Project Initiation

[Project Name]

*Purpose of document*

* *Outline the objectives and core boundaries (scope, time, cost, quality) for the project*
* *Define how the project will be governed*
* *Define the approach that will be taken to business change and software development with reasons why*
* *Clarify roles and responsibilities for the project team and for project Board members*

Approvals

|  |  |  |
| --- | --- | --- |
| **Role** | **Name(s)** | **Date signed** |
| Project Sponsor | *e.g. Name &*  *Title* | *DD/MM/YYYY* |
| Senior User |  |  |
| Senior Supplier |  |  |

Table of Contents

[1. Exec Summary 3](#_Toc71197968)

[2. Objectives 3](#_Toc71197969)

[3. Strategy 3](#_Toc71197970)

[4. Desired Outcomes 3](#_Toc71197971)

[5. High Level Requirements 4](#_Toc71197972)

[6. Scope 4](#_Toc71197973)

[6.1 In Scope 4](#_Toc71197974)

[6.2 Out of Scope 4](#_Toc71197975)

[7. Costs 4](#_Toc71197976)

[7.1 Project Costs 4](#_Toc71197977)

[7.2 Ongoing Support Costs 4](#_Toc71197978)

[8. Benefits 5](#_Toc71197979)

[9. Risks and Constraints 5](#_Toc71197980)

[9.1 Risks 5](#_Toc71197981)

[9.2 Constraints 5](#_Toc71197982)

[10. Project Governance 5](#_Toc71197983)

[11. Plan 7](#_Toc71197984)

[12. Project Approach 7](#_Toc71197985)

[13. Stakeholders 7](#_Toc71197986)

[14. Roles and Responsibilities 8](#_Toc71197987)

Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Version number** | **Description of version change** | **Date** | **Author** |
| *e.g. v0.1* | *Initial draft* | *DD/MM/YYYY* | *Name* |
|  |  |  |  |
|  |  |  |  |

# Exec Summary

*[Provide a high level summary description of the background leading to the project being initiated. Summarise the objectives, scope, costs, timeframe, risks, constraints and benefits associated with the project and highlight any important points and exceptions that executives need to be aware of.]*

# Objectives

*[If this section has already been defined in a Project Brief, it can either be copied & pasted into this document or a hyperlink included here to link to that Project Brief.]*

*[Summarise the project’s end goal. What is it trying to achieve?]*

# Strategy

*[How does the project objective support and contribute to Trust strategy, any national directives and any directorate strategies within the Trust?]*

# Desired Outcomes

*[If this section has already been defined in a Project Brief, it can either be copied & pasted into this document or a hyperlink included here to link to that Project Brief.]*

*[What is the project sponsor / requestor trying to accomplish? What do they want the end state of play to be, what does their vision look like?*

*Desired outcomes will drive the project’s objective and solutions that it delivers, within tolerances set to contain the level of change expected]*

Strategic change

Desired outcomes

**Constraints**

that may

impact set tolerances

**Tolerances**

(Boundaries set on

scope, cost, time, quality)

Project objective

Solutions

Business change

# High Level Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement** | **Priority** | **Owner** | **Notes** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Must -** requirement must be satisfied to achieve project objectives

**Should -** high-priority requirement that should be included if possible within the delivery time frame unless workarounds are available and can be employed if project success is threatened.

**Could -** desirable or nice-to-have requirement (time and resources permitting) but project objectives can still be achieved without it being fulfilled

**Won’t -** a requirement that stakeholders ideally want, but have agreed will not be implemented by the project

# Scope

## In Scope

## Out of Scope

# Costs

## Project Costs

*[E.g. Software, Licences, Infrastructure, Resources, Supplier costs]*

## Ongoing Support Costs

*[Cost of contract for ongoing maintenance and/or support from supplier of any software / hardware provided. The first year of support costs are normally included within cost of project and funding secured for the project.]*

# Benefits

*[E.g. tangible, non-tangible, cashable, non-cashable, dis-benefits]*

# Risks and Constraints

## Risks

*[E.g. to project success, to wider Trust / directorate operations, to patient / clinical safety]*

## Constraints

*[E.g. what is happening elsewhere within the Trust or externally or on other projects that could threaten the success of the project and achieving its objective]*

# Project Governance

*[E.g. what body will be set up to govern the project and who will represent which areas and why.*

*If PRINCE2 aligned, think Project Board, Project Executive, Senior User and Senior Supplier roles and who bet to fulfil them. Describe methods and regularity of reporting, any governing bodies that the project’s governing body must in turn report into, and escalate exceptions to for decision-making. Consider who is accountable for decisions and who is responsible for informing those accountable so that effective fully informed decisions can be made. Reporting lines and project structure should include the project team and its makeup. Summarise roles and responsibilities for the governing body.*

*E.g. the Project Board will be expected to:*

* *Approve all major plans and resourcing (the Project Manager will provide appropriate plans for consideration)*
* *Authorise any significant deviation from plans and defined boundaries*
* *Approve the start and completion of each key stage of the project (stages will be defined in a Project Plan) and*
* *Communicate with other stakeholders and those higher in authority, e.g. to help remove barriers that threaten the success of the project*
* *Monitor that the project and its objectives remain viable through its lifetime*

*Core members of the Project Board will be:]*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Area** | **Responsibility** |
| *Project Executive* | *Name* | *Job Title* | *Chair of Project Board meetings*  *Ultimate decision-maker; responsible for the project overall*  *Ensure the project remains focused on achieving its objectives and benefits*  *Represent the needs of clinicians who utilise maternity information systems currently and those who will move towards using Lorenzo Maternity once implemented*  *Looks for value for money* |
| *Senior User* | *Name* | *Job Title* | *Specify needs of users*  *Supply user resources to the project to enable its delivery*  *Specify desired outcomes and high level requirements* |
| *Senior Supplier* | *Name* | *Job Title* | *Accountable / responsible for delivery of the project*  *Supply resources to the project to enable its delivery* |

# Plan

*[Summarise the stages and key milestones of project and target dates for completion of those milestones. This should be based on an outline project plan based on the scope being defined within this document. Highlight any high-risk dependencies that could change the milestone dates being proposed.]*

# Project Approach

*[Describe how the project will be approached based on the nature and complexity of the objective and subject matter. If the outline project plan includes key deliverables, products and/or activities intended to achieve the milestones listed in section 10, explain their purpose and how they help achieve project success.]*

# Stakeholders

*[Identify who your key stakeholders are, demonstrate that all areas potentially impacted by the project and its objective have representatives supporting the project and also include all key members of staff involved in delivering the project.]*

# Roles and Responsibilities

|  |  |  |
| --- | --- | --- |
| **Role** | **Responsibilities** | **Key Deliverables** |
| *E.g.*  *Project Board* | * *Set boundaries on scope, cost, time, benefits for project to work within* * *Consider change controls to boundaries, and make decisions (e.g. approve, reject, escalate)* * *Provide resources to deliver the project* * *Escalate exceptions to higher Board where required* * *Remove barriers to success of the project, liaising with and seeking counsel from senior/executive stakeholders* | * *Project boundaries (scope, cost, time, benefits)* * *Budget control* * *Project Plan approval* * *Project Initiation approval* * *Change control approvals* |
| *E.g.*  *Project Manager* | * *Apply project disciplines, management, framework and governance; oversee delivery; ensure all project deliverables and activities are completed within expected scope, cost, time and quality* * *Provide Project Board with progress reports, exception reports and agendas for Board meetings* * *Stakeholder relationship management from an overall project perspective* * *Supplier management* * *IT liaison for technical development and delivery* * *Transformation and business readiness planning, including communications strategy and change management approach* * *Change control management* * *Ensure quality assurance and due diligence take place on key deliverables* * *Escalate risks, issues, dependencies and constraints to Project Board where required* | * *Project Plan* * *Project Initiation Document* * *Business readiness plan, including Comms Strategy* * *Benefits realisation plan* * *Project Board agenda, minutes and reporting* * *Monthly highlight reports* * *RAID Log* * *Change Log* * *Stakeholder matrix* |
|  |  |  |