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## Project Planning Worksheet

Project Name:

Prepared by:

Department:

Date:

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### Background and Overview

Give the business reason for requesting this project, and an overview of the work to be completed.

### Risks of Not Doing Project

	Risk
1.	
2.	
3.	
4.	

### Project Team

Role	Name
Project Sponsor	
Project Manager	
Product Manager	
Business Owner	
Operations Owner	
Other Stakeholders (eg Clients)	

### Outcomes

List the desired outcomes of this project – what is the impact to clients? What is the impact to IT Services? What will be different once the project is completed?

	Outcome
1.	
2.	
3.	
4.	

### Outputs

List the specific deliverables of the project – what are key products, results or capability to perform a service that must be produced to complete the project

	Output	Description
1.		
2.		
3.		
4.		

## Project Metrics

What metrics can be tracked and obtained to ensure the Project Outcomes and Objectives are met, and that the project can be considered complete?

	Project Metric	Target
1.		
2.		
3.		
4.		

## Timeline

Provide major milestones in each of the project phases. \*\* Sample Milestones are included below – delete those that are not applicable and add others as appropriate \*\*

Project Phase	Major Milestone	Estimated Completion Date
<b>Initiation</b>	Charter Approved	
<b>Planning</b>	Kick-off Meeting	
	Requirements Document Completed	
	WBS/Project Plan Completed	
	Communications Plan Completed	
	Functional Specs Completed	
	Test Plans Approved	
	Security Review (if required)	
<b>Execution</b>	Equipment Ordered	
	Development/Install Completed	
	Acceptance Testing Completed	
	Final Acceptance	
<b>Monitor &amp; Control (Testing/QC)</b>	Integrated Testing Completed	
	Production Acceptance	
	Service/Product Launch	
<b>Closing</b>	Closing Meeting	
	Final Project Report	

## Project Scope

List the items that are both within the scope of this project as well as those that are outside the scope of this project

	In Scope
1.	
2.	
3.	
4.	

	Out of Scope
1.	
2.	
3.	
4.	

## Issues, Risks, and Mitigating Factors

List the project risks, the likelihood that it would occur, the probable impact (High, Medium, Low), and mitigation plans. These risks are defined as an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives.

	Issue/Risk	Likelihood (HML)	Impact (HML)	Mitigation
1.				
2.				
3.				
4.				

## Assumptions

Assumptions are factors that, for planning purposes, are considered to be true, real or certain without proof or demonstration

1.	
2.	
3.	
4.	

## Project Staffing

- Paste the Resource Worksheet based on the Template found here:
- (Paste here)
- Please delete blank lines before pasting

**<Copy and Past Resource Worksheet Here, or include separately>**

## Project Staffing - Outside Resources

Workgroup/Organization	# of Staff	% of Time	# of Mos	Skillset / Role / Individual

## Preliminary Budget

\*\* All projects must have a Preliminary Budget. Ongoing Data Center costs will be calculated later. \*\*

One-time Costs: \_\_\_\_\_

Ongoing Costs: \_\_\_\_\_

<b>One-time Costs</b>	<b>Project</b>	<b>Ongoing</b>
Internal Staff (from resource sheet)	\$ -	\$ -
Professional Services & backfill		
- Prof Services (identify)	\$ -	\$ -
- Other (identify)	\$ -	\$ -
Software Licensing	\$ -	\$ -
Non-capital Hardware & Equipment	\$ -	\$ -
Data Center Costs	\$ -	\$ -
Other	\$ -	\$ -
<b>Total One-time Costs</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Capital Costs</b>		
Capital HW & Equipment	\$ -	\$ -
<b>Total Capital Cost</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Incremental Ongoing Costs</b>		
Vendor Maintenance & License Fees	\$ -	\$ -
Software Licencing & Maintenance	\$ -	\$ -
Data Center Costs (will be validated by Finance)	\$ -	\$ -
Other	\$ -	\$ -
<b>Incremental Ongoing Costs</b>	<b>\$ -</b>	<b>\$ -</b>

## Data Center Planning:

	Number	Type
Estimated total # & type (UNIX, Windows) of Servers needed on an ongoing basis (dev, prod, test, others)		
Estimated amount of storage needed on an ongoing basis, and type (NAS, SAN, etc.)		

Any other specific needs (services) from the Data Center (eg loadbalancing, firewalls, etc)?	
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**Signatures:**

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**SPONSOR:** [name]

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[date]

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**PROJECT MANAGER:** [name]  
(if assigned)

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[date]