who will track the number of change requests received? Who will track the number of deliverables completed?  Variance Analysis  Variance analysis is a technique used for determining the cause of any difference and the degree of any difference between the scope baseline and the actual performance. Describe the processes for performing variance analysis. When is corrective or preventative action required? Does the quality management plan speak to allowable variances?  **Integrated Change Control Procedures**  Use the sections below to describe the change control procedures for the project.  Written Requests  All requests for change must be submitted in writing, on the Change Request Form included as an attachment.  *A. Who May Submit Change Requests*  The following people may initiate changes to the project scope:  1. Project sponsor  2. Project Manager  3. Project team members  4. Other project stakeholders  *B. Deliver To*  All written requests for changes must be submitted to the project manager who will log and track each request on the Change Request Log included as an attachment.  Sizing  The project manager and select project team members will analyse the change requests for impact to schedule, cost and quality. Once the sizing is complete, the project manager will electronically submit each change request to all members of the change control board.  **Change Control Board**  Members of the change control board will evaluate each change request and decide whether it becomes approved, approved with modifications, rejected or deferred. Once a decision is reached, the change request is signed and emailed to the project manager for planning revisions and implementation.  The following people are members of the change control board:   |  |  |  | | --- | --- | --- | | Name | Role | Email | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  |  1. *Approved*   When a change request is approved, the project manager will track the approval on the change request log found in Attachment E, below. The project manager will also ensure implementation of the change, as it was submitted and approved.  Where implementation affects changes to the project management plan, the project manager will revise the plan and distribute notice of the revisions in accordance with the procedures set forth in the communication management plan.   1. *Approved With Modifications*   When a change request is approved with modifications, the project manager will track the modified approval on the change request log found in Attachment E, below. The project manager will also ensure implementation of the change, as it is modified.  Where implementation affects changes to the project management plan, the project manager will revise the plan and distribute notice of the revisions in accordance with the procedures set forth in the communication management plan.   1. *Rejected*   When a change request is rejected, the project manager will track the rejection on the change request log found in Attachment E, below and provide written notice of the rejection to the party who initiated the change. No further action will be taken.   1. *Deferred*   When a change request is deferred, the project manager will track the deferred request on the change request log found in Attachment E, below. The project manager will also notify the party who initiated the change request.  No other action will be taken unless the change control board later approves, approves with modifications or rejects the change request.  Assumptions  While defining and managing project scope, it’s inevitable that assumptions will be made. All assumptions regarding project scope will be documented here then transferred to the Risk Management Plan for further management.   |  |  | | --- | --- | | Assumption | Date Transferred to Risk Management Plan | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  |   **Issues**  While defining and managing project scope, it’s inevitable that issues will be encountered. All issues regarding project scope will be documented here then transferred to the Risk Management Plan for further management.   |  |  | | --- | --- | | Issues | Date Transferred to Risk Management Plan | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  |   **Risks**  While defining and managing project scope, risk may be identified. All risks regarding project scope will be documented here then transferred to the Risk Management Plan for further management.   |  |  | | --- | --- | | Risks | Date Transferred to Risk Management Plan | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  |   Plan Approval  By signing below, I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in my capacity as Project Sponsor approve of this Scope Management Plan.  Name:  Title:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature Date Approved    Attachments   1. **Project Scope Statement**   Attach project scope statement here.  **Work Breakdowns Structure (WBS)**  Attach the WBS here.  **WBS Dictionary**  Attach the WBS dictionary here.  **D. Change Request Form**  attach the change request form here.  **E. Change Request Log**  Attach the change request log here.  **F. Deliverables Acceptance and Rejection Log**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | WBS ID | Deliverable | Reviewed By | Accepted or Rejected | Notes | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |  |  |  |  |  | |